

Crisis Discourse and Discourse Crisis: a Multidisciplinary Approach

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Conference Proceedings

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*For communities in crises that
suffer annihilation, extermination, and chaos
all over the world
May this work be a tribute to their perseverance,
patience, and faith!*

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Preface

By Dr. Nabil Cherni and Dr. Thouraya Zheni

The present volume covers the proceedings of the 10th International Conference, titled “Crisis Discourse and Discourse in Crisis: a Multidisciplinary Approach”, held on 24-25 April 2025 at the Higher Institute of Applied Languages and Computer Science of Beja, Jendouba University. This conference took a multidisciplinary path, addressing a wide range of relevant topics that included linguistic, cultural, and literary studies.

Scholarly interest in discourse has long been evident across various fields, including literature, linguistics, culture studies, philosophy, psychology, and the broader humanities. Discourse analysis has illuminated critical issues, such as social injustices, power abuse, oppression, identity conflicts, cultural disparities, and other social-political and cultural issues. Manifestations of discourse, ranging from literary works and artistic expressions to political speeches and historical texts, have offered diverse perspectives on dimensions crises may take, from a quest to comprehend to attempts to grasp the forms of apprehension they trigger.

The concept of crisis, explored by many scholars across disciplines, has been in the frontline of discussions by figures in philosophy, like Aristotle (350 B.C), Kant (1800) and Husserl (1939), in psychology, like Erikson (1959) and Schmidt (2017), in politics, like Moffitt (2014) and McConnell (2020) and in linguistics, like Fairclough (1992), De Rycker and Mohd Don (2013), Wodak (2021) and Van Dijk (2023). As Wieser (2020, p. 1) notes, a “crisis conveys the idea of an imminent danger of disintegration and breakdown, as well as a pivotal turning point with the chance of a new beginning”. These explorations aim to unravel the visible and invisible configurations of crises and their individual and collective implications.

Crises span multiple domains, ranging from the economic, like the 1929 financial crisis, the political, like civil and world wars, the cultural, like identity and religion conflicts, and the medical, like pandemics. Crises articulations have also been the subject of focus, leading to the wake of post-modernity and post-capitalism. These crises are viewed as complex phenomena that are both socially produced and discursively revealed. However, discourse, in its conventional, liberal and human definition and tradition, is collapsing, opening a new field of discussion on the crisis of human discourse in the post-machine age.

Crisis discourse encompasses the ways in which crises are articulated through political, social, and media narratives surrounding significant, and even trivial events. It both reflects and shapes public reactions, influencing collective consciousness and guiding opinions and attitudes. Such discourses have the power to inspire action within communities, locally, nationally and globally, or, conversely to cultivate feelings of despair. As a legitimate area of critical inquiry, crisis discourse opens valuable pathways to explore the multidimensionality/intersectionality of crises and to provide the tools to decipher and understand emerging crises and their implications for academia, and various knowledge communities.

Discourse crisis, the second key focus of the present volume, refers to the challenges facing modes of expression and communication in complex circumstances. Such crises often stem from a lack of trust in traditional sources of information and heightened skepticism towards messages issued by the media and political institutions, among others. These factors hinder

effective communication, obscure understanding of circulating messages, and blur the line between truth and misinformation in an era of rapid information, further exacerbated by manipulation and conflicting narratives.

Spoken, written, and visual discourses produced during times of tension often reveal crises and, in some cases, play a momentous role in resolving them. However, not all discourses succeed in exposing truth or addressing social and political injustices. They may fall short of driving meaningful social change or influencing socio-political contexts. On the one hand, they might fail to convey the speaker's ethics, perceptions, emotions, cognitions, or aspirations. On the other hand, they may lack the strength to assert truths and resolve conflicts.

Although other scholars and researchers, like De Rycker and Mohd Don (2013), delved into this topic, 'crisis in discourse and discourse in crisis' is still a problematic area of research that might be broadly tackled from various angles. The aim of the present volume is to contribute to a deeper understanding of this complexity, gathering more recent and innovative studies and approaching crisis and discourse from different perspectives, including sociocultural, political, linguistic, literary, historical, and philosophical viewpoints.

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Notes on Style and Transliteration

Brill's Transliteration of Arabic Letters and Sounds

Arabic	sAts	Unicode	Arabic	sAts	Unicode	Arabic	sAts	Unicode
ا	a, ā	0101	ط	ṭ	1E6D	ى	ā	0101
ب	b		ظ	ẓ	1E93	ي	ī	012B
ت	t		ع	ʿ	02BF	و	ū	016B
ث	ṭ	1E6F	غ	ġ	0121	َ	a	
ج	ġ	01E7	ف	f		ِ	i	
ح	ḥ	1E25	ق	q		ُ	u	
خ	ḥ	1E2B	ك	k		َيَ	ai	
د	d		ل	l		وَاوْ	au	
ذ	ḏ	1E0F	م	m		يَيَ	īy	012B
ر	r		ن	n		وَوْ	ūw	016B
ز	z		ه	h		ة	a, ah, āh, at, āt	0101
س	s		و	w, ū	016B			
ش	š	0161	ي	y, ī	012B			
ص	ṣ	1E63	ء	ʾ	02BE			
ض	ḏ	1E0D						

Unicode hexadecimal values of uppercase transliteration characters

Ā	Ḑ	Ḑ	Ĝ	Ĝ	Ḥ	Ḥ	Ī	Š	Ṣ	Ṭ	Ṭ	Ū	Ẓ
0100	1E0E	1E0C	01E6	0120	1E24	1E2A	012A	0160	1E62	1E6E	1E6C	016A	1E92

Introduction

خطاب الأزمة وأزمة الخطاب

د. شكري الشريف

لقد اهتم البحث الأكاديمي بخطاب الأزمات منذ زمن طويل عبر مجالات متعددة، بما في ذلك الأدب، واللسانيات، ودراسات الثقافة، والفلسفة، وعلم النفس، والعلوم الإنسانية بشكل عام. وبحث في قضايا حاسمة مثل الظلم الاجتماعي، وسوء استخدام السلطة، والاضطهاد، وصراعات الهوية، والفروقات الثقافية، وغيرها من القضايا الاجتماعية والسياسية والثقافية. وقدمت تجليات الخطاب، بدءًا من الأعمال الأدبية والتعبيرات الفنية إلى الخطابات السياسية والنصوص التاريخية، وجهات نظر متنوعة حول الأبعاد التي قد تأخذها الأزمات، من السعي إلى الفهم، إلى محاولات استيعاب أشكال القلق التي تثيرها.

ففي عالم مليء بالأزمات، سواء كانت سياسية، اجتماعية، اقتصادية، أو كوارث طبيعية، يصبح خطاب الأزمة أداة حيوية لفهم التحديات وتحليلها. لكن، يرافق ذلك أزمة في الخطاب نفسه، حيث تتداخل الحقائق والمعلومات، مما يؤدي إلى رسائل مشفرة وغير واضحة. وتهدف هذه الورقة إلى استكشاف العلاقة بين خطاب الأزمة وأزمة الخطاب، وبيان تأثيرهما المتبادل في السياقات الاجتماعية والسياسية والثقافية وغيرها.

"خطاب الأزمة" هو الطريقة التي يتم بها التعبير عن الأزمات، ويشمل الخطابات السياسية، والاجتماعية، والإعلامية حول الأحداث المهمة. كما أشار فوكو (1971) إلى أن الخطاب له القدرة على تشكيل الوعي العام وتوجيه الآراء، مما يمكن أن يحفز المجتمع على اتخاذ إجراءات معينة أو يعزز الشعور باليأس.

أما "أزمة الخطاب"، فتشير إلى التحديات التي تواجه طرق التعبير والتواصل في ظل الظروف المعقدة. تتضمن هذه الأزمة انعدام الثقة في المصادر التقليدية، مما يزيد من عدم الثقة في المعلومات الصادرة عن المؤسسات الإعلامية والسياسية. وقد أوضح باومان (2000) أن هذا الوضع يفرض تحديات على التواصل الفعال ويفقد الرسائل معناها في زمن المعلومات المتسارعة، بسبب التلاعب بالحقائق وتضارب الرسائل. فالأزمات تؤدي إلى ظهور خطاب جديد أو تغييرات في الخطاب القائم، مما يتيح الفرصة للتعبير الإبداعي. ومع ذلك، يمكن أن تؤدي أزمة الخطاب إلى تفاقم الأزمات وتعقيد عملية الفهم والتأويل، مثلما أشار غيدنز (1991) إلى أن التغييرات في الخطاب يمكن أن تؤدي إلى تضليل الجماهير.

وتظهر العلاقة بين خطاب الأزمة وأزمة الخطاب كيفية تأثير الأزمات على الهويات الثقافية والنظم الاجتماعية، مما يؤدي إلى تغييرات عميقة في السياقات المحلية والعالمية. وهذا التفاعل يعكس التعقيد الذي يواجهه الأفراد في فهم العالم من حولهم، ويعزز الحاجة إلى خطاب واضح وموثوق في أوقات الأزمات. وبشكل عام، يمكن اعتبار "خطاب الأزمة وأزمة الخطاب" مفهومين متداخلين يسهمان في فهم كيفية تعاطي المجتمعات مع الأزمات، وكيف تؤثر اللغة والتواصل في تشكيل الواقع الاجتماعي والسياسي.

ونشير إلى أن باحثين اثنين هما دي رايدر ومهد دون (2013) قد تناولا مثل هذا الموضوع، ومع ذلك فإن "خطاب الأزمة وأزمة الخطاب" لا يزال منطقة بحثية إشكالية يمكن تناولها من زوايا متعددة. وتهدف الندوة الحالية إلى المساهمة في فهم أعمق لهذه التعقيدات من خلال جمع دراسات أكثر حداثة وابتكارًا، ومن خلال تناول الأزمة والخطاب من وجهات نظر مختلفة، بما في ذلك الاجتماعية الثقافية، والسياسية، واللسانية، والأدبية، والتاريخية، والفلسفية، والنفسية.

أزمة تحليل الخطاب بين المفاهيم الغربية والدراسات العربية

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الترجمة بالانجليزية موجودة أسفل النسخة الاصلية بالعربية صفحة 13

The English version of this chapter is below the Arabic version on page 13

الملخص

يهدف هذا البحث إلى الكشف عن المسار الإشكالي في تحليل الخطاب ويوضح أبرز جوانبه للقارئ العربي حتى يتمكن من دخول عالم الخطاب وتحليله وفق رؤية علمية وشروط نظرية ومنهجية تسهم في بلورة أفق واضح في تحليل الخطاب، وتخلصه من المتاهات التي انزلق فيها وأصبحت سمة بارزة في عناوين الدراسات التي تنسب نفسها إلى هذا المجال، وهي نظري وحسب الأسس العلمية لهذا التخصص كما ضبطها محللو الخطاب، لا علاقة لها بهذا التخصص سوى عناوين توهم القارئ وتغالطه وتزيده غموضاً وفوضى معرفية ومصطلحية. وفي هذا الإطار سعينا إلى ضبط رؤية مصطلحية من داخل تخصص تحليل الخطاب عسانا أن نفيد القارئ في فتح مسالك معرفية ومنهجية تهتم بهذا المجال المعرفي. فتوصلنا إلى فوارق دقيقة بين النص والخطاب ودراسات الخطاب وتحليل الخطاب، وبيّنا طبيعة المصادر المعرفية المتصلة بها وسبل التمييز بينها على أسس علمية ومنهجية، فمكننا ذلك من تحديد خصائص كل مجال وموضوع بحثه وطرق تحليله.

الكلمات المفتاحية: نص، خطاب، دراسات الخطاب، تحليل الخطاب، عالم الخطاب، مقارنة، منهج.

1. المقدمة

نشأ تحليل الخطاب في حقل معرفي في الفضاء البحثي الغربي في النصف الثاني من القرن العشرين؛ منذ أن نشر زليغ هاريس مقاله الشهير بعنوان "تحليل الخطاب" سنة 1952، فكان له الأثر الكبير في تغيير مسارات الدراسات اللسانية التي لم تتجاوز حينها تحليل الجملة، ثم تحولت إلى الاهتمام بالخطاب وتحليل الخطاب، فكان هذا المسار ثمرة من ثمار هذا التحول في التوجه البحثي وإعادة النظر في مفهوم الخطاب وإجراءات التحليل ومستوياته التي أصبحت واضحة إلى حد ما في الدراسات الغربية، وما زالت متعثرة في الدراسات العربية، ولم تتضح فيها المسالك بعد؛ إذ لاحظنا خلطاً عجباً رهيباً فيما يصدر في الوطن العربي في شأن هذا الحقل المعرفي الذي أصبح يمثل خليطاً من التخصصات، كل يدلي بدلوه فيه، أو يدعي الانتماء إليه، أو حتى الاختصاص فيه، والحال أن الأمر في الدراسات الغربية المؤسسة له ليس كذلك إلى حد ما، وفي هذا الإطار نهدف من خلال هذا البحث إلى تقديم رؤية تكشف فيها عن المصادر المعرفية المؤسسة لهذا المجال والضابطة لأسسه المنهجية؛ عسانا أن نسهم في توضيح بعض المغالطات التخصصية، أو نذلل بعض الصعوبات التي تواجه الدارس في هذا المجال بتتبع مسارات التخصص في مظانها الأولى، ومن ثم إعادة توضيح مفهوم الخطاب وتحليل الخطاب كما قدمتهما الدراسات الغربية، وبيان أسباب هذا الخلط الذي يخترق الدراسات العربية.

برزت مصطلحات مثل: تحليل الخطاب، ولسانيات الكلام، ولسانيات اللغة في القرن العشرين، وقبل ذلك كانت الحقول المعرفية التي تعنى بدراسة النص منضوية تحت البلاغة والفيلولوجيا. لكن عودة اللسانيات في النصف الثاني من القرن العشرين إلى الفلسفة والتاريخ والعلوم الاجتماعية والنفسية والأنثروبولوجيا وغيرها أدت إلى طرح أسئلة جوهرية تتعلق بتحديد التخصصات ومجالاتها ونقاط التقائها واختلافها. ومن أبرز هذه الأسئلة: ما النص؟، وما مجاله؟، وما الخطاب؟، وما مجاله؟، وما المكتوب؟، وما المجال؟، وما الشفوي؟، وما مجاله؟، ثم ما آليات التحليل المعتمدة في كل هذه المجالات؟ ففي إطار تلك التساؤلات بدأت الحيرة تشق طريقها إلى المنشغلين بالنص والخطاب وتحليل الخطاب، ودفع هذا الغموض الباحثين إلى التمييز بين هذه المصطلحات ومجالات اهتمامها. فإلى أي حد استطاعت البحوث التي تسم نفسها بتحليل الخطاب أن تستجيب إلى هذا التمييز بين الحقول المعرفية والمصطلحية؟، وإلى أي مدى استطاعت ضبط مصادرها المعرفية وأسسها

المنهجية؟ سنجيب عن هذه الأسئلة وغيرها بتتبع مسارات تحليل الخطاب واتجاهاته في الدراسات الغربية والعربية؛ لنقف عند أهم ما توصلت إليه من نظريات ومقاربات وإجراءات منهجية تحليلية.

2. المصادر المعرفية

ظلّ تحليل الخطاب منذ بدايته محلّ اختلاف حتى داخل المدرسة الفكرية الواحدة، مثلما حصل في المدرسة الفرنسية، حين اختلفت الرؤى والمسارات منذ الستينيات من القرن العشرين؛ حيث لم توجد عند ميشال فوكو Foucault - الذي اهتم اهتماما كبيرا بالخطاب- علاقة بين الخطاب واللسانيات، أمّا عند ميشال بيشو Pêcheux فإن تحليل الخطاب اندرج ضمن الفلسفة الماركسية والتحليل النفسي واللسانيات البنيوية، وهدف من هذه المكونات إلى تفكيك النصوص واستخراج أبعادها الإيديولوجية والنفسية التي تهتم باستعمال اللغة استعمالا حقيقيا محاطا بسياق إنتاجي يتولد فيه المعنى. وأعتبر تحليل الخطاب امتدادا للدراسات التي تهتم بعلاقة اللغة بالمجتمع، وهي علاقة تهتم بدراسة جميع أنواع النصوص باستعمال المناهج اللسانية قصد فهمها وربطها بسياقات إنتاجها الاجتماعية والتاريخية. وبذلك سادت هذه النظرة في الدراسات الفرنسية إبان الستينيات، لكنها بدأت تتغير شيئا فشيئا بعد ذلك متأثرة بالدراسات الأمريكية التي كانت أوضح في تحديد هذا المجال¹.

وهكذا كانت المدرسة الفرنسية تميز بين اتجاهين: اتجاه فلسفي أصبح يسمى فيما بعد "بنظرية الخطاب" المنبثقة عن الفلسفة بقيادة فوكو وبيشو، واتجاه لساني بقيادة باتريك شارودو وكربرات أوركيني ودومينيك منغو وغيرهم يهتم بتحليل الممارسات اللغوية داخل المجتمع بالاعتماد على المقاربات البراغمية ونظريات التلفظ ولسانيات النص قصد معالجة مدونات مختلفة سياسية ودينية وإعلامية ومحادثية، وغيرها. وفي مقابل ذلك تنوعت مشارب مصادر تحليل الخطاب في المدرسة الأمريكية، مثل: الأنثروبولوجيا والانتوميتودولوجيا وانتوغرافيا الاتصال وتحليل المحادثة، والاهتمام بما هو يومي طقوسي، كما فعل غوفمان Goffman.

من ذلك يتبين لنا أنّ المصادر مختلفة بين المدرستين؛ مما يؤدي حتما إلى تضارب المفاهيم وصعوبة تحديد المجال. وكذلك يعود الاختلاف في تحديد مجال تحليل الخطاب إلى مفهوم الخطاب نفسه حسب المرجعيات الفكرية للدارسين سواء أ كانت فلسفية تتعلق بالنظريات أم بحوثا تجريبية تتعلق بكيفية اشتغال اللغة. وقد تبنى اللسانيون المسار الثاني؛ فالخطاب عندهم هو: استعمال اللغة، ويتحدد شكليا بكونه يتجاوز الكلمة أو مجموعة من الكلمات أو الجملة، ويرتبط بعملية الاتصال من الناحية الفكرية.

1.2 ما النص؟

تحدّد التعريفات القاموسية النص تحديدا تغلب عليه الجوانب الشكلية المكونة لمفهومه؛ ففي لسان العرب يرى ابن منظور أنّ النص هو: "الرفع والإظهار، وجعل بعض الشيء فوق بعضه، وبلوغ الشيء أقصاه ومنتهاه، والتحريك والتعيين على شيء ما، والتوقيف" (ابن منظور، 1994)، وعرّفت القواميس الغربية الفرنسية والانجليزية النص بأنه: "مجموعة المصطلحات والجمل التي تشكل كتابة وعملا مكتوبا"². وبطريقة أكثر وضوحا وتفصيلا يعرف النص بأنه: مجموعة من الشروط ضبطها القاموس الفرنسي على النحو التالي: "1. مجموعة تكوينية لكتابة ما. 2. عمل أدبي أو جزء منه. 3. الجزء المكتوب أو المطبوع من الصفحة (في مقابل الجزء الأبيض منها أو الهامش). 4. محتوى، صياغة دقيقة (نص قرار أو حكم، مثلا). 5. موضوع، نص امتحان"³. وورد في القاموس الإنجليزي كولنز أنّ النص هو "1. كتاب أو الجزء الرئيسي منه، وليس المقدمة أو الصور أو الملاحظات. 2. النص هو أي مادة مكتوبة. 3. نص الخطاب أو البث أو التسجيل هو النسخة المكتوبة منه. 4. النص هو كتاب أو قطعة أخرى من الكتابة خاصة تلك التي ترتبط بالعلم والتعلم"⁴. ويتبين لنا من هذه التعريفات أنها تشترك في ربط مفهوم النص بالكتابة بصفة عامة، وقد أضاف بعضها إلى هذا الشرط مصطلح الأدب؛ فضيق

¹ انظر كتابنا الوصائل في تحليل المحادثة: دراسة في استراتيجيا الخطاب إريد عالم الكتب الحديث، 2012.

² انظر هذا التعريف في القاموس الفرنسي:

Dictionnaire de Français Larousse: <https://www.larousse.fr/dictionnaires/francais/texte/77624>

³ انظر هذا التعريف في القاموس الفرنسي:

Dictionnaire Français Définition : définitions, exemples, synonymes et expressions.in <https://dictionnaire.reverso.net/francais-definition/text%C3%A9>

⁴ انظر هذا التعريف في القاموس الإنجليزي:

Collins English Dictionary: <https://www.collinsdictionary.com/dictionary/english/text>

مفهوم النص وخصصه بالنص الأدبي أو العمل الأدبي أو جزء منه. أما الدراسات اللسانية التي اهتمت بمفهوم النص فقد ربطته بصفة عامة بالشروط الشكلية وبالقارئ؛ فالنص في تلك الدراسات عبارة عن سلسلة من الكلمات أو العبارات أو الجمل التي تجتمع في مقطع من العمل المكتوب بأشكال وصيغ مختلفة، بقطع النظر عن الحجم من حيث الطول والقصر، ويهدف نقل مجموعة من المعاني إلى القارئ.

وتختلف أشكال النصوص وموادها المكتوبة؛ إذ يمكن أن تكون كتباً ومجلات وصحفاً ومحتوى في صفحات الانترنت ورسوماً وإعلانات ولوحات فنية وغير ذلك من الرموز. وقد تطور مفهوم النص في آخر ستينيات القرن العشرين خاصة مع ظهور لسانيات النص في فرنسا وأوروبا بشكل عام؛ فأعلن جاك دريدا (1967) عن أن "لا شيء يوجد خارج النص"، وصرح رولون بارت (1968) "بموت المؤلف"؛ فعوض بذلك المفهوم القديم الذي كان قائماً على الكتابة والكتاب⁵. ثم بدأ مفهوم النص يتغير ويتوسع بعد ترجمة أعمال بارت ودريدا وغيرهما إلى الإنجليزية في أواسط السبعينيات ليشمل شروط تحقق "النصية"، وانفتح على الأبعاد الثقافية، وأصبح ينظر إليه في الدراسات النقدية على أنه جزء من الحياة الاجتماعية⁶. وهكذا يعني مصطلح نص "text" الذي اشتق من الفعل "texere" ومن الكلمة اللاتينية "textum": ما هو مكتوب. ويرتبط أساساً بالكتب المقدسة أو بما يخطه العلماء من كتابات، ويلتصق بمفهوم النسيج "texture" ومفهوم البناء "construction". وهكذا ظل إلى القرن التاسع عشر، ثم أصبح في القرن العشرين يتحدد بمعايير الجودة الأدبية والجنس الأدبي؛ فيوسم بأنه نص حجاجي، أو وصفي، أو سردي، أو تفسيري، أو حوار، أو جدلي، إلخ. وبعد تطور النظريات اللسانية النصية والنقدية أضيفت إليه معايير أخرى، مثل: أهمية المتلقي والسياق الثقافي والفكري، بل ذهب بعضهم إلى وصفه بالشعري والمكتوب في السنوات الأخيرة؛ مما جعل البعض يعرفه بالتداخل مع الخطاب، وهو ما أحدث تداخلاً بينهما أوحى للمشغلين بتحليل النصوص الأدبية وغيرها من النصوص المكتوبة أنهم يحللون خطابات، ولكن الفرق بين النص والخطاب⁷ يكمن في عدة تفاصيل علينا توضيحها بتحديد مفهوم الخطاب ذاته؛ حتى نتجنب هذا الخلط، ونجلي هذا اللبس.

2.2 ما الخطاب؟

يرتبط الخطاب في المعاجم في معناه العام بأيّ كلام شفوي يخص موضوعاً معيناً يقدمه متكلم أمام جمهور في مناسبة رسمية أو غير رسمية، ويعرف لسانياً بأنه اللغة التي يستخدمها المتكلم في حالة فعلية، (أي الكلام بالمعنى السوسيري للكلمة)، وهو كل ملفوظ يتجاوز الجملة، ومن الناحية البنوية استرسال لمتتالية من الجمل⁸. ويعرف كذلك بأنه التواصل المنطوق أو المكتوب الطبيعي بين الناس في السياق، وترادفه المصطلحات التالية: المحادثة، الحديث، المناقشة، الكلام⁹. ويعود مصطلح الخطاب وفق بعض اللسانيين إلى الأصول البلاغية القديمة؛ إذ يعني بشكل أساسي الإنتاج الشفوي (كريستال، 2008، 148). وأما عند العرب فقد ارتبط مفهوم الخطاب بالتخاطب، فهو: "مراجعة الكلام، وقد خاطبه بالكلام مخاطبة وخطاباً وهما يتخاطبان" (ابن منظور، مادة، خطب، 1994، 361). ويحللنا هذا التعريف على ما تقدمه اللسانيات اليوم من "أنّ الخطاب حوار متبادل بين شخصين على الأقل، فهو عملية تلفظية حيوية في الزمان والمكان يديرها شخصان أو أشخاص بالكلام وبغير الكلام" (الميساوي، 2015، 178). ننتبّه من هذه التعريفات أنّ الخطاب يغلب عليه الطابع الشفوي بما يتطلبه من قيود إنتاجية وإجرائية، ويدور بين متلفظين [أنا] و[أنت] ينتجان ملفوظاً يتجاوز الجملة من حيث الطول. ولكن هناك من الدارسين من يربطه كذلك بالمكتوب، أي: النص؛ فيرى أنّ أيّ خطاب شفوي يمكن أن يحول إلى نص مكتوب بشروط وخصائص خطابية، مثل: كتابة لوائح اللوم والاعتذار، والثناء، والتهام، والدفاع، والنصوص القانونية والإدارية، والبيانات السياسية، والخطب الدينية، وغيرها، وهي نصوص مكتوبة ولكنها ذات طابع شفوي يسهل تحويلها من الشفوي إلى المكتوب والعكس

انظر بحوثه التالية:⁵

Barthes, R. (1968). La mort de l'auteur, reprinted in Barthes (1984), pp. 61–67.

Barthes, R. (1971). De l'oeuvre au texte, reprinted in Barthes (1984), pp. 69–77.

انظر حول التحولات التي مر بها مفهوم النص في النصف الثاني من القرن العشرين:⁶

Wilson Adrian, (2012). What is a text? In *Studies in History and Philosophy of Science* 43, pp 341–358.

انظر كذلك حول الفرق بين النص والخطاب: الزناد الأزهر، (2011)، النص والخطاب: مباحث لسانية عرفية، تونس، مركز النشر الجامعي/دار محمد علي للنشر.

انظر حول هذا التعريف:⁸

Dictionnaire de Français Larousse: <https://www.larousse.fr/dictionnaires/francais/discours/25859>

انظر كذلك:⁹

Collins English Dictionary: <https://www.collinsdictionary.com/dictionary/english/discourse>

صحيح. وتشير هذه الأنواع من الخطابات إلى تجذرها في عملية الاتصال بين المتخاطبين، أي في الواقع التواصل والتفاعلي في سياق معين وأمام جمهور معين منتج ومتلق في الآن نفسه. ولا توجد طريقة قياسية لكتابة الخطاب فكل خطاب كتابة خاصة بنوعه وسياقه وأهدافه التواصلية وموضوعه؛ لذلك عادة ما يرد مصطلح الخطاب مخصصا بصفة تعرفه وتحدد نوعه ومجاله التواصل، فنقول: الخطاب السياسي، والخطاب الديني، والخطاب النقدي، والخطاب الإعلامي، والخطاب الاجتماعي، والخطاب الثقافي، والخطاب التعليمي، والخطاب الفلسفي، إلخ.

3. الخطاب في الدراسات الفلسفية والنقدية

سبقت دراسات الخطاب دراسات اهتمت بفلسفة اللغة، وكان من أبرز مؤسسيها فيتغنشتاين وميخائيل باختين وميشال فوكو، "ولكن إسهاماتهم لم تكن لتهم إلا بجزء من هذا الحقل الكبير، ولم ينحت أي منهم تحت أي مسمى آخر - مجالا يغطي تقريبا تحليل الخطاب الحالي" (منغون، 2020، 3). وننتبين من هذا أن هناك فرقا بين دراسات الخطاب التي تأسست ضمن حقل الفلسفة خاصة ما قدمه الفيلسوف الفرنسي ميشال فوكو، وكذلك الخطاب ضمن حقل الدراسات الأدبية والنقدية التي ظهرت تحت مسمى دراسات ما بعد البنيوية. فقد ربط فوكو مفهوم الخطاب¹⁰ بالتاريخ والمعرفة، وتاريخ العلوم، والسلطة والإرادة، والمراقبة، والعقاب، والجنس والأخلاق¹¹، واستند في ذلك إلى التحليلات التاريخية والأركيولوجية والفلسفية؛ فنظر إلى اللغة باعتبارها منتجة لخاطبتين اثنتين: خطاب شارح للغة الخام وخطاب تأويلي لما هو مخفي في بطون النصوص، وفي منظوره "بالفعل، فإن اللغة توجد أولا، في كيانها الخام البدائي... لكنها سرعان ما تنتج ولادة شكلين آخرين من الخطاب يحيطان بها من كل الجهات: فوقها الشرح الذي يستعيد المعطى في كلام جديد، ومن تحتها النص الذي يفترض الشرح أولويته المخفية تحت العلامات المرئية للجميع" (فوكو، 1990، 58).¹² ويعرف فوكو الخطاب بقوله: "هو أحيانا يعني الميدان العام لمجموع الملفوظات (énoncés)، وأحيانا مجموعة أخرى من الملفوظات، وأحيانا ثالثة ممارسة لها قواعدها، تدل دلالة وصف على عدد معين من الملفوظات وتشير إليها" (فوكو، 1986، 78). ويبدو من هذا أن المنطوق أو الملفوظ هو محور الخطاب، وعليه يركز وجوده؛ فالمنطوق صفة تميز الخطاب عن مجموعات أخرى قد تتشابه معه، مثل: النصوص المكتوبة. ويمكن للمنطوق أن يدون ويكتب ويكرر، أي: يتحول من الشفوي إلى المكتوب بطرق معينة ومناهج متفق عليها؛ لذا يعتبر المنطوق الإشارة الأولى لعملية التحليل التي تشمل اللغة والحياة الاجتماعية الطبيعية.

ويرى فوكو أن الخطاب يكمن في العلاقة بين الاسم والمسمى، أي: في علاقة التماثل بينهما؛ فالاسم معزولا لا يدخل في التمثيل وكذلك المسمى، وبالتالي فهما من نظام اللغة، وحين توجد علاقة تماثل بينهما ينتج عن ذلك الخطاب. وبهذا تكمن مهمة الخطاب في إسناد اسم للأشياء؛ "فلكي تتمكن الكلمة من التعبير عما تعبر عنه، عليها أن تتخبط في نظام نحوي كلي يكون بالنسبة إليها الأسبق والمحدد الأساس" (فوكو، 1990، 236). ولكن لكي يكون الخطاب خطابا عليه أن ينخرط في تشكيلة خطابية تحدد ميدانه وتضبط قوانين اشتغاله في الممارسة التاريخية والاجتماعية في إطار "أركيولوجيا المعرفة"، ويتسم ميدانه بأنه ممارسة فعلية للملفوظات، أي: ما ينطق به من أحداث كلامية أو ما تعتبره نظرية أفعال الكلام أفعالا كلامية. لأجل ذلك يرتبط الخطاب بالمنظومة التكوينية، وهي "ليست إطارا ثابتا ولا شكلا ساكنا يفرض نفسه على الخطاب" (بغورة، 2000، 109)؛ فكل خطاب منظومته الخاصة به تمثل جزءا من تكوينه الذاتي، فيميزه ذلك عن النص المكتوب الذي يصنف عادة ضمن جنس من الأجناس القارة، مثل: القصة، أو الرواية، أو السيرة الذاتية، أو الشعر، إلخ. وكذلك يرتبط مفهوم الخطاب عند فوكو بمفهوم الممارسة التي تتأسس على "مجموعة من القواعد الموضوعية والتاريخية المعينة والمحددة دوما في الزمان والمكان، والتي حددت في فترة زمنية بعينها وفي نطاق اجتماعي واقتصادي وجغرافي، أو لساني" (فوكو، 1986، 113). ولذلك فالخطاب ممارسة في علاقة بالذات المنتجة له - أي: المتكلم -، وكذلك في علاقة بشروط إنتاجه. أي: أن الممارسة يجب أن ترتبط بفضاء المكان، والزمان، واللغة المستعملة، والجوانب الاقتصادية والاجتماعية المقيدة لعملية الإنتاج. وهي ممارسة مشروطة باستراتيجيات الخطاب¹³.

¹⁰ ظهر مفهوم الخطاب عند فوكو في كتابين رئيسيين هما:

Michel Foucault (1969), *L'archéologie du savoir*. Paris Edition Gallimard.

(1971), *L'ordre du discours*. Paris Edition Gallimard.

¹¹ انظر الزواوي بغورة: مفهوم الخطاب عند ميشال فوكو، القاهرة، المجلس الأعلى للثقافة، 2000.

¹² انظر الزواوي بغورة مفهوم الخطاب عند ميشال فوكو، ص 55.

¹³ انظر حول رهانات الاستراتيجيات في الخطاب عند فوكو البحث التالي:

ولا يبحث فوكو في تكوين بنية الخطاب، ولا يعنيه حدوث المعنى، بقدر ما يعنيه تحولات المعنى، أو توقعه ليظهر شيء جديد؛ فهو يهتم بكيفيات اشتغال الخطاب في مرحلة تاريخية معينة¹⁴، معتمداً على التقابل بين اللغة الخطابية واللغة غير الخطابية؛ ليحدد مفهوم الخطاب باعتباره نظرية فلسفية تقوم على تحليل الأفكار؛ فـ "الخطاب والمنطوق والتشكيلات الخطابية يتنافى وما تعودنا على تسميته في إطار تاريخ الفكر بالنص، والأثر، والقضية، والجملة، والمجال العلمي، أو الفرع العلمي؛ فهذه المفاهيم كلها في نظر فوكو لها علاقة بـهم الأفكار الاتصالية. وما يريد تأسيسه هو تاريخ القطائع، والانفصالات؛ لذلك اعتمد على مفهوم الخطاب كحدث تاريخي يطبعه الانفصال والقطيعة" (بغورة، 2000، 113). لذلك فإن تحليل الخطاب عند فوكو "لا يكون فقط بكلمات لسانية، كما أنه ليس حالة داخل اللغة... الخطاب شيء بالضرورة يتجاوز اللغة" (فوكو، 1989، 39). ولأجل ذلك وضع فوكو منهجا تحليليا خاصا به سماه "الأركيولوجيا"، يقوم على الحفر والتنقيب في ملفوظات الأرشيف، وصفا وتكويننا داخليا وخارجيا؛ فالمنهج عنده هو الحفر في كيفية تكوين الخطاب وظهوره إلى الوجود، وتحليل الخطاب عنده هو التحليل الأركيولوجي للمنطوق، باعتباره حدثا كلاميا قابلا للتدوين والتكرار، ويتميز عن العمل الأدبي أو العلمي اللذين أخرجهما فوكو من دائرة تحليل الخطاب، "وفي إطار هذه النظرة المحددة مسبقا فإن التقطعات المفترضة بين فترات فوكو خاصة تلك التي تميز بين الأدب/الخطاب و السياسة/السلطة والأخلاق/الذاتية، وتلك التي حولها تنتظم المنتجات اللاحقة في مختلف الأرضيات العلمية ستبقى دائمة، لكنها لا تستنفد إمكانية القراءات الأخرى التي قد تكون أقل اتساقاً مع الأقسام التخصصية الداخلية والخارجية، أو مع التقسيم القطاعي المتوقع حسب موضوع البحث" (رينغوت، 2010، 11).

نستنتج مما سبق أن مفهوم الخطاب في المنظور الفلسفي والنقدي يبقى أقرب إلى مفهوم القول، أي: ما تسمح به اللغة والفكر من إنتاج خطابات شفوية أو مكتوبة، منه إلى مفهوم التخاطب المبني على التفاعل والتشارك في إنتاج التبادل الكلامي الحي، وهو مجال تحليل الخطاب. ولهذا السبب وغيره ميزت اللسانيات بين "دراسات الخطاب" التي هي شأن فلسفي ونقدي يبحث في طرق إنتاج الفكر وطرق نقده، و"تحليل الخطاب" الذي هو شأن لساني واجتماعي يشتغل على بيان قوانين إنتاج التخاطب أو التحدث وآليات تحليله اللسانية وغير اللسانية.

4. الخطاب في الدراسات اللسانية

ارتبط مفهوم الخطاب في الدراسات اللسانية أول مرة ببويسنس Buysens سنة (1943)¹⁵، ثم بدأ يأخذ مسارات مختلفة في النصف الثاني من القرن العشرين خاصة بعد ظهور مقال زليغ هاريس (1952) الذي فتح مسلكا جديدا في الدراسات اللسانية المهمة لسانيات النص في أوروبا وتحليل الخطاب في الدراسات اللسانية الأمريكية، ولذلك ميز الدارسون بين مدرستين في تحليل الخطاب مدرسة فرنسية (أوروبية) ومدرسة أمريكية (أنغلو سكسونية)، وفي هذا الإطار تم التمييز بين الخطاب وتحليل الخطاب¹⁶، فقد برزت الدراسات المؤسسة لمفهوم الخطاب في اللسانيات في عدة توجهات، من أبرزها ما ألفه رولون بارت سنتي (1964، 1966) الذي رأى أنه "لتحديد الخطاب، يجب أن نتجاوز ما هو لساني إلى ما هو "عابر لللساني" مع مادة بحثية، مثل: الأسطورة، والسرد، وأشياء الحضارة، شريطة أن تتحول إلى كلام منطوق" (بارت، 1964، 81). وهنا يبرز شرط الشفوية محدد أساسي في مفهوم الخطاب، ثم طور هذا التعريف ليهتم بالجانب الشكلي؛ فأصبح "الخطاب جملة كبيرة... كما أن الجملة هي خطاب صغير" (بارت، 1966، 3). من ذلك نستنتج أن الخطاب عنده هو كلام منطوق قد يكون جملة صغيرة أو كبيرة. أما بالنسبة إلى بنفيسست؛ فالخطاب عنده يمثل مستوى من مستويات الدلالة، ويجب دراسته في علاقة باللغة؛ إذ لا يمكن فصله عن دراسة العلامة اللغوية التي تنتج وتؤوله (بنفيسست، 1974، 50). ولأجل ذلك أصبح الخطاب في نظرية التلطف مرتبطا بالنظام الداخلي للغة والعالم الخارجي الذي يحيل على المتكلم، أي: يرتبط بما هو لساني، وما هو غير لساني، وأصبح المتكلم أو المتلفظ عنصرا أساسيا في تكوين الخطاب وتحليله.

وفي اللسانيات الأمريكية أو الانغلو سكسونية ارتبط مفهوم الخطاب بالدراسات الميدانية التجريبية في إطار اللسانيات الاجتماعية، والانثروبولوجيا، وانتوغرافيا الاتصال، واللسانيات التفاعلية، وعلم الاجتماع اللغوي، وهي دراسات تعتمد على

Bilba Corneliu, (2014). Les enjeux stratégiques de la théorie du discours chez Foucault, in Meta: Vol. VI, n°. 2, pp. 526-550.

انظر الزواوي بغورة مفهوم الخطاب عند ميشيل فوكو ص 80¹⁴

انظر كتابه: ¹⁵

Buysens Eric, (1943). *Les langages et le discours*. Bruxelles, Office de Publicité.

انظر حول هذه المسألة كتاب: الخطاب وتحليل الخطاب لمنغون (2020). ¹⁶

تسجيل المحادثات وتحليلها من زوايا منهجية مختلفة¹⁷. فبذلك تحدد مفهوم الخطاب على أسس لسانية واجتماعية، شريطة أن يكون مستعملاً؛ إذ اعتبر فاركلاف أنه " عند استعمال مصطلح الخطاب أقترح المحافظة على اللغة المستعملة باعتبارها شكلاً من أشكال النشاط الاجتماعي" (1992، 16). وبهذا ارتبط النشاط اللساني بالنشاط الاجتماعي والثقافي، وما يفرضه المحيط على عملية الإنتاج والفهم والتأويل من مؤثرات وقيود سياقية وبراغمية. ونستنتج مما سبق من آراء وتعريفات أن منطلق الخطاب في المدرسة الفرنسية /الأوروبية هو الفكر الفلسفي والنقدي واللساني¹⁸، وهو شفوي ومكتوب، حيث تكون الكتابة فيه في الأصل إنتاجاً شفويًا تحول إلى مكتوب، مثل: الأسطورة والحكاية والتاريخ، إلخ. أما الخطاب في اللسانيات الأمريكية فأسس على المنطلقات الاجتماعية والثقافية واللسانية، وهو استعمال شفوي مباشر مجاله دراسة المجموعات المتلفزة في ميادين بحثية مختلفة.

5. العلاقة بين الخطاب وتحليل الخطاب

يدخل الخطاب بدقة من الناحية اللسانية في تقابلات ثلاثة كبرى يمكن أن تحدد مفهومه، وهي: الخطاب مقابل الجملة، والخطاب مقابل اللغة، والخطاب مقابل النص¹⁹. فالخطاب إذن وحدة لسانية تتجاوز الجملة من الناحية الكمية، وهو مرتبط بالاستعمال اللغوي من الناحية المفهومية. والخطاب عند منغون محدد بالخصائص التالية:

1. وحدة لسانية تتجاوز الجملة.
2. شكل فعلي أفعال كلامية.
3. شكل تفاعلي يشترك فيه شخصان أو أكثر ويقوم على التبادل الكلامي الشفوي.
4. ينتج في سياق.
5. يحمل على المتكلم (أنا / الآن / هنا).
6. محكوم بقواعد (قوانين الخطاب، قواعد المحادثة، مصادر المحادثة).
7. ينظر إليه في علاقته بتداخل الخطاب (مسألة الفهم والتأويل).
8. يكون المعنى اجتماعياً، أي: أن إنتاج المعنى فيه يخضع للممارسات الاجتماعية²⁰.

وأمام هذا التمشي الفلسفي واللساني الذي عرفته المدرسة الفرنسية ظهرت " نظرية الخطاب" المنبثقة عن المناقشات الفلسفية المهمة باللغة، وهي مختلفة عن " تحليل الخطاب" بالمعنى الدقيق؛ إذ تهتم نظرية الخطاب بالمشاريع الثقافية التي تمزج بطرق مختلفة الانشغالات بمسائل ما بعد البنيوية والدراسات الثقافية والبنائية، وتطرح أسئلة تتعلق بمقتضيات العلوم الإنسانية والاجتماعية، خصوصاً حول الذات، والمعنى، والسلطة، والاختلاف الجنسي، والكتابة، واختلاف الرأي، وما بعد الاستعمار. وفي هذا الإطار تم التمييز بين "دراسات الخطاب" discourse studies التي تهتم بإشكاليات الخطاب، و"تحليل الخطاب" discourse analysis الذي يهتم بوقائع اللغة. وبالتالي تختلف أسئلة الخطاب عن أسئلة تحليل الخطاب؛ فتهتم الأولى بالقضايا الفكرية والفلسفية كما طرحها فوكو وغيره في المدرسة الفرنسية أو (كوك غي، 1989) و(جيمس بول غي، 1999) وغيرهما في المدرسة الأنغلو سكسونية، وتهتم الثانية بفحص المظاهر البنيوية ووظائف استعمال اللغة في المحادثة كما هي في الواقع مثلما طرحتها المدرسة الأمريكية. ولذلك في رأي مؤلفي " دليل تحليل الخطاب"، " ليست القضايا المرتبطة بتعريف الخطاب وتحليل الخطاب شيئاً واحداً بأي حال من الأحوال." (شيفرن وتانن وهاملتون، 2001 [2022]، 25).

ويقع الخط الثالث بين الخطاب والنص جراً غيباً الوعي الدقيق الذي يميز بين خصوصيات كل مصطلح منهما؛ نظراً إلى العلاقة المعقدة بينهما التي لا يسهل تفكيكها إلا من قبل المختصين²¹. فيشترك النص مع الخطاب في القضايا البنيوية، مثل: (الربط، والترابط، والإحالة، والتضمين، والتركيب...)، ويختلف الخطاب عن النص بما يضيفه من أنشطة اجتماعية شفوية، مثل: (الإيماءات، وفضاءات التخاطب، والنظرات، والتنغيم، والعلاقة بين المتكلمين...). فهناك بعض النصوص

انظر كتابنا: مقاربات براغمية في تحليل المحادثة: مباحث نظرية وتطبيقية، تونس، دار كلمة، 2023.¹⁷

تختلف المنطلقات اللسانية الأوروبية عن نظيرتها الأمريكية من حيث الخلفية الإبيستيمولوجية والمنهجية، فاعتمدت المنطلقات التاريخية والمقارنة، ثم اهتمت بدراسة النظام اللغوي في علاقته بالمنطق والمعنى. أما اللسانيات الأمريكية فقد اهتمت بدراسة المدونة الشفوية انطلاقاً من الانتروبولوجيا والدراسات الميدانية المتصلة بالمجتمع في الحياة اليومية.

انظر كتابنا المصطلح اللساني وتأسيس المفهوم، بيروت منشورات ضفاف، ط2، 2015.¹⁹

انظر حول هذه القواعد والشروط: الخطاب وتحليل الخطاب لمنغون (2020).²⁰

انظر كتاب المصطلح اللساني وتأسيس المفهوم. وانظر أيضاً لزه الزناد النص والخطاب²¹

تنتمي إلى جنس الخطاب؛ لأنها نصوص تواصلية، مثل: المعلقات الإشهارية، والإعلانات، والجرائد. وهناك نصوص لا تنتمي إلى جنس الخطاب، مثل: النصوص الدينية والأدبية والتوثيقية... حتى وإن اعتبرنا الأدب بمثابة الخطاب فإننا سنشغل بالتقسيم التقليدي للدراسات الأدبية الذي ينقسم إلى فرعين: فرع يهتم بالنص في حد ذاته، وفرع يهتم بالسياق الذي أنتج فيه النص وصاحبه والحقبة التاريخية، وهي في هذه الحالة أقرب إلى "تحليل المحتوى" الذي يعتمد على استخراج المعنى من الوثائق، ولهذا الغرض ظهرت لسانيات النص، ولذلك لا يدرس تحليل الخطاب الأعمال الأدبية التي تكون مدونة مسبقاً، مثل: دواوين الشعر والأعمال الأدبية؛ بل يدرس المحادثات والمناقشات والحوارات التلفزية الحية، إلخ. وبالتالي يختلف النص عن الخطاب حسب طبيعة المدونة، فمدونة النصوص معدة مسبقاً، بينما مدونة الخطاب حينية، تخضع للنسخ والتدوين وفق طرق علمية خاصة متفق عليها. إذن لا يكمن موضوع تحليل الخطاب في كيفية اشتغال النصوص ولا وضعية الاتصال؛ بل هو ما يربطهما بالجهاز التلفزي، الذي يرتبط بدوره بالشفوي والمؤسسي على حد سواء؛ لذلك يكون الجانب اللساني والاجتماعي معاً مجال تحليل الخطاب، ولا يمكن فصلهما عن بعضهما، وإلا ستكون عملية الاشتغال في الخطاب بعيدة كل البعد عن تحليل الخطاب. وانطلاقاً من هذا التصور يمكن أن نحل الإشكاليات المتعلقة بالنص والخطاب وتحليل الخطاب بالاعتماد على المدونة التي يحللها كل في مجال تخصصه. وعليه يمكن للدراسات العربية التي تسودها فوضى المصطلح وعدم التمييز بين التخصصات أن تراجع نفسها، وتدقق مجالات تخصصها وفق الشروط العلمية، وليس وفق الأهواء والنزعات الإيديولوجية، إلخ.

6. الأسس المنهجية لتحليل الخطاب

تتعدد مقاربات تحليل الخطاب بتعدد أنواع الخطاب، فيمكن أن نضع لكل نوع خطابي مقارنة تناسبه، والمنطلق في ذلك دائماً هو الخطاب نفسه، ولذلك تختلف مقاربات التحليل المتبعة في تحليل الخطاب السياسي - مثلاً - عن المقاربات المتبعة في تحليل المحادثة العفوية الحرة، والأمر نفسه بالنسبة إلى الأنواع الأخرى. لكن هذا التنوع في الخطابات والمقاربات ليس معزولاً ومستقلاً عن بعض الثوابت المشتركة، مثل: المتكلم أو المشاركون، والسياق، ووضعية التلطف، والتفاعل، والتواصل. ولكي نضبط الأسس المنهجية لتحليل الخطاب علينا أولاً أن نعرّفه، ونحدد مجالاته، ومن يقوم بتحليله.

1.6 ما تحليل الخطاب؟

انقسمت الدراسات اللسانية في القرن العشرين خاصة في النصف الثاني منه إلى مسارين اثنين، هما: مسار يدرس اللغة باعتبارها نظاماً رمزياً مشفراً (Language code)²²، ومسار يدرس اللغة في علاقتها بالواقع وبالمجتمع (language discourse)²³. وإذا قبلنا بهاتين المقاربتين المختلفتين في البحث في نظام اللغة وانتظامها، فليس من الدقة أن نعتبر المقاربة الثانية - أي: تحليل الخطاب - حديثة النشأة في المطلق، دون وجود أي أصل تتصل به في الدراسات اللغوية في الماضي. فالعلماء القدامى الإغريق والرومانيون كانوا واعين بهذا الفصل والاختلاف؛ ففصلوا الدراسات الخطابية (البلاغية) عن الدراسات النحوية، واستمرت هذه الرؤية في الدراسات اللغوية التي تدرس القواعد اللغوية دراسة مجردة عن السياق إلى أن ظهرت نظرية أفعال الكلام، وطرح السؤال المركزي: كيف نصنع الأشياء بالكلمات؟، وكيف ننجز الوقائع والتأثيرات، ونحقق تواصلنا ناجحاً مع الآخرين في سياقات مختلفة؟²⁴، و"بطريقة تهكمية يستخدم بعض علماء تحليل الخطاب مصطلحات من الخطابة القديمة، رغم أنهم في أغلب الأحيان يعتبرونه من أحدث الدراسات اللسانية" (كوك، 1989، 12)، علماً أن الدراسات عبر التاريخ لم تخل من دراسة اللغة في السياق، لكنها لم تتجاوز الجملة إلى أن جاءت لسانيات القرن العشرين، واعتبرت اللغة جزءاً من المجتمع والعالم؛ فبرزت دراسات في أمريكا الشمالية اهتمت بلغات الأقليات (الهنود الحمر)، وتأصيلها في الواقع الاجتماعي والثقافي. وفي بريطانيا أثرت دراسات فيرث الذي اهتم باللغة وعلاقتها بالمجتمعات في بلورة رؤية جديدة في الدراسات اللسانية. ولذلك يمكن أن نعتبر هذين المنطلقين من المنطلقات الأساسية التي مهدت لظهور علم جديد على يد زليق هاريس (1952)؛ فكان التحول الأول الرئيسي في لسانيات الخطاب، متجاوزاً بذلك لسانيات الجملة²⁵. وأما بالنسبة إلى براون ويول فإن مصطلح تحليل الخطاب يستعمل استعمالات عديدة ذات معان مختلفة، تشمل أنشطة متعددة حسب المجالات المتنوعة، فهو يستعمل لوصف الأنشطة اللسانية المتقاطعة بين عدة اختصاصات لسانية متنوعة، مثل:

²² تندرج ضمن هذا المسار النصوص الدينية والأدبية والإبداعية بشكل عام.

²³ تندرج ضمن هذا المسار الخطابات الناتجة عن الممارسات الاجتماعية التفاعلية والتواصلية.

²⁴ انظر حول هذه المسألة:

Cook Guy, (1989). Discourse p12

²⁵ انظر كتاب الوصائل في تحليل المحادثة: دراسة في استراتيجيات الخطاب، 2012.

اللسانيات الاجتماعية، واللسانيات النفسية، واللسانيات الفلسفية، واللسانيات الإحصائية²⁶. وقد أدى هذا التشابك بين الاختصاصات إلى طرح أسئلة جوهرية عديدة، من بينها: ما هو تحليل الخطاب؟ ومن يقوم به؟ وهل تحليل الخطاب علم قائم بذاته أم تتجاذبه عدة أطراف؟ وأمام هذا التشابك والتجاذب: ما هو المنهج المتبع في التحليل؟ وهل هو نفسه في كل الاختصاصات؟ ولحل هذه القضية رأى كوك "أن التمييز الناجع يكمن في التفكير بأن الاختصاصات الأخرى تدرس مواضيع أخرى عبر الخطاب، في حين أن تحليل الخطاب يهتم بدراسة الخطاب في المقام الأول، ومع ذلك يمكنه أن يرحل إلى عدة ميادين أخرى مختلفة، مع الحرص الدائم على العودة إلى موضوعه الرئيسي" (1989، 13). من ذلك نستنتج أن الاختصاصات الأخرى يمكنها أن تستفيد من مناهج تحليل الخطاب، دون أن تدعي لنفسها امتلاك هذا الاختصاص، وبهذه الطريقة يضمن تحليل الخطاب استقلاليتته، ويضبط مناهجه وطرق اشتغاله. وكذلك يمكننا تصحيح ما وقعت فيه الدراسات من خلط بين الخطاب وتحليل الخطاب؛ إذ "من المؤكد أن في السنوات الأولى من تحليل الخطاب الفرنسي اهتم اللسانيون والمؤرخون وعلماء الاجتماع بدراسة مفهوم التشكيل الخطابي، وكان تركيزهم حول ما أرساه ميشال بيشو من توجه نحو دراسة الأدبيولوجيات والسياسة" (رينغوت، 2010، 10). فقد أحدثت المفاهيم التي جاء بها فكو وبيشو تشتتاً في الدراسات الفرنسية التي اهتمت بتحليل الخطاب، وأثارت مشكلة التصنيف عند الدارسين خاصة أولئك الذين يحللون الخطابات الصحفية والسياسية والعلمية.

أما في الدراسات الأنغلو سكسونية فيدرس محللو الخطاب الآليات التي تشكل الخطابات من الناحية اللسانية والتفاعلية، وكيفية تناسبها مع الواقع الاجتماعي، فهم يركزون على الطرق التي يستخدم بها الناس اللغة في الحياة اليومية وعلاقة ذلك بعملية التواصل، أي: بالمكان والزمان والتمكلم، وكذلك البحث في طرق الاستخدام اللغوي وعلاقته بالإنتاج والفهم والتأويل. وبصفة عامة يهتمون بثلاثة محاور كبرى، هي: "الاتصال والثقافة والمجتمع" (ماريان يورغنسن، لويز فيليبس، 2002، [2019، 14]). وهم يرون في ذلك أن اللغة لا تحلل أبداً في حد ذاتها، بل تدمج مع أشياء أخرى، مثل: نغمة الصوت، والإيماءات، وتعبيرات الوجه أثناء الكلام، وعلاقة كل هذا بعملية التلفظ. ولذلك فإن تحليل الخطاب قائم على التفسير والتأويل والتشكيل، فالتفسير يعتمد على مقاربات تحليلية تتصل مباشرة ببنية الخطاب اللسانية، ويعتمد التأويل على كفاءة المحلل اللسانية والتواصلية والثقافية والاجتماعية، ويهتم التشكيل بضبط قوانين اشتغال الخطاب وطرق ترميزها رياضياً، أي تحويلها إلى معادلات رياضية حتى تكتسب صفة العلمية، وهذا ما برز في عدة مقاربات ومناهج تحليلية. ولعل أبرز ما ألف في مجال تحليل الخطاب في الدراسات الأنغلو سكسونية كتاب "دليل تحليل الخطاب" الذي قدم للقارئ مقاربات تحليلية متنوعة ورصينة نابعة من دراسات ميدانية مختلفة قائمة على دراسة الاستعمال اللغوي التجريبي الواسع والشامل لاختصاصات مختلفة. فقد برهن المشرفون عليه على هذا الأمر بقولهم: "قادتنا تجاربنا الخاصة في هذا المجال إلى الاقتناع بأن اتساع تحليل الخطاب وتنوعه هما قوة جبارة لا مظهر وهن، وبدل أن يكون التنوع النظري والمنهجي في تحليل الخطاب مغرماً يُذَمَّر منه بسبب عدم وجود نظرية واحدة متماسكة، فقد وجدناه نحن مغتماً. ومن ثم، فإننا نرى هذا الكتاب²⁷ ميسراً لاستخدام الموارد النظرية والتحليلية الكثيرة التي تنتشر حالياً في دراسة الخطاب استخداماً يتعاون فيه اللسانيون وغيرهم ممن يُعنى بدراسات اللغة القائمة على أساس تجريبي." (شيفرن وتانن وهاملتون، 2001 [2022، 30]). ونستنتج من هذا القول أن التنوع الخطابي والمنهجي يشكل دعامة إيجابية تثري عملية التحليل، فتعدد المناهج والمقاربات يجعل المحللين يتعاونون من أجل بناء نظرية شاملة تعنى بجميع أنواع الخطابات في شتى التخصصات، ولذلك نعتبر أن المقاربات البراغمية المتنوعة²⁸ واللسانيات الوظيفية والاجتماعية والنظريات الحجاجية والتواصلية والعرفانية والمناهج التفاعلية والتأويلية والإحصائية والنفسية والاستدلالية وغيرها يمكن الاعتماد عليها في تحليل أي نوع من أنواع الخطاب مهما كان ميدان إنتاجه، شريطة أن يكون المحلل واعياً بالفوارق بين الخطاب والنص وكذلك خصوصيات الشفوي والمكتوب²⁹. كما نرى أن المكتوب الخطابي يختلف عن النص الإبداعي مثلما يختلف على سبيل المثال النص الصحفي عن النص الأدبي؛ فالأول نص خطابي، والثاني نص إبداعي. والمقصود بالنص هنا، هو المشترك البنائي، أي: النسيج الذي به ألف النص، أو قيل الخطاب. ولكن رغم هذا المشترك

²⁶ انظر مقدمة كتاب:

[Brown Gillian & Yule George](#), (1983). *Discourse Analysis*, Cambridge University Press.

²⁷ المقصود هنا هو كتاب "دليل تحليل الخطاب" الصادر بالإنجليزية سنة 2001، وترجم إلى العربية سنة 2022.

²⁸ انظر كتاب: مقاربات برغماتية في تحليل المحادثة: مباحث نظرية وتطبيقية، 2023.

²⁹ انظر حول المقاربات التي تهتم بتحليل النصوص والخطابات وقد جمع منها ستيفان تيتشر وآخرون اثنتي عشر مقاربة في الكتاب التالي:

Titscher Stefan, Meyer Michael, Wodak Ruth, Vette Eva, (2000). *Methods of Text and Discourse Analysis*, SAGE Publications Ltd.

البنائي فإن طرق استخدام اللغة مختلفة، وهو ما يفرض طرقاً متنوعة في الإنتاج تؤدي إلى تنوع طرق المعالجة والتحليل؛ فأفرز ذلك مجالين مهمين في لسانيات ما بعد الجملة، أطلق عليهما الباحثون لسانيات النص، التي تعنى بدراسة النصوص الإبداعية والنقدية، وتحليل الخطاب الذي اعتنى أصحابه بتحليل الخطابات الشفوية أو ذات الطابع الشفوي في الكتابة، أو ما يمكن أن نسميه بالكتابة الشفوية³⁰. وانطلاقاً من هذا التمييز يمكن أن نحدد المقاربات التي يتبعها كل محلل، وفقاً لطبيعة المادة التي يجري عليها التحليل سواء كانت نصاً أو خطاباً. ولهذا نطرح سؤالين جوهريين من هو محلل الخطاب؟، وماذا يحلل؟

تجمع الكتب الرئيسية التي اهتمت بتحليل الخطاب أنّ من يقوم به هو لساني، وعلى وجه الخصوص اللساني ذو التوجه الاجتماعي والنفسي والتواصلية والأنثروبولوجي والبراغماتي، فهذه شروط لا بد أن تتوفر حتى يسمى المحلل نفسه محللاً للخطابات، مهما كان اختلاف مواضيعها ومنطلقات أصحابها التخصصية، وهذا ما أكدّه مؤلفو كتاب " دليل تحليل الخطاب" بقولهم: " إنّ سيرنا الفكرية/ الأكاديمية الخاصة - وجميعها في اللسانيات- تكشف بعض المسارات المختلفة التي أدت بنا إلى الاهتمام بالخطاب." (شيفرن وتانن وهاملتون، 2001 [2022]، 26). وإذا حسنا هذا الأمر وحددنا هوية محلل الخطاب التي نؤكد على أن المنطلق فيها يجب أن يكون لسانياً، ثم نضيف إليه نوعاً من أنواع اهتمامات الخطاب؛ لنحدد ميدان اشتغاله، مثل: الخطاب السياسي، أو الإعلامي، أو الثقافي، أو الاجتماعي، أو التعليمي، إلخ. فإننا نؤكد كذلك - وكما ذهبت إلى ذلك بحوث عديدة - أنّ تحليل الخطاب يندرج في الغالب ضمن مجال اللسانيات التطبيقية؛ إذ "هناك كثير من الأعمال [في تحليل الخطاب]، ولكن ليس في كل الحالات يتم إجراء قدر كبير من تحليل الخطاب من قبل اللسانيين الذين لا يصفون أنفسهم بالمطبقين، ومن قبل كثير من العلماء في التخصصات الأخرى، مثل: علم الاجتماع، وعلم النفس، والعلاج النفسي، على سبيل المثال، الذين لا يسمّون أنفسهم لسانيين. ولذلك فتحليل الخطاب هو جزء من اللسانيات التطبيقية، لكنه لا ينتمي إليها حصرياً. إنه مجال متعدد التخصصات، ونطاق اهتماماته متنوع بشكل كبير" (ترابس- لوماكس، 2004، 133). ورغم هذا التنوع والتعدد في الاختصاصات المهمة بتحليل الخطاب فإنّ المنطلق في التحليل يكاد يكون واحداً، وهو اللسانيات بفروعها والبراغماتية، ولذلك نعتبرهما الأساس الفكري والمنهجي في أيّ عملية تحليل خطابي. وقد ذكر ترابس- لوماكس (2004، 134) عدداً كبيراً من الكتب التي اهتمت بتحليل الخطاب³¹، نستنتج من عناوينها أن مجال تحليل الخطاب هو دراسة اللغة في الاستعمال، بقطع النظر عن نوع الخطاب وانتمائه إلى مجال بحثي معين، مع إمكانية أن نحصر ذلك في اللغة، والمتكلم، والمجتمع، والعلاقات المتشابكة بين هذه الأطراف في عملية الاتصال، وما يحكمها من مؤثرات سياقية وبراغماتية. ومنذ أن توجه البحث اللساني إلى دراسة اللغة في حالة الاستعمال في الحياة اليومية للناس أصبح تحليل الخطاب يهتم بالوقائع اللسانية وغير اللسانية وتحليلها تطبيقياً، ف" يقوم محللو الخطاب بتحليل ما يفعله الناس باللغة في تجاربهم اليومية بطريقة غريزية وبلا وعي إلى حد كبير، فهم يهتمون بالنماذج اللغوية في حالة الاستعمال والملابسات (المشاركون، المقام، الأهداف، النتائج) التي ترتبط بها ارتباطاً وثيقاً. ويمكن دور محللو الخطاب في هذا النشاط العادي في الملاحظة بوعي وتروّ وبشكل منهجي ويقدر الإمكان بموضوعية، حتى ينتجوا حسابات (توصيفات، تأويلات، تفسيرات) لما كشفته تحقيقاتهم". (ترابس- لوماكس، 2004، 133). وهكذا بمثل هذا الضبط المعرفي والمنهجي وتحديد مجالات تحليل الخطاب وتخصصاته طرق تحليله ومنطلقاتها اللسانية وغير اللسانية. ويمكن أن نراجع في ضوء ما تقدم من شروط ومحددات طبيعة هذا الحقل العلمي الحديث،

انظر حول مسألة تدوين الشفوي البحوث الموجودة في كتاب " دليل تحليل الخطاب" وهي التالية: دوغلاس بايبر وسوزان كونراد،³⁰ " اختلاف السجل: مقارنة المدونة، ص218. وجاين أ. إدواردز، "تدوين الخطاب"، ص381.

هذه العناوين التي اهتمت بتحليل الخطاب في التسعينيات من القرن العشرين وبداية القرن الحادي والعشرين³¹

1. Trappes-Lomax, Hugh, (2004). "Discourse Analysis", in *The Handbook of Applied Linguistics* Edited by Alan Davies and Catherine Elder, Blackwell Publishing Ltd, pp133-164.
2. Wedl Juliette, (2007). « L'analyse de discours « à la Foucault » en Allemagne : trois approches et leurs apports pour la sociologie », 2007/2 n° 120, pp35 – 53. <https://www.cairn.info/revue-langage-et-societe-2007-2-page-35.htm>
3. Widdowson, Henry George, (1995). "Discourse analysis: a critical view", in *Language and Literature*, 4(3), pp 157–72.
4. Willig, Carla, (1999). *Applied discourse analysis: social and psychological interventions*. Buckingham, UK: Open University Press.
5. Wilson Adrian, (2012). "What is a text?" In *Studies in History and Philosophy of Science* 43, pp 341–358.

وندفع بالدراسات العربية التي تسم نفسها " بتحليل الخطاب " إلى إعادة النظر فيما تكتب وتحلل، وتطرح التساؤل العلمي الإشكالي في تحديد مسار بحثها، وضبط موضوعه، مقارنة بما يجري في البحوث الغربية الأصيلة، بعيدا عن فوضى الاختصاص؛ حتى نستطيع تأسيس هذا العلم، ونحترم شروط إنتاجه، وضوابطه المنهجية.

7. الخاتمة

كشفت لنا دراسة المصادر المعرفية والأسس المنهجية للخطاب وتحليل الخطاب عن جملة من القضايا تتصل بهما معا، سواء في ضبط المفهوم، أو مجال الدراسة؛ فتبين لنا أنّ المفهوم متسع نتيجة اتساع مصادره المعرفية، وأنّ المنهج متنوع بتنوع الخطابات نفسها، وأدى هذا الاتساع والتنوع إلى وجود اضطرابات في تعريف الخطاب والنص، ودراسات الخطاب وتحليل الخطاب في الدراسات الغربية نفسها، وهو ما جعل المدرسة الفرنسية الأوروبية تختلف عن المدرسة الأنغلو سكسونية؛ فاتسمت الأولى بالتشتت وعدم الوضوح الذي استمر فترة طويلة نسبيا إلى أن بدأت الفواصل تتضح نسبيا بين لسانيات النص وتحليل الخطاب. واتسمت المدرسة الأنغلو سكسونية نسبيا بالوضوح والتمييز بين دراسات الخطاب وتحليل الخطاب. ورغم ما يجمع بينها من مقاربات في التحليل تشترك في المنطلقات اللسانية والاجتماعية والنفسية والأنثروبولوجية والبراغماتية؛ فإن طرق التحليل تختلف أحيانا حسب نوع الخطاب. فقادنا هذا الضبط المعرفي والمنهجي إلى تحديد مجالات الخطاب، ودراسات الخطاب، وتحليل الخطاب، وتعيين من يقوم بها على أسس عملية، أقرها كبار الباحثين المتخصصين في هذا المجال. ونتيجة لهذا التمشي في الضبط المعرفي والمنهجي طرحنا مشكلة البحوث العربية التي قام بها باحثون عرب تحت هذا المجال، ودعونا إلى إعادة ضبطها وفق التخصص الدقيق، بهدف تطويرها، وضبط مسالكها البحثية؛ حتى يتجنب القارئ العربي عبء الاضطرابات المعرفية، والمصطلحية والمنهجية.

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The Crisis of Discourse Analysis between Western Concepts and Arabic Studies

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Abstract

This study aims to engage in uncovering the problematic crisis of discourse analysis and to clarify its key aspects for the Arab reader, enabling them to approach the world of discourse and its analysis through a scientific perspective and within theoretical and methodological conditions that help shape a clear horizon for discourse analysis. It seeks to rescue the field from the confusion that it has fallen into and has become a defining feature of many studies claiming to belong to this domain. In my view, and based on the scientific foundations as established by discourse analysts, many of these studies have no true connection to the discipline beyond misleading titles that confuse readers and deepen epistemological and terminological chaos. Within this framework, I have attempted to establish a terminological vision grounded in the field of discourse analysis itself, hoping to open methodological and epistemological paths for those interested in this area of knowledge. Through the present investigation, I identified subtle distinctions between text, discourse, discourse studies, and discourse analysis. I clarified the nature of the epistemological sources related to each and presented scientific and methodological means for distinguishing between them. This enabled the researcher to define the characteristics of each field, its research focus, and its methods of analysis.

Keywords: text, discourse, discourse studies, discourse analysis, approach, methodology

1. Introduction

Discourse analysis emerged as an academic field within Western research during the second half of the twentieth century, beginning with Zellig Harris's famous article, titled "*Discourse Analysis*" published in 1952. This article had a significant impact on changing the course of linguistic studies, which until then had not gone beyond sentence-level analysis. Subsequently, attention shifted toward discourse and its analysis, marking a new path in research, a path that was one of the fruits of this intellectual transformation. It also led to a reconsideration of the concept of discourse, the procedures for analyzing it, and the levels at which analysis is conducted. These aspects have become relatively clear in Western studies, whereas in Arabic studies, they remain somewhat underdeveloped and undefined. We observe a striking and alarming confusion in the Arab world regarding this academic field, which has become a mixture of various disciplines, each contributing to it, claiming affiliation with it, or even asserting expertise in it. However, this is not quite the case in the foundational Western studies of the field.

In this context, the goal of this research is to present a vision that reveals the foundational epistemological sources of this field and clarifies its methodological principles. We hope to contribute to the clarification of some disciplinary misconceptions and to ease certain difficulties faced by scholars in this area by tracing the field's disciplinary roots in its original sources. From there, we aim to rearticulate the concept of discourse and discourse analysis as

developed in Western studies, and to explain the reasons behind the confusion that permeates Arabic scholarship.

Terms such as *discourse analysis*, *speech linguistics*, and *language linguistics* emerged in the twentieth century. Before that, the academic fields concerned with the study of texts were subsumed under rhetoric and philology. However, the return of linguistics in the second half of the twentieth century to philosophy, history, social sciences, psychology, anthropology, and other fields led to fundamental questions about how to define disciplines, their domains, and points of convergence and divergence. Among the most pressing of these questions were: what is a text, and what is its field? What is discourse, and what is its domain? What is written language, and what is its area of study? What is spoken language, and what are its boundaries? And finally, what are the analytical tools used across all these areas?

Amid these questions, confusion began to take hold among those engaged with texts, discourse, and discourse analysis. This ambiguity compelled researchers to distinguish between these terms and their respective areas of interest. To what extent have studies that label themselves as discourse analysis responded to these disciplinary and terminological distinctions? And to what degree have they managed to define their epistemological sources and methodological foundations? We will answer these and other questions by tracing the trajectories and trends of discourse analysis in both Western and Arab scholarship, in order to identify the most important theories, approaches, and analytical methodologies developed in the field.

2. Epistemological Sources

Since its inception, *discourse analysis* has remained a subject of disagreement, even within the same intellectual school. This was evident in the *French school*, where perspectives and directions began to diverge as early as the 1960s. For instance, Michel Foucault, who devoted significant attention to discourse, saw no relationship between discourse and linguistics. In contrast, Michel Pêcheux (1981), viewed discourse analysis as rooted in Marxist philosophy, psychoanalysis, and structural linguistics. His goal was to use these foundations to deconstruct texts and uncover their ideological and psychological dimensions, focusing on how language is used in real contexts surrounded by a productive context in which meaning is generated.

Discourse analysis was thus seen as an extension of studies concerned with the relationship between language and society, a relationship that involves examining all kinds of texts using linguistic methods in order to understand them and connect them to their social and historical production contexts. This perspective dominated French discourse studies during the 1960s, but gradually began to shift under the influence of American studies, which offered clearer definitions of the field.

The French school came to distinguish between two main directions:

1. A philosophical approach, later known as discourse theory, emerged from philosophy and led by thinkers like Foucault and Pêcheux.
2. A linguistic approach, led by figures, such as Patrick Charaudeau, Catherine Kerbrat-Orecchioni, and Dominique Maingueneau, which focused on analyzing linguistic practices in society. This approach relied on pragmatic frameworks, enunciation theories, and text linguistics to study diverse corpora, political, religious, media-related, conversational, and more.

In contrast, the American school drew from a wider range of epistemological sources, including:

- Anthropology
- Ethnomethodology
- Ethnography of communication
- Conversation analysis
- A focus on the ritualistic and everyday aspects of communication, as seen in the work of Erving Goffman (1981).

From this, it becomes clear that the epistemological foundations of the two schools differ significantly, which inevitably leads to conceptual inconsistencies and difficulty in defining the field. This disparity in the conceptualization of discourse analysis is also rooted in how each school defines discourse itself, depending on the scholars' intellectual frameworks whether philosophical (theoretical) or empirical (concerned with how language functions in use). Linguists tend to adopt the latter approach, viewing discourse as language in use. From a formal perspective, discourse extends beyond the word, phrase, or sentence, and is connected to communicative processes on a cognitive level.

2.1 What Is a Text?

Dictionary definitions of the term *text* tend to focus predominantly on its formal aspects. In *Lisan al-Arab*, Ibn Mandūr defines text as “elevation and manifestation; placing one thing over another; reaching something to its utmost extent; movement and designation toward something; and suspension or specification” (Ibn Mandūr, 1994, p. 361).

Western dictionaries, both French and English, define the text as “a group of terms and sentences that constitute a piece of writing or a written work”³², more precisely; the French dictionary outlines the following meanings:

1. A structural unit of writing
2. A literary work or part of one
3. The printed or written portion of a page (as opposed to the blank or marginal areas)
4. Content or precise formulation (e.g., the text of a decision or a ruling)
5. A topic or exam passage³³

The English Collins Dictionary³⁴ defines *text* as:

1. A book or its main content, excluding the introduction, illustrations, or notes
2. Any written material
3. The written version of a speech, broadcast, or recording
4. A book or another written work, especially one related to learning and scholarship

From these definitions, it becomes clear that they all associate the concept of a text primarily with writing. Some definitions go further by narrowing the term to refer specifically to literary works, thus limiting the concept to literary or artistic texts, or parts thereof.

In contrast, linguistic studies that focus on the concept of *text* generally associate it with both formal features and the reader. In such studies, a text is viewed as a sequence of words, phrases, or sentences that are grouped together into a segment of a written work in varied forms and structures—regardless of length—with the aim of conveying a set of meanings to the reader.

³² *Dictionnaire de Français Larousse*: <https://www.larousse.fr/dictionnaires/francais/discours/25859>

³³ *Dictionnaire Français Définition. Définitions, exemples, synonymes et expressions.* https://dictionnaire.reverso.net/francais_definition/text%C3%A9

³⁴ *Collins English Dictionary*: <https://www.collinsdictionary.com/dictionary/english/discourse>

The forms and media of texts differ widely; they may include books, magazines, newspapers, internet content, drawings, advertisements, artworks, and other symbolic representations.

The concept of text evolved significantly in the late 1960s, especially with the emergence of *text linguistics* in France and Europe more broadly. In 1967, Jacques Derrida declared that “there is nothing outside the text,” and in 1968, Roland Barthes famously announced the “death of the author,” thereby challenging the traditional notion that emphasized the primacy of writing and the authority of the author. As the works of Barthes, Derrida, and others were translated into English in the mid-1970s, the concept of the text began to expand to include the conditions for *textuality* itself. It opened up to cultural dimensions and began to be viewed in critical studies as an integral part of social life (Wilson, 2012).

The term *text*, derived from the Latin verb *texere* and the noun *textum* (meaning, “what is written”), was originally associated with sacred writings or scholarly compositions, and was closely linked to the ideas of *texture* and *construction*. This understanding of text persisted into the 19th century. However, by the 20th century, it came to be defined by literary quality and genre, and texts began to be categorized as argumentative, descriptive, narrative, expository, dialogic, dialectical, etc.

With the development of textual linguistic and critical theories, further criteria were added, such as the importance of the reader, and the cultural and intellectual context. Some scholars even began to describe texts as either written or spoken in recent years, which led others to equate *text* with *discourse*. This created an overlap between the two terms, causing many scholars engaged in analyzing literary and other written texts to believe they were analyzing discourses (Fairclough, 2003). However, the distinction between *text* and *discourse* lies in several specific details that must be clarified by first defining the concept of *discourse* itself—so as to avoid confusion and resolve this ambiguity.

2.2 What is Discourse?

In general, usage, the term *discourse* in dictionaries refers to any spoken language concerning a specific topic, delivered by a speaker before an audience in either a formal or an informal setting. Linguistically, discourse is defined as the language used by a speaker in a real communicative situation, that is, spoken language in the Saussurean sense. It refers to any utterance that goes beyond the sentence level and, structurally speaking, is a continuous sequence of sentences.

Discourse is also defined as natural spoken, (Stubbs, M, 1983) or written communication between people within a given context. It is often synonymous with terms such as *conversation*, *talk*, *discussion*, or *speech*. According to some linguists, the term *discourse* has its roots in classical rhetoric, where it primarily referred to spoken production (Crystal, 2008, p. 148).

In the Arabic tradition, the concept of discourse is tied to the notion of dialogue or interaction. As defined in *Lisan al-Arab*, discourse is: “an exchange of speech; to address someone verbally is to engage in “muxaṭaba” (conversation or discourse)” (Ibn Mandūr, entry: “xaṭaba”, 1994, p. 361). This definition aligns with what modern linguistics proposes: “Discourse is a mutual exchange between at least two people; it is a dynamic act of enunciation situated in time and place, carried out by individuals through both verbal and non-verbal means” (Missaoui, 2015, p. 178). From these definitions, it becomes clear that discourse is primarily characterized by its oral nature, with all the procedural and performative constraints this entails. It typically involves two interlocutors, *I* and *you*, who produce an utterance that exceeds the sentence in length.

However, some scholars extend the concept of discourse to include written forms as well, effectively equating it with *text*. In this view, any spoken discourse can be transformed into a written text under specific discursive conditions and characteristics. Examples include written forms of blame, apology, praise, accusation, defense, as well as legal and administrative documents, political statements, religious sermons, and more. These are all written texts that maintain an oral character, making them easily convertible from spoken to written forms and vice versa. Source? Such forms of discourse are deeply rooted in communicative acts between interlocutors—in the actual, interactive communicative situation, involving a specific context and a particular audience comprising both producers and receivers simultaneously.

There is no standard way to write discourse; each type of discourse has its own writing conventions depending on its genre, context, communicative objectives, and subject matter. As a result, the term *discourse* is usually specified with a qualifying adjective that identifies its type and communicative domain, for example: *political discourse*, *religious discourse*, *critical discourse*, *media discourse*, *social discourse*, *cultural discourse*, *educational discourse*, *philosophical discourse*, and so on.

3. Discourse in Philosophical and Critical Studies

Discourse studies were preceded by inquiries concerned with the *philosophy of language*, most notably pioneered by thinkers, such as Ludwig Wittgenstein, Mikhail Bakhtin, and Michel Foucault. However, “their contributions only addressed part of this vast field, and none of them, under any name, carved out a domain that would comprehensively encompass the current scope of discourse analysis” (Maingueneau, 2014, p. 3). From this idea, we understand that there is a distinction between discourse studies, rooted in philosophy, especially the work of French philosopher Michel Foucault, and those within the field of literary and critical theory that emerged under the umbrella of *post-structuralist studies*.

Foucault (1971) associated the concept of discourse with history, knowledge, the history of science, power and will, surveillance, punishment, sexuality, and morality. He drew on historical, archaeological, and philosophical analyses, viewing language as producing two kinds of speakers: one explaining raw language and another interpreting what is hidden in the depths of texts. In his view, “language exists first in its raw, primitive form [...] but it soon allows for the emergence of two other kinds of discourse that surround it from all sides: above it, the explanation that restates the given in new speech, and beneath it, the text that presumes the explanation’s priority hidden beneath signs visible to all” (Foucault, 1990, p. 58).

Foucault defines discourse as “sometimes the general field of all utterances (*énoncés*), sometimes a specific group of utterances, and sometimes a practice governed by rules which descriptively referring to a number of utterances and indicating them” (Foucault, 1986, p. 78). From this, it appears that the utterance is central to discourse, serving as its foundational element. The utterance distinguishes discourse from other similar groupings, such as written texts. An utterance can be transcribed, written down, and repeated, i.e., transformed from oral to written form—according to agreed-upon methods and frameworks. Thus, the utterance is the primary signal for any analytical process involving language and social life.

Foucault argues that discourse lies in the relationship between the name and the named, i.e., the articulation between the two. The name in isolation is not representative, nor is the named; they belong to the system of language. When an articulation between them occurs, discourse emerges. Therefore, discourse’s task is to assign names to things: “for the word to express what it expresses, it must be embedded in a universal grammatical system that precedes and determines it” (Foucault, 1990, p. 236). Yet, for something to qualify as discourse, it must be embedded in a discursive formation that defines its domain and sets the rules for its historical

and social operation, within the framework of Foucault's *Archaeology of Knowledge*. This domain is characterized as the actual practice of utterances, i.e., what is spoken or what speech act theory refers to as speech acts.

For this reason, discourse is tied to a formative system, which "is neither a fixed framework nor a static form imposed on discourse" (Bougoura, 2000, p. 109). Each discourse has its own formative system, constituting part of its self-formation and distinguishing it from written texts, which are typically categorized into established genres, such as story, novel, autobiography, or poetry.

Moreover, Foucault's concept of discourse is linked to practice, which is founded on "a set of specific and historically defined objective rules, always situated in time and place that were determined during a specific period and within a particular social, economic, geographical, or linguistic scope" (Foucault, 1986, p. 113). Hence, discourse is a practice tied to the producing subject (i.e., the speaker) and the conditions of its production. In other words, the practice must be related to place, time, language, and the economic and social conditions constraining the process of production. According to Corneliu (2014), this practice is governed by strategies of discourse.

Foucault (1967) is not concerned with the structural formation of discourse nor with the emergence of meaning itself; he is rather interested in the transformations of meaning or its suspension to show something new, he is concerned with how the speech is working in a specific historical stage. He focuses on how discourse functions in a specific historical phase, relying on the contrast between discursive language and non-discursive language, aiming to define discourse as a philosophical theory based on the analysis of ideas. According to Bougoura (2000),

discourse, utterance, and discursive formations are incompatible with what we traditionally call, within the history of thought, the text, the work, the proposition, the sentence, the scientific field, or the scientific discipline; these concepts, according to Foucault, are related to the illusion of communicative ideas. What he seeks to establish is a history of discontinuities and ruptures; hence, he relied on the concept of discourse as a historical event marked by separation and rupture. (p. 113)

Thus, discourse analysis, for Foucault, "is not limited to linguistic words, nor is it confined to the internal realm of language... discourse is necessarily something that goes beyond language" (Foucault, 1986, p. 39). For this reason, Foucault devised his own analytical method called archaeology, which entails digging and excavating in the utterances of the archive, both in terms of internal and external structure. His method involves uncovering how discourse is formed and how it emerges into being. Discourse analysis, in his approach, is an archaeological analysis of the utterance as a speech event capable of being recorded and repeated, distinguishing it from literary or scientific works, which he excluded from the domain of discourse analysis. In this regard, Ringoot (2010) points out:

In this pre-determined perspective, the supposed divisions between Foucault's intellectual phases, especially those that differentiate between literature/discourse, politics/power, and ethics/subjectivity, remain consistent, yet they do not exhaust the possibilities for other interpretations that may be less aligned with internal and external disciplinary divisions or the sector-based categorization expected according to the topic of research. (p. 11)

From the above, we can conclude that the concept of discourse, in the philosophical and critical perspective, is closer to the concept of statement—that is what language and thought

allow in terms of producing spoken or written discourses—than it is to the concept of conversation, which is built on interaction and the shared production of live verbal exchange, which is the realm of discourse analysis (Widdowson, 1995). For this and other reasons, linguistics distinguishes between “discourse studies”, which are philosophical and critical endeavours examining the methods of thought production and critique, and “discourse analysis”, which is a linguistic and social enterprise concerned with identifying the rules governing conversation or dialogue and the linguistic and non-linguistic mechanisms for its analysis.

4. Discourse in Linguistic Studies

The concept of discourse was first associated with linguistic studies by Buysens in (1943). It began to take various directions in the second half of the 20th century, particularly after Zellig Harris's article (1952), which opened a new path in linguistic studies focused on text linguistics in Europe and discourse analysis in American linguistic studies. Consequently, scholars distinguished between two schools of discourse analysis: the French (European) school and the American (Anglo-Saxon) school. Within this framework, a distinction was made between *discourse* and *discourse analysis*.

Foundational studies on the concept of discourse in linguistics emerged across several directions, most notably in the works of Roland Barthes in the years 1964 and 1966. Barthes considered that “to define discourse, we must go beyond the linguistic to the trans-linguistic, dealing with research material such as myth, narrative, and cultural artifacts, provided they are transformed into spoken language” (Barthes, 1964, p. 81). Here, orality appears as a crucial condition in the definition of discourse. Barthes later developed this definition to focus on the formal aspect, stating that “discourse is a large sentence ... just as a sentence is a small discourse” (Barthes, 1966, p. 3). From this, we understand that, for Barthes, discourse is spoken language that could be a small or large sentence.

For Émile Benveniste, discourse represents a level of meaning that must be studied in relation to language, as it cannot be separated from the linguistic sign that produces and interprets it (Benveniste, 1974, p. 50). Therefore, in enunciation theory, discourse became associated with both the internal system of language and the external world referring to the speaker. That is, it relates to both the linguistic and the non-linguistic, making the speaker (or enunciator) a fundamental element in the formation and analysis of discourse.

In American (Anglo-Saxon) linguistics, the concept of discourse was tied to field-based empirical studies within the frameworks of sociolinguistics, anthropology, ethnography of communication, interactional linguistics, and the sociology of language. These studies (Missaoui, 2023) rely on recording conversations and analysing them from various methodological perspectives. Thus, the concept of discourse was defined on linguistic and social grounds, provided it is used in real contexts. Norman Fairclough emphasized this when he stated, “when using the term of discourse, I propose to preserve the notion of language in use as a form of social practice” (Fairclough, 1992, p. 16). In this way, linguistic activity became linked to social and cultural activity, and to the influences and contextual and pragmatic constraints that the environment imposes on the processes of production, understanding, and interpretation.

From the aforementioned views and definitions, we can deduce that the origin of the discourse concept in the French/European school lies in philosophical, critical, and linguistic thought, and includes both oral and written forms. In this school, written discourse is often considered as originally spoken language that has been transcribed, such as myths, tales, and historical accounts. By contrast, in American linguistics, discourse is based on social, cultural,

and linguistic premises, and is understood as direct spoken usage that is studied through real-life speech communities in various research domains.

5. The Relationship between Discourse and Discourse Analysis

From a linguistic perspective, discourse precisely engages with three major oppositions that help define its concept: discourse versus sentence, discourse versus language, and discourse versus text. Discourse is thus a linguistic unit that quantitatively exceeds the sentence and conceptually relates to language use. According to Maingueneau (2014), discourse has the following defining characteristics:

1. It is a linguistic unit that goes beyond the sentence.
2. It has an actual form, such as speech acts.
3. It is an interactive form involving two or more participants engaged in oral exchange.
4. It is produced within a context.
5. It is anchored to the speaker (I / now / here).
6. It is governed by rules (laws of discourse, conversational rules, and conversational maxims).
7. It is studied in relation to the interweaving of discourses (issues of understanding and interpretation).
8. It constructs meaning socially; that means it a meaning production is subject to social practices.

As a result, philosophical and linguistic approach characteristic of the French school, discourse theory emerged from philosophical debates interested in language. This theory differs from discourse analysis in the strict sense. Discourse theory focuses on cultural projects that mix in various ways concerns related to post-structuralism, cultural studies, and constructivism. It raises questions related to human and social sciences, particularly regarding the self, meaning, power, sexual difference, writing, dissension, and post-colonialism.

In this context, a distinction was made between discourse studies, which concern issues related to discourse, and discourse analysis, which focuses on actual linguistic events. Thus, the questions posed by discourse studies differ from those posed by discourse analysis: the former deals with intellectual and philosophical issues, as raised by Foucault (1967), and others in the French school or by Cook-Gee (1989) and James Paul Gee (1999) and others in the Anglo-Saxon school. The latter deals with examining the structural features and functional uses of language in conversation as it occurs in reality, as approached by the American school, (Schiffrin, 1994). Hence, according to the authors of *The Handbook of Discourse Analysis*, “the definitional issues associated with discourse and discourse analysis are by no means unique” (Schiffrin, Tannen & Hamilton, 2001, p. 2).

A third confusion arises between discourse and text due to the lack of precise awareness distinguishing their specific features, given the complex relationship between them that only specialists can unravel. Text and discourse share structural aspects such as cohesion, coherence, reference, implication, and syntax. However, discourse differs from text in adding oral social activities such as gestures, communicative spaces, gaze, intonation, and the relationships between speakers.

Some texts belong to the discourse genre because they are communicative texts, such as advertisements, announcements, and newspapers. Other texts do not belong to the discourse genre, such as religious, literary, and documentary texts. Even if literature is considered a form of discourse, it follows the traditional division in literary studies: one branch focuses on the text itself, and another focuses on the context in which the text was produced, its author, and the

historical period. This latter branch is closer to content analysis, which extracts meaning from documents, leading to the emergence of text linguistics. Therefore, discourse analysis does not study literary works that form a pre-existing corpus, such as poetry collections and literary works. Rather, it studies conversations, discussions, and live television dialogues, etc.

Consequently, text and discourse differ according to the nature of the corpus: text corpora are pre-prepared, while discourse corpora are spontaneous and subject to transcription and documentation according to specific, agreed-upon scientific methods. Thus, the subject of discourse analysis is not how texts work or the communication situation itself, but what links them through the enunciative apparatus, which is related to both oral and institutional contexts.

Hence, the linguistic and social dimensions together constitute the field of discourse analysis and cannot be separated; otherwise, working on discourse would stray far from discourse analysis. Based on this view, the problems related to text, discourse, and discourse analysis can be resolved by relying on the corpus analyzed within each specialized field. Therefore, Arabic studies, which suffer from terminological confusion and lack of distinction between specializations, should reconsider their frameworks and refine their fields according to scientific criteria, not personal whims or ideological tendencies.

6. Methodological Foundations of Discourse Analysis

Approaches to discourse analysis vary according to the diversity of discourse types. Each type of discourse can be analyzed with an approach suited to it, with the discourse itself always as the starting point. For example, the approaches used in analyzing political discourse differ from those used for analyzing spontaneous, informal conversation, and the same applies to other types, (Sinclair, J. M., & Coulthard, M., 1975). However, this diversity of discourses and analytical approaches is not isolated from some common constants, such as the speaker or participant, the context, the enunciative situation, interaction, and communication. To set the methodological foundations of discourse analysis, we must first define it, specify its scope, and determine who conducts the analysis.

6.1 What is Discourse Analysis?

Linguistic studies in the twentieth century, especially in its second half, divided into two main approaches: one that studies language as a symbolic coded system (language code), and another that studies language in relation to reality and society (language discourse). If we accept these two different approaches to researching the language system and its organization, it would be inaccurate to consider the second approach, namely discourse analysis, as entirely new without any roots connected to past linguistic studies.

Ancient Greek and Roman scholars were aware of this distinction; they separated rhetorical studies (or rhetoric) from grammatical studies. This view persisted in linguistic studies that examined grammatical rules abstractly, without context, until the emergence of speech act theory, which posed central questions: How do we do things with words? How do we accomplish facts and effects, and achieve successful communication with others in different contexts?

Ironically, some discourse analysts use terms from classical rhetoric, although they mostly consider discourse analysis a modern linguistic field (Cook, 1989, p. 12). Historically, language studies were not devoid of contextual considerations, but they rarely went beyond the sentence level until twentieth-century linguistics emerged, which regarded language as part of society and the world. This led to studies in North America that focused on minority languages (such as those of Native Americans), embedding them in social and cultural realities. In Britain,

studies by scholars like J.R. Firth, who explored language's relation to society, shaped a new vision in linguistic studies. Thus, these two foundations paved the way for the emergence of a new science by Zellig Harris (1952), marking the first major shift in discourse linguistics beyond sentence linguistics.

Regarding Brown and Yule (1983), the term “discourse analysis” is used with many meanings, covering diverse activities across multiple linguistic fields, such as sociolinguistics, psycholinguistics, philosophical linguistics, and computational linguistics. This overlap of specialties raised fundamental questions: what is discourse analysis? Who practices it? Is it a distinct science, or is it drawn by multiple disciplines? Given this complexity, what methodology does it follow? Is the methodology uniform across fields?

To address this, (Cook, 1989, p. 13) argued that a useful distinction is to think of other disciplines as studying other topics through discourse, while discourse analysis itself focuses primarily on the study of discourse, though it may migrate into various other fields — always ensuring a return to its main subject.

From this, we infer that other disciplines can benefit from discourse analysis methods without claiming the discipline itself, thus preserving discourse analysis's independence and defining its methods and operations. We can also correct the confusion between “discourse” and “discourse analysis” found in some studies.

In the early years of French discourse analysis, linguists, historians, and sociologists focused on the concept of “discursive formation,” especially inspired by Michel Foucault's approach to ideology and politics (Ringoot, 2010, p. 10). The concepts introduced by Foucault and Pêcheux caused fragmentation in French discourse studies, especially among those analyzing political, journalistic, or scientific discourses.

In Anglo-Saxon studies, discourse analysts examine the mechanisms that form discourses linguistically and interactively; and how they align with social reality. They focus on how people use language in daily life and how this relates to communication considering place, time, and speaker as well as investigating linguistic usage in relation to production, comprehension, and interpretation. Generally, they focus on three major themes: communication, culture, and society (Jørgensen & Phillips, 2019, p. 14). They view language as never analyzed in isolation but integrated with other elements like tone of voice, gestures, facial expressions during speech, and their relationship to utterance processes.

Thus, discourse analysis is based on interpretation, hermeneutics, and formation. Interpretation depends on analytical approaches directly related to the linguistic structure of discourse, (Courtine & Marandin, 1981). Hermeneutics relies on the analyst's linguistic, communicative, cultural, and social competence. Formation deals with formalizing the operating rules of discourse and encoding them mathematically to achieve scientific rigor, which has appeared in several analytical approaches.

One of the most notable works in Anglo-Saxon discourse studies is *The Handbook of Discourse Analysis*, which offers the reader a variety of rigorous analytical approaches based on broad experimental linguistic usage across different disciplines. The editors affirm:

Our own experiences in the field have led us to the conviction that the vastness and diversity of discourse analysis is a great strength rather than a weakness. Far from its being a liability to be lamented because of the lack of a single coherent theory, we find the theoretical and methodological diversity of discourse analysis to be an asset. We thus envision this volume as fostering the cooperative use, by linguists and others interested in empirically grounded studies of language, of the many theoretical and analytical

resource currently proliferating in the study of discourse. (Schiffrin, Tannen & Hamilton, 2001, p. 5)

From this, we conclude that the diversity of discourse and methodology enriches analysis. The multiplicity of approaches encourages analysts to collaborate in building a comprehensive theory that addresses all discourse types in various fields. Pragmatic, functional, sociolinguistics, argumentative, communicative, conversational, interpretative, statistical, psychological, and inferential approaches. According to Titscher, Meyer, Wodak, Vette (2000), these approaches can all be used to analyze any kind of discourse, regardless of the production field, provided the analyst is aware of the differences between discourse and text, and the particularities of oral and written forms.

Written discourse differs from creative texts, just as journalistic texts differ from literary texts (Chiss, 2005). The “text” here refers to the structural commonality, the fabric from which the text or discourse is composed. Despite this structural similarity, language usage varies, requiring diverse production methods that lead to varied analytical and treatment approaches. This has resulted in two important fields in post-sentence linguistics: text linguistics, which studies creative and critical texts, and discourse analysis, which analyzes spoken or speech-like texts, or what can be called oral writing. Based on this distinction, analysts adopt approaches according to the nature of the material analyzed, whether text or discourse.

This leads to two essential questions: Who is the discourse analyst? What do they analyze? The main discourse analysis books agree that analysts are linguists, especially those with social, psychological, communicative, anthropological, and pragmatic orientations (Gadet & Marandin, 1984). These are necessary conditions for one to call oneself a discourse analyst, regardless of the topics or disciplinary backgrounds of the discourse analyzed. The authors of *The Handbook of Discourse Analysis*, who say, confirm this: “Our own intellectual/academic histories – all in linguistics – reveal some of the different paths that have led us to an interest in discourse” (Schiffrin, Tannen & Hamilton, 2001, p. 2).

If we fix this and define the discourse analyst’s identity, emphasizing a linguistic basis, and then add one or more discourse-related interests (political discourse, media discourse, cultural, social, educational, etc.), we also affirm, as many studies have, that discourse analysis generally falls within applied linguistics. Indeed, Trappes-Lomax (2004) states that:

Much discourse analysis work exists, but not always conducted by linguists who call themselves applied linguists, and by many scholars in other fields like sociology, psychology, psychotherapy, who do not call themselves linguists. Therefore, discourse analysis is part of applied linguistics, but not exclusively. It is an interdisciplinary field with a wide scope. (p. 133)

Despite the diversity of disciplines interested in discourse analysis, the primary basis in analysis is linguistics and pragmatics (Cutting, 2002). Hence, they are the intellectual and methodological foundation of any discourse analysis process.

Trappes-Lomax (2004) lists many books on discourse analysis, from which we infer that the field is the study of language in use, regardless of discourse type or research domain, potentially focusing on language, speaker, society, and their intertwined relationships in communication, governed by contextual and pragmatic factors.

Since linguistic research turned to studying language in real-life usage, discourse analysis has been concerned with analyzing linguistic and non-linguistic events practically. In this regard, Trappes-Lomax (2004) points out:

Discourse analysts analyze what people do with language in their daily experiences, often instinctively and unconsciously. They focus on language patterns in usage and the circumstances (participants, setting, goals, and outcomes) closely related to them. The role of discourse analysts is to observe consciously, carefully, systematically, and as objectively as possible to produce accounts (descriptions, interpretations, explanations) of their investigations. (p. 133)

Thus, with such cognitive and methodological precision and such definition, the scope and specializations of discourse analysis and its linguistic and non-linguistic foundations and methods, we can revisit the nature of this modern scientific field. We urge Arab studies calling themselves “discourse analysis” to reconsider their writings and analyses, question their scientific and problematic research paths, and control their topics compared to authentic Western research, far from disciplinary confusion, to establish this science with respect to its production conditions and methodological standards.

7. Conclusion

The study of the knowledge sources and methodological foundations of discourse and discourse analysis revealed a number of interconnected issues related to both the concept and the field of study. It became clear that the concept is broad due to the expansion of its knowledge sources, and the methodology is diverse because of the variety of discourses themselves. This breadth and diversity have led to confusion in defining discourse and text, as well as in studies of discourse and discourse analysis within Western scholarship itself. This has caused the European French School to differ from the Anglo-Saxon school; the former was characterized by dispersion and lack of clarity that lasted for a relatively long period until clearer distinctions emerged between text linguistics and discourse analysis. The Anglo-Saxon School, in contrast, has been relatively clearer and more distinct in differentiating between discourse studies and discourse analysis.

Despite shared analytical approaches grounded in linguistic, social, psychological, anthropological, and pragmatic foundations, their methods sometimes differ depending on the type of discourse. This cognitive and methodological clarification led us to define the fields of discourse, discourse studies, and discourse analysis, as well as to specify who conducts them based on practical foundations established by leading specialists in this domain. As a result of this precise cognitive and methodological approach, we addressed the issue of Arab research conducted under this field, calling for its reorganization according to precise specialization with the aim of developing and regulating its research pathways. This would help Arab readers avoid the burden of cognitive, terminological, and methodological confusion.

Generative Artificial Intelligence (AI)

Artificial Intelligence has been used to translate the Arabic version of the chapter into English.

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Part I

Contributions in English

Linguistics

Prosody in Action: An Analytical Review of Its Role in L2 Discourse and Communication Crisis Resolution

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Abstract

While prosody has been acknowledged as central to spoken communication, its role in second language (L2) and multilingual discourse remains underexplored, particularly beyond the sentence level. Apart from its effect on individual sentences, prosody contributes to extended discourse by structuring information, guiding interpretation, and preventing communication breakdowns. Most research has focused on the impact of prosody on intelligibility, comprehensibility, and accentedness. Yet, the function of prosody in structuring extended discourse, managing communicative intent, and resolving ambiguity in real-time interaction has received less attention. This analytical review chapter presents an attempt to address the multifaceted role of prosody in L2 discourse production and perception. It brings together insights from phonetics, applied linguistics, and discourse analysis to highlight how disciplinary division has hindered comprehensive understanding and pedagogical application. Through a synthesis of current research and key contributions, the chapter calls for a more integrated, discourse-sensitive approach to prosody in research and L2 instruction.

Keywords: Prosody, L2 discourse, multilingual discourse, crisis resolution, disciplinary division

1. Introduction

Prosody—also known as suprasegmentals, involving concepts such as stress, intonation, and rhythm—plays an essential role in shaping spoken communication across languages. It not only conveys grammatical and pragmatic meaning but also influences how listeners perceive and interpret speech, particularly in second language (L2) and multilingual contexts. In L2 pronunciation research, prosodic features have been closely linked to key constructs such as intelligibility, comprehensibility, and accentedness, all of which affect successful communication. Yet, beyond sentence-level effects, prosody proves indispensable in extended discourse, where it guides listener expectations and aids in resolving ambiguity or potential communication breakdowns. Despite its significance, prosody remains underrepresented in applied linguistics pedagogy and discourse-based approaches to language study. It is often siloed within phonetically or phonologically oriented frameworks. This disciplinary divide hampers cohesive advancements in both research and teaching. Meanwhile, a growing body of work, from scholarly journals mainly, is beginning to bridge these gaps by highlighting prosody's role in discourse-level interaction and crisis negotiation. This chapter attempts to survey the evolving landscape of prosody research analytically, aiming to synthesize methodologies and findings across disciplines and highlight patterns, gaps, and emerging trends. It emphasizes pedagogical potentials and proposes future directions that prioritize cross-disciplinary collaboration, explicit integration into L2 instruction, and deeper exploration of prosody's role in modern real-world communication.

2. Understanding Prosody: Its Elements and Significance in Language

Languages are composed of much more than sequences of discrete sounds, such as consonants and vowels, generally referred to as segments. They are also shaped by suprasegmental features. These features include elements beyond the segment like intonation, stress, rhythm, and pitch that are collectively known as *prosody*. Prosody is believed to provide necessary information beyond the lexical and grammatical content of speech utterances. It refers to the patterns of rhythm, stress, and intonation in speech (Crystal, 2003). Prosodic features, thus, are the phonetic features that overlay or extend over segments and influence how they are produced and perceived. Intonational patterns, for instance, refer to pitch fluctuations (rises and falls) across phrases and sentences, serving to signal the attitudes and the emotions of the speaker, as well as to distinguish sentence types (e.g., question vs. statement). Prosody also encompasses the concept of lexical stress, which refers to the relative prominence placed on certain syllables or words. It includes sentence or phrasal stress, which is the emphasis placed on certain words in a phrase or a sentence to highlight them, affecting meaning and sentence rhythm. Rhythm refers to the timing and pattern of speech sounds, often linked to the alternation of stressed and unstressed syllables. Prosody also comprises tones, juncture, and vowel reduction, the roles of which vary from one language to the other. Jointly, these elements, as well as some other language-specific components, constitute the prosodic system of a language. Without them, speech can sound monotonous, mechanical, and even ambiguous.

Although universal, prosody manifests differently across languages. Some languages use *pitch accent* (e.g., Japanese), where pitch placement helps distinguish words, while *tone languages* (e.g., Mandarin, Yoruba) use pitch variations that can be phonemic and aid in differentiating word meanings utterly (Yip, 2002). However, non-tone languages, such as English, use intonation mainly for grammatical and pragmatic functions rather than to encode lexical contrast. *Rhythm* varies across languages as well. English and other Germanic languages are considered stress-timed, indicating that stressed syllables occur at regular intervals of time. In contrast, syllable-timed languages, like Spanish and French, have nearly equal duration per syllable (Abercrombie, 1967). This affects how speakers of one language may perceive the rhythm of another.

The role of pitch—acoustically measured as fundamental frequency (F0 in Hz)—in conveying information status is language-dependent. It is generally shaped by the interaction between prosody and syntactic structure. In Germanic languages such as English and Dutch, where word order is relatively rigid, prosodic cues play a prominent role in signaling focus and discourse-new information. In contrast, Romance languages, like Spanish and Italian, rely more heavily on word order to mark such distinctions (Donati & Nespor, 2003). Dutch listeners are reported to be sensitive to gradations in prosodic prominence and can infer prior discourse contexts based on pitch accent patterns, whereas Italian listeners are reported to be less responsive to these prosodic features (Swerts et al., 2002).

Different uses of acoustic cues and differences in prosodic typologies are also believed to affect learners of these languages. In English, prosody helps signal sentence types, focus, and emotional nuances. It further contributes to the expression of affective meaning and speaker stance. Specific intonational contours, like the Rise-Fall-Rise in American English, can convey speaker uncertainty or astonishment. This contour, consisting of a rising pitch accent followed by a continuation rise, communicates nuances of speaker attitude and functions as a form of conventional implicature (Ward & Hirschberg, 1985). Prosody can also indicate impoliteness or sarcasm, as demonstrated by Culpeper (2011), who notes that unexpected prosodic patterns—such as using falling intonation in yes/no questions—can prompt listeners to infer socially

marked meanings. Prosody encodes illocutionary force, too. Intonational features such as pitch accents, phrase accents, and boundary tones form complex F0 contours that signal a speaker's intent, such as making a statement or posing a question (Beckman & Pierrehumbert, 1986; Gussenhoven, 1984; Pierrehumbert & Hirschberg, 1990). Prosody also serves as an important interactional resource in managing dialogue. One notable use of prosody is in coordinating turn-taking through pitch alignment, a phenomenon termed 'tone concord' (Brazil, 1985; Wennerstrom, 2001). Speakers often begin their turn at a pitch level that aligns with the end of the previous speaker's utterance, signaling agreement or affiliation. In contrast, mismatched pitch levels may convey disagreement or emotional distancing. Prosody operates in combination with other linguistic and contextual cues, rather than serving as an isolated signal (Sridhar, Bangalore, & Narayanan, 2009). As such, it plays a key role in facilitating both the perception and production of discourse. Given the variability of audience backgrounds and the diversity of contextual cues, discourse is inherently open to multiple interpretations (van Dijk, 1997). Prosody, therefore, serves as an important interpretive guide within this complex communicative landscape, helping speakers and listeners navigate meaning more effectively.

For non-native learners of languages, mastering suprasegmentals is essential. Unfortunately, this skill has been generally neglected in both language teaching practice and research on second language acquisition and learning, in contrast to other domains like vocabulary learning and morpho-syntax. Indeed, Major (1998) observed that "of the nearly 200 articles published in *Studies in SLA* [from 1988 to 1998], only about a dozen focused on phonetics and phonology" (p.131). This neglect derives from the widely held assumption that second language (L2) phonological elements, including both segmental sounds and prosodic patterns, present significant acquisition challenges. The difficulty in perceiving and accurately reproducing these foreign language sounds and prosodic features has traditionally been attributed primarily to physiological constraints, particularly among adult learners who are believed to experience a decline in neuroplasticity of the articulatory system with advancing age (Lado, 1957). Furthermore, this marginalization of L2 phonological accuracy was further entrenched by the advent of the Communicative Approach (Terrell, 1989), which posited that learners could achieve effective communication without the necessity of precise pronunciation or prosodic mastery.

Fortunately, since the late 90s, L2 phonology acquisition research has expanded and has become a broad area of interest. Different theoretical frameworks—such as the Speech Learning Model (SLM, Fledge, 1995) and the Perception Assimilation Model (PAM, Best & Tylor, 2007)—were advanced to understand the various factors that affect the acquisition of the sounds and the prosody of a second language, and which turned out to be not only physical but essentially cognitive. Indeed, the cognitive processes behind L2 phonological development are considered complex and difficult to untangle because many variables affect the process of L2 phonological acquisition. Among these variables, we can mention the onset age of acquisition, nature of L1 phonological system, individual differences, as well as many other variables that are still under-researched. Research on second language (L2) phonology has predominantly concentrated on identifying and categorizing segmental and prosodic errors produced by learners and providing remedies (Avery & Ehrlich, 1992; Kharma & Hajjaj, 1989; Mairs, 1989). Segmental errors involve the substitution, omission, or addition of individual speech sounds (phonemes), while prosodic errors involve alternations in suprasegmental features such as stress, rhythm, intonation, and timing. Later phases of L2 phonology research moved from identifying and categorizing types of errors to exploring and measuring their effects on intelligibility, comprehensibility, and accentedness. These phonological deviations are found to directly affect how listeners perceive and understand non-native speech (Derwing & Munro, 2005; Trofimovich & Baker, 2006). The next section examines the concepts of intelligibility,

comprehensibility, and accentedness, as well as the terminological ambiguities surrounding them across different L2 acquisition research paradigms.

3. Intelligibility, Comprehensibility, and Accentedness: Central Constructs in L2 Pronunciation Research

In the literature, the terms *intelligibility* and *comprehensibility* are sometimes used interchangeably, with some research considering them to be separate concepts. This conceptual ambiguity largely stems from the use of varied assessment methods across studies, resulting in terminological inconsistency. Historically, the concept of intelligibility was closely linked to a specific variety of English, predominantly spoken within the ‘Inner Circle’ as defined by Kachru (1985). This variety was regarded as the prestigious, accurate, clear, and normative standard, which non-native speakers were expected to emulate. Consequently, other English varieties were often deemed inherently inferior, inaccurate, or incomprehensible, thus necessitating correction or improvement. However, this prescriptive view has since faced substantial critique, notably by scholars such as Smith (1992) and Smith and Nelson (1985), who challenged its validity and implications.

The work of Bamgbose (1998, p. 11) provides a holistic definition of intelligibility which conceptualizes it as a multifaceted construct, encompassing recognition of an expression, understanding of its meaning, and grasping of the significance of that meaning within its socio-cultural context. This definition contrasts with other frameworks that decompose intelligibility into multiple hierarchical components. For instance, Smith and Nelson (1985) propose a tripartite model, distinguishing between intelligibility, comprehensibility, and interpretability. Within their framework, intelligibility pertains to the accurate identification of words and sentence-level elements. Comprehensibility involves grasping the meaning associated with words or utterances, and interpretability concerns the discernment of the speaker’s intended purpose or communicative intent. Complementing this view, Munro, Derwing, and Morton (2006, p. 112) emphasize the necessity of differentiating among various dimensions of L2 speech, specifically accentedness, comprehensibility, and intelligibility. They define accentedness as the degree to which a speaker’s pronunciation deviates from an expected normative pattern, while intelligibility, according to Derwing and Munro (2005, p. 385), refers to the extent to which a listener successfully comprehends an utterance. In contrast, *comprehensibility* is characterized as a listener’s subjective perception of the effort required to understand the speech.

The terminological ambiguity surrounding the concept of intelligibility underscores the inherently multifaceted and complex nature of second language (L2) speech. It is important to distinguish that while both accentedness and comprehensibility are typically assessed through subjective listener evaluations of speech samples, intelligibility constitutes an objective metric, reflecting the extent to which a speech sample is accurately understood. Although traditionally employed to gauge information transmission in challenging contexts such as noisy environments, intelligibility is increasingly recognized as a crucial and effective measure for evaluating nonnative speech. This is predicated on the premise that the ability to be understood in a foreign language represents a fundamental aspect of successful communicative interaction (Serano, Lammers, & Jongman, 2016).

Most research has analyzed L2 phonological errors and segmental and prosodic deviations within relatively small units of speech, such as single words, phrases, or isolated sentences. This narrow scope allows researchers to pinpoint specific phonetic or phonological difficulties

without the confounding factors present in longer discourse. For example, Field (2005) focused on lexical stress errors in isolated words and phrases. The methodology involved the use of controlled, isolated word recordings with systematic manipulations of lexical stress and vowel quality to explore how these prosodic features influence intelligibility from the listener's perspective. Groups of listeners were asked to transcribe the recorded material. Their transcription errors were analyzed to assess how lexical stress shifts impacted intelligibility. Salves, Wanglon, and Alves (2020) investigated how familiarity with foreign-accented speech influences the intelligibility of Brazilian EFL learners. Although their data comprised spontaneous speech, the researchers systematically segmented the utterances into discrete sentences. They, then, analyzed and classified key deviations at the single-word level to assess their impact on overall intelligibility.

Uchihara (2022) sought to evaluate the validity of assessing comprehensibility versus accentedness as indicators of word pronunciation knowledge in L2 learners. The study examined how four listener-based measures—comprehensibility, accentedness, intelligibility, and processing time—interrelate with one another as well as how much L2 speech linguistic characteristics—such as segmental accuracy, word stress, rhythm, and fluency—influence ratings of comprehensibility and accentedness. Nineteen native English speakers evaluated isolated English words produced by L1 Japanese speakers, elicited through a picture-naming task, focusing on comprehensibility and accentedness. While native listeners rated these qualities, expert raters conducted timed dictation to assess intelligibility and processing time. The findings indicated that comprehensibility and accentedness function as partially distinct constructs, with linguistic features, like segmental accuracy, word stress, and rhythm, significantly shaping ratings; notably, longer isolated words were understood more easily than shorter ones.

Most of these studies demonstrate that L2 comprehensibility and intelligibility have been effectively measured at the word or phrase level, often using isolated words elicited by picture naming or short sentences, with listener-based rating scales and transcription/dictation tasks. They have contributed to our understanding that accentedness, comprehensibility, and intelligibility are related but partially independent dimensions of L2 speech. However, these studies' focus on isolated utterances leaves a gap in understanding how phonological deviations and lack of prosodic mastery influence intelligibility in more natural, connected speech. Prosody, in particular, unfolds over larger stretches of discourse and plays a role in signaling meaning beyond the sentence level (Wennerstrom, 2001). Hence, it is necessary to examine the contributions of studies that have explored the influence of prosody on L2 discourse comprehension through the use of natural speech and extended discourse samples. Such an analysis is essential for advancing our broader understanding of prosody's role in oral discourse comprehension and its impact on crisis in discourse.

4. Advancing Insights into the Role of Prosody in Extended Discourse

Discourse comprehension and processing refer to the cognitive and linguistic mechanisms by which individuals understand, interpret, and make sense of extended stretches of language beyond isolated words and sentences. This encompasses a wide variety of linguistic inputs—spoken or written—that together form coherent communication units, such as conversations, narratives, or expository texts. Unlike mere sentence-level understanding, discourse comprehension requires the integration of multiple linguistic, cognitive, and contextual clues to construct meaning at a macro level. Indeed, the role of prosody varies across discourse types, adapting to the communicative goals and structural demands of each form. In narrative oral discourse and storytelling, for instance, prosody is believed to help demarcate event boundaries,

highlight characters or actions, and express emotional states, which sustains the listener's construction of a comprehensible story (Cutler et al., 1997). For example, rising intonation at the end of a sentence may indicate suspense or anticipation, prompting the listener to infer underlying or temporal relations between narrative chunks.

In conversational discourse, prosody is found to guide interlocutors in managing turn-taking, signaling topic shifts, and marking speech acts such as requests or confirmations (Hami, 2017; Fox et al., 2013). Slight variations in pitch and stress can inform interlocutors about speaker intentions and engagement, encouraging coherent interactions (Local, Kelly, & Wells, 1986). Prosodic patterns, thus, may serve pragmatic functions that are essential for maintaining conversational flow and mutual understanding. In expository or instructional discourse, research on prosody suggests that it aids in highlighting important information, structuring arguments, and signaling logical relations (Cutler et al., 1997). For instance, prosodic prominence can indicate contrastive elements or topic shifts, helping listeners prioritize information selection and integrate complex ideas effectively.

For second language (L2) learners, discourse comprehension poses particular challenges due to their developing linguistic proficiency and limited familiarity with the target language's pragmatic and prosodic rules and principles. The process of discourse comprehension involves decoding individual lexical items and syntactic structures but significantly extends to higher-order interpretive functions, including the recognition of thematic coherence, inference generation, and accommodation of pragmatic intentions (van Dijk & Kintsch, 1983). Kintsch's Construction-Integration model (1988) underscores that discourse processing entails building a mental representation of the text's meaning by integrating new information with prior knowledge, a process often more demanding for L2 learners given their less automatic lexical access and syntactic parsing. Within this broad framework, concepts, such as intelligibility and comprehensibility, are fundamental yet represent narrower facets of discourse processing. Importantly, L2 learners' discourse comprehension depends not only on these factors but also on their ability to interpret and use prosodic cues effectively.

Other studies attempted to address this gap by incorporating longer utterances or discourse-level analysis. Gut (2009) assessed the use of mixed-method approaches combining acoustic analysis to examine prosodic development in L2 learners during controlled and spontaneous speech tasks, such as read speech, story re-telling, and interviews with the participants. Prosodic features- such as pitch range, speech rate, and rhythm- were analyzed acoustically in controlled, semi-spontaneous, and spontaneous speech elicitation tasks. Derwing and Munro (2013) emphasized the importance of connected speech by investigating how suprasegmental features across sentences influence listener comprehension. The primary speech sample was elicited, using a narrative task: participants were asked to describe an 8-frame cartoon story, which generated extemporaneous, spontaneous speech rather than controlled or read-aloud sentences. The recorded narratives were then evaluated by both native and highly proficient non-native English speakers for comprehensibility, fluency, and accentedness. This approach allowed the researchers to capture more natural, real-world language use, aiming for greater external validity than studies relying solely on isolated sentences or reading tasks.

Numerous other studies have examined the role of prosody in discourse comprehension, particularly in the context of second language (L2) learners engaging with extended spoken texts such as conversations or speeches. Hardison (2005) examined the effects of contextualized computer-based prosody training on L2 learners' comprehension of extended spoken discourse. The study found that training incorporating discourse-level input, such as video-based

materials, led to better transfer of prosodic skills to novel natural discourse contexts, compared to training focused on individual sentences. The findings imply that when measuring at the level of extended connected speech that characterizes natural discourse, relevant contextualized input is beneficial for prosody training. Fang et al. (2021) investigated how L2 learners of English integrate prosodic cues, specifically pauses, during auditory speech comprehension. Their findings revealed that both less-proficient (A2) and more-proficient (C1) learners were sensitive to pauses; however, the direction and magnitude of this sensitivity differed between the groups. A2 learners responded faster when brief pauses were placed within syntactic phrases, while C1 learners responded faster when pauses were placed between syntactic phrases. Tong et al. (2023) explored the relationship between prosodic sensitivity and reading comprehension among bilingual children. Their study indicated that prosodic sensitivity, particularly in the L1, was positively correlated with reading comprehension abilities in both L1 and L2 contexts.

These methodological advances and the use of spontaneous and natural speech utterances underscore the importance of examining L2 phonology not only at the segmental or single word/phrase prosodic level, but also within the broader context of natural speech. Analyzing phonological errors at the discourse level reflects authentic communication challenges more accurately and guides better pedagogical interventions.

5. Enhancing Clarity and Resolving Miscommunication in L2 Discourse

For L2 learners, prosody can serve as an essential scaffold, helping to parse continuous speech into meaningful units and to interpret pragmatic nuances, which are often less accessible through lexical or syntactic cues alone (Calhoun, 2010a; Calhoun, 2010b). However, L2 learners frequently exhibit difficulties in perceiving and producing native-like prosodic patterns, which can hinder their discourse comprehension and communicative effectiveness (Gumperz, 1982; Jenkins, 2000). For example, failing to recognize prosodic boundaries may lead to misinterpretation of sentence structure or discourse coherence, while improper use of intonation contours can result in pragmatic misunderstandings, such as misinterpreting questions as statements or missing contrastive emphasis (Pierrehumbert & Hirschberg, 1990). In addition, misleading prosody, such as placing an unexpected prominence on a given word or failing to accentuate a new or important word, can significantly hinder language processing. Research has shown that such prosodic mismatches can lead to confusion in referent assignment, as demonstrated in eye-tracking studies, where listeners often misinterpret the intended meaning or focus of the utterance. Supporting evidence from ERP (Event-related potential: brain responses used to examine how the brain processes input in real time) studies (e.g., Magne et al., 2007) further indicates that semantic integration is disrupted when the prosody of a sentence does not align with its syntactic or contextual expectations.

The inappropriate application of intonational patterns can also result in the unintended projection of unfavorable attitudes to interlocutors. Non-native speakers frequently risk being perceived as discourteous or unapproachable, as exemplified in Gumperz (1982, p.173), wherein recently employed Indian and Pakistani cafeteria workers at a British airport were deemed rude and uncooperative solely due to their intonational contours. Specifically, when offering ‘gravy,’ these L2 English speakers employed a falling intonation contour, diverging from the rising intonation typically utilized by native speakers in offer-making contexts. This deviation was misinterpreted by clients as indicative of indifference and discourtesy. Such prosodic inaccuracies in second language speech bear significant consequences, as they may convey erroneous interpersonal stances, thereby jeopardizing employment stability for L2 speakers. Securing and maintaining employment pose considerable challenges for immigrants

exhibiting pronounced foreign accents, given the entrenched association between accent and speaker identity. A foreign accent is often construed as a marker of outsider status, thereby eliciting negative stereotypes and social marginalization (Bresnahan, Ohashi, Nebashi, Liu, & Shearman, 2002).

Research also indicates that transfer of L1 intonational patterns into L2 speech can profoundly distort emotional intent, with potentially serious communicative consequences. Russian speakers, producing English utterances with native Russian intonation, are reported to often prompt misperceptions among listeners. For instance, yes-no questions, delivered with a Russian-style high boundary tone, were frequently interpreted as exclamations of surprise rather than genuine queries. More strikingly, imperative sentences, when intoned according to Russian norms, were perceived as emotionally negative or commanding, even when the speaker intended a neutral or polite tone (Fitzpatrick, 2013; Top, 2013). Holden and Hogan (1993) similarly documented that such L1-influenced prosody in English renders the speaker more hostile or irritated to native listeners. These findings underscore the fragility of emotional nuance in L2 speech: even syntactically correct utterances can be misread as rude, angry, or emphatic when the prosodic cues betray native-language patterns, highlighting an urgent need for explicit instruction on emotional intonation in advanced L2 pedagogy.

Juncture, a subtle yet fundamental prosodic feature, pertains to the way sounds are linked or separated at word boundaries during speech production. It operates on the temporal and intonational level, influencing how listeners segment continuous speech into meaningful lexical items. While often neglected in communication, juncture plays a critical role in the listener's ability to decode and comprehend spoken language. Mismanagement or ambiguity in juncture can lead to severe communication breakdowns and discourse crises, as it fundamentally affects lexical parsing and semantic interpretation (Crystal, 2008; Demirezen, 1986). The notion of juncture can be broadly classified into open juncture (a perceptible pause or separation) and close juncture (smooth linkage between sounds), which shape how words are perceived as separate or merged. This distinction is essential for disambiguating phrases that are homophonous or contain minimal pairs differing only in junctural cues. For example, the phrases 'ice cream' versus 'I scream' or 'my train' versus 'might rain' are typical illustrations of how juncture determines semantic clarity. Failure to signal juncture appropriately often results in ambiguity, misunderstandings, or humorous misinterpretations, which may escalate into discourse crises — moments where communicative intent is compromised or significantly delayed due to confusion (Cruttenden, 1997).

A paradigmatic case —demonstrating the effect of juncture on communication—is the iconic British comedy sketch *Four Candles*, performed by The Two Ronnies (1976). The humor arises from phonological ambiguity generated by juncture confusion. In the sketch, a hardware store customer asks for 'fork (h)andles', which the shopkeeper initially interprets as 'four candles' due to the phonetic similarity modulated by juncture cues. The misunderstanding results in a series of escalating miscommunications, highlighting how juncture can profoundly affect lexical recognition. This example vividly illustrates how prosody affects lexical access. When juncture cues are misinterpreted, the listener accesses an incorrect lexical entry, thereby derailing the communication process (Gimson, 2001). Indeed, juncture problems reveal the complex interplay between phonetics, phonology, and pragmatics in real-time language use. Speech is inherently continuous, and listeners must rely on subtle acoustic cues to segment speech streams accurately. Juncture is not merely a matter of phonetic pause but involves a complex system of cues, including timing, intonation, and articulatory gestures (Crystal, 2008; Demirezen, 1986; Demirezen, 2009). When these cues are ambiguous or insufficient, the parsing of speech becomes error-prone, leading to communicative failure. Furthermore, the

ambiguity arising from juncture issues extends beyond single-word confusion to affect entire discourse coherence, potentially triggering discourse crises where interlocutors must negotiate meaning repair strategies, such as clarification requests or repetition (Schegloff, Jefferson & Sacks, 1977). The findings from all those studies highlight the salient role of prosody in guiding listeners' interpretation and maintaining discourse coherence. They underscore the necessity for heightened awareness of its role among the diverse interlocutors engaged in the process of second language acquisition, across phonetic, structural, pragmatic, and discourse dimensions, and highlight its significance in facilitating persuasive and interactive communication.

However, while prosody constitutes a vibrant component of effective discourse, its role should be understood in relation to, rather than in isolation from, other linguistic and contextual factors, and thus not afforded disproportionate emphasis. Prosody typically operates in conjunction with lexical and syntactic cues to convey the illocutionary force of spoken utterances. Sridhar, Bangalore, and Narayanan (2009) provide empirical evidence demonstrating that prosody can independently contribute to the interpretation of discourse meaning. Using an automatic classification approach with spontaneous speech data from the Map Task and Switchboard corpora, the authors examined the predictive value of lexical, syntactic, and acoustic-prosodic features in identifying dialog acts. Their findings indicate that incorporating acoustic-prosodic features into the model yields only a modest accuracy increase of 2.8%. The modest improvement—resulting from the inclusion of acoustic-prosodic cues—indicates a considerable overlap between the discourse function signaled by prosody and that conveyed through the lexical and syntactic characteristics of an utterance. Further improvements were observed when contextual information from preceding dialog acts was also modeled. This research underscores a critical insight: while prosody plays a role in pragmatic interpretation, it is but one element within a complex, multifactorial communicative system. The encoding of discourse meaning through prosody exhibits considerable variability across speakers, utterances, and contexts, both at the phonological and phonetic levels. Consequently, although listeners are sensitive to prosodic cues when they are available, prosody alone does not constitute a consistently reliable indicator of discourse function, hence, the necessity of cross-disciplinary approaches to the study of prosody.

6. Key Contributors and Venues in Prosody Research

Research on prosody is primarily conducted by researchers within the specialized fields of phonetics and phonology, which focus respectively on the physical articulation and acoustic properties of speech sounds and the abstract, systematic organization of these sounds in language. The multifaceted nature of prosody research often intersects with psycholinguistics, cognitive science, and speech technology, reflecting its broad application to understanding human communication. Prominent scholars who have significantly advanced the study of prosody include D. Robert Ladd, Marina Nespó, and Janet Pierrehumbert, among other authorities in the field. Ladd's pioneering contributions to intonational phonology have been influential in framing the theoretical understanding of pitch patterns in language. His comprehensive synthesis, *Intonational Phonology* (Ladd, 2008), remains a foundation text for researchers who seek to explore the interaction of tonal elements and linguistic meaning. His earlier book, *The structure of intonational meaning: Evidence from English* (Ladd, 1980), exemplifies meticulous empirical and theoretical investigation into intonational patterns and their phonological representation in English. Marina Nespó's research particularly integrates prosodic phrasing with syntactic structure, contributing to the understanding of how prosody reflects and influences higher levels of linguistic organization. Nespó and Vogel's *Prosodic Phonology: With a new foreword* (2007) has shaped contemporary debates by systematically

exploring the hierarchical nature of prosodic domains and their interface with morphosyntactic structures. This type of research demonstrates how prosodic clues ease parsing and comprehension, underscoring the cognitive dimension of prosodic studies. Janet Pierrehumbert's early work on intonation modeling revolutionized the field by introducing computational and experimental methods to characterize intonational patterns. Her foundational doctoral dissertation, "The phonology and phonetics of English intonation" (Pierrehumbert, 1980), proposed a model that allowed for detailed representation and synthesis of intonation contours, influencing both theoretical linguistics and speech technology research.

Scholars conducting phonetic and prosodic research disseminate their findings through a variety of esteemed international peer-reviewed journals that link phonetics and phonology, including the *Journal of Phonetics*, which focuses on the acoustic and articulatory aspects of speech; *Phonology*, a leading journal for theoretical and formal phonological research; *Laboratory Phonology*, which emphasizes experimental and interdisciplinary approaches, and the *Journal of the Acoustical Society of America*, famous for its contributions to the physics and perception of speech sounds. These journals jointly support the robust academic environment where prosody is interrogated through various methodological lenses, reflecting its intricate role in language. Phoneticians predominantly concentrate on the detailed characterization of acoustic and articulatory phenomena that constitute prosodic features. This focus originates from the necessity to quantify the physical correlates of prosody, such as pitch, duration, intensity, and articulatory gestures, which collectively shape the rhythm, stress, and intonation patterns of speech. For example, fundamental frequency (F0) measurements present a key indicator of pitch variation and intonation contours, enabling rigorous analysis of how speakers modulate voice pitch over utterances. Similarly, the temporal dimension of prosody is often examined through durational differences in segments and syllables, particularly concerning stress, where stressed syllables tend to be lengthened compared to their unstressed counterparts (Turk & Sawush, 1997; Turk & Shattuck-Hufnagel, 2000; Turk & White, 1999).

The strong emphasis on acoustic and articulatory measurements in this field of research provides a detailed, quantifiable description of speech characteristics, including pitch contours, syllable duration, intensity, and articulator movement. For instance, researchers analyze fundamental frequency (F0) to understand intonation patterns or use spectrographic data to track the temporal aspects of stress. Cross-linguistic studies have been instrumental in elucidating how different languages encode prosodic contrasts through rhythm and intonation. Notably, the typological distinction between stress-timed and syllable-timed languages has received extensive empirical validation. English, a prototypical stress-timed language, exhibits roughly equal temporal spacing between stressed syllables, leading to a variable number of unstressed syllables between them (Fant et al., 1991; Pennington, 1996; Pike, 1948). In contrast, syllable-timed languages, such as Spanish, display more uniform syllable durations, resulting in a rhythm perceived as more regular and steadier (Clark & Yallop, 1990; Grabe & Low, 2002; Laver, 1994). The measurement of such acoustic features and variables requires specialized knowledge of signal processing, including Fourier analysis and waveform interpretation, which often involves jargon unfamiliar to researchers from other disciplines.

The methodological rigor distinguishing phonetic research on prosody has been considerably improved by advancements in acoustic and articulatory measurement technologies. Contemporary investigations frequently use the *Praat* software platform (Boersma & Weenink, 2023), which facilitates precise acoustic analysis, including pitch tracking, intensity contours, and formant measurement. Complementary to acoustic analysis, Electromagnetic Articulography (EMA) allows for real-time tracking of articulator movements with high spatial and temporal resolution, offering critical insights into the coordination of

articulatory gestures underlying prosodic phenomena (Rebernik et al, 2021). Research methods in this field typically combine controlled speech production tasks with perception experiments, allowing the systematic examination of prosodic contrasts and their cognitive processing. Participants may be asked to produce speech with varying prosodic patterns under experimental manipulations or to perceive and discriminate between prosodic variants, thereby linking production data to perceptual salience (Di Paolo & Yaeger-Dror, 2011). Such research enriches our understanding of language-specific prosodic signatures but remains rooted in the investigation of the physical correlates that ground these patterns in speech production and perception. In addition, the complexity and sophistication of these experimental methods require not only linguistic expertise but also proficiency in signal processing, statistical modeling, and experimental design.

7. The Divide among Phoneticians, Applied Linguists, and Discourse Analysts: Consequences and Challenges

While advances in technology have greatly expanded the scope and precision of prosodic research, they also pose accessibility challenges, particularly for researchers lacking interdisciplinary training or access to specialized equipment. Focus on the physical measurements contributes to the production of detailed and reliable data. However, it also makes prosodic research sound highly technical and abstract to linguists from other disciplines. The overwhelming emphasis on acoustic parameters—such as F0, intensity, and duration—often overshadows the pragmatic, interactional, or discourse-related aspects of prosody. The research tends to sound ‘technical’ and ‘acoustic’ to non-specialists because it focuses on physical properties rather than communicative functions. The intricate data visualizations—pitch tracks, intensity curves, and spectral graphs—dominate papers in this domain, while the applied significance of these features may be less emphasized. Yet, prosody plays a multifaceted role beyond the physical level: it encodes emotion, discourse structure, emphasis, and interactional cues. Indeed, these pragmatic aspects often receive less attention in phonetic research because they are difficult to quantify acoustically. This acoustic-pragmatic divide means that prosodic research may disregard how prosody functions in natural conversational contexts or in facilitating language learning and communication, focusing instead on controlled, often non-natural, speech samples (Ford & Thompson, 1996). Consequently, prosody research in phonetics and phonology is sometimes criticized for lacking an applied dimension, making it less accessible for practitioners outside of the field.

Applied linguists, working in areas such as second language acquisition, language teaching, and speech-language pathology, depend on accessible, functional descriptions of prosody that relate directly to learner or client outcomes (Field, 2005). However, the technical orientation of phonetic prosodic research poses significant challenges for applied linguists trying to incorporate findings into their work. One key issue is the high degree of specialization and technical language used in acoustic analyses. Terms, like ‘F0 contour,’ ‘spectral tilt,’ or ‘articulatory kinematics,’ may sound unfamiliar and intimidating to those without phonetics training. As a result, applied linguists often find it difficult to interpret findings or translate them into pedagogical strategies. For example, a phonetic paper may demonstrate statistically significant differences in pitch range between native and non-native speakers but fail to clarify how these differences affect learner intelligibility or social perceptions in the classroom. This disconnect is intensified by methodological differences. Applied linguistics tends to favor holistic and qualitative data—such as learner narratives, classroom observations, or communicative effectiveness—while phonetics emphasizes quantitative acoustic measures from controlled laboratory experiments. Consequently, prosody-related research in applied

linguistics may rely more on perceptual ratings or intuitive judgments rather than on the objective acoustic detail prized by phoneticians. For example, pronunciation teaching research frequently uses listener comprehension tests and accent perception studies (Derwing & Munro, 2005; Munro & Derwing, 2011), but often lacks integration with the detailed acoustic characterizations of prosodic features found in phonetics journals.

This gap leads to under-informed teaching approaches that may neglect crucial prosodic components, such as appropriate intonation patterns or stress timing, which are known to influence intelligibility and social acceptability (Saito, 2013). The separation between phonetic research and applied linguistics manifests as a lack of interdisciplinary dialogue and collaboration. Generally, phoneticians prioritize describing the physical characteristics of speech and modeling prosodic systems, while applied linguists focus on language learning, teaching methods, and communicative effectiveness. This divergence in goals, methods, and focus leads to disciplinary silos, reducing the opportunities for cross-fertilization of ideas. Academic incentives and publication venues exacerbate this separation. Phoneticians aim to publish in technical journals like *Journal of Phonetics* or *Phonology*, which are less frequented by applied linguists. Conversely, applied linguists publish in journals such as *TESOL Quarterly* or *Applied Linguistics*, which rarely include detailed acoustic studies. The lack of shared forums limits awareness of complementary findings and thwarts collaborative research efforts. Furthermore, the specialized training required to engage with phonetic data deters many applied linguists from delving into prosodic acoustic research. Conversely, phoneticians may be less interested in the practical constraints and pedagogical challenges faced by language teachers. This disciplinary isolation means that phoneticians may produce highly sophisticated models that are unrealistic for classroom use, while applied linguists may develop teaching methods without a grounding in detailed phonetic evidence (Field, 2005; Munro & Derwing, 2011).

While the disconnection between phoneticians and applied linguists has been noted, an equally important but often overlooked gap exists between phonetics researchers and scholars from the fields of discourse analysis and language comprehension and processing. This absence of collaboration further hinders the integration of prosodic research into the broader understanding of language use, meaning construction, and cognitive processing. Discourse analysts study how language functions in social interaction, examining features such as turn-taking, emphasis, information structure, and the pragmatic functions of speech. Prosody is recognized within discourse analysis as a crucial resource for signaling discourse organization and speaker intentions (Couper-Kuhlen & Selting, 2018; Ford & Thompson, 1996;). However, discourse scholars often rely on perceptual and qualitative descriptions of prosody rather than detailed acoustic analysis. This reliance, which is partly related to the technical complexity of phonetic data, such as pitch tracking or spectral analysis, lies outside their methodological training and research paradigms. Consequently, discourse analysts sometimes reject or undervalue phonetic research on prosody as excessively technical, reductionist, or detached from real-world interaction. The highly controlled laboratory methods and quantitative measurements typical of phonetics are perceived as incompatible with the dynamic, context-dependent nature of discourse. For example, while a phonetic study might meticulously measure intonation contours in read speech, discourse analysts prioritize the interpretive functions of prosody in spontaneous conversations, emphasizing meaning over physical measurement (Couper-Kuhlen, 2004).

Similarly, researchers in language comprehension and processing investigate how listeners process spoken language in real time, including how prosodic cues aid in parsing syntax and resolving ambiguities (Cutler et al., 1997; Snedeker & Yuan, 2008). Although these fields

benefit from prosodic research, many scholars prefer behavioral and eye-tracking studies over acoustic phonetic analysis because it fits more naturally into experimental cognitive paradigms. This preference can lead to a dismissal of phonetic findings as too technical or irrelevant, although acoustic detail underpins prosodic cues that comprehension relies on. For instance, studies on pitch accents and boundary tones provide critical information about how prosody guides syntactic parsing (Gussenhoven, 2004), but without collaboration with phoneticians, these insights often remain underutilized or superficially integrated into comprehension models. The siloing of phonetics, discourse analysis, and language processing research creates missed opportunities for comprehensive models of prosody that link physical signal properties with their communicative functions and cognitive processing. For discourse analysts, this means lacking access to precise phonetic tools that could refine transcription accuracy or illuminate subtle prosodic variations that signal pragmatic meanings—variations that might go unnoticed without acoustic analysis. For language processing researchers, it limits the development of detailed psycholinguistic models that incorporate the fine-grained acoustic cues essential for real-time processing. For phonetics, the lack of engagement with discourse and cognitive perspectives means that research may overlook functional and interpretive dimensions of prosody crucial for understanding language in context. Hopefully, the situation has seen notable improvement with the emergence of the *Journal of Second Language Pronunciation*. Increasingly, researchers in applied linguistics are incorporating more detailed phonetic analyses into their studies and are exploring the intricate relationship between prosody and pronunciation on the one hand, and discourse and pragmatics, on the other (Derwing, 2024; Kim & Archibald, 2024; Munro, Derwing, & Saito, 2024).

8. Pedagogical Implications and Applications

Traditionally, L2 instruction has focused heavily on grammar, vocabulary, and syntax, often neglecting suprasegmental features such as intonation, stress, and rhythm (Celce-Murcia, Brinton, & Goodwin, 2010). However, the increasing body of research- highlighting prosody's key role in meaning-making and interactional competence- calls for its explicit incorporation into language curricula (Couper, 2003; Gordon & Darcy, 2013). A significant pedagogical implication lies in the necessity of providing explicit instruction on prosodic features. This approach deliberately applies the principles outlined in the Cognitive Phonology Framework (Langacker, 1987; Taylor, 2000) to enhance learners' awareness of the critical role that accurate pronunciation plays. It facilitates the reconstruction of learners' conceptual understanding of the phonological system of the target language, as emphasized by Fraser (2000) and Pennington (1998). Particularly, Fraser (2006) illustrates this through the acquisition of word stress, contending that while EFL learners possess the physical capability to produce stressed syllables, the challenge lies in grasping the abstract concept of stress itself. This concept varies significantly across languages and often eludes learners' perceptual grasp, rendering its application in a new linguistic context particularly challenging. Fraser emphasizes that pronunciation transcends mere cognitive knowledge ("knowing-that") and necessitates practical mastery and skill development ("knowing-how") through constant practice (Fraser, 2006, p. 25).

Jenkins (2000) contends that the majority of stress deviations leading to comprehension difficulties are typically accompanied by segmental errors such as consonant omissions, incorrect vowel articulation, or flaws in syllable structure. She observes that "only rarely did word stress deviations alone present difficulties" (p.41). Nevertheless, Jenkins recounts a specific instance from her teaching experience with a second language learner that challenges this assertion. She recalls a Turkish learner, who unexpectedly and unrelated to a previous

discussion, asked her for the opposite of the word ‘mature,’ but stressed the first syllable instead. This, along with an imprecise rendition of the final /əʊ/ sound, led her to misunderstand the word as ‘matcho.’ The misunderstanding was only clarified when the student provided the written form of the word (p. 41). This episode illustrates that an isolated misplacement of word stress—despite minimal alterations in vowel quality—can indeed provoke a breakdown in communication, necessitating repair strategies, resorting to writing the word down in this case. This instance stands in contrast to Jenkins’s initial claim, revealing that stress errors can, in fact, impede understanding. It further highlights the importance of correct prosody use for successful communication in English as a second or foreign language.

Research has often shown that many learners struggle with prosody because its features do not transfer directly from their first language (L1) to the target language and because they have not yet fully internalized or accurately conceptualized the prosodic systems of the target language. For example, English learners, whose native language is Mandarin, may have difficulty with English intonation patterns due to Mandarin’s tonal nature (Guerra & Wayland, 2014; Wayland et al, 2015). Similar cases of intelligibility loss and comprehension problems are often reported for learners of English from different L1 backgrounds (Arabic, Japanese, Italian, Farsi, etc.). For instance, research-conducted on the Tunisian EFL context- showed a severe loss of intelligibility because of wrong stress placement and lack of vowel reduction in function words resulting from transfer from the native language and previously learnt languages, mainly Arabic and French (Ghazali & Bouchhioua, 2003). Without explicit guidance and awareness raising, L2 learners may misinterpret speaker intent, leading to communication breakdowns (Bouchhioua, 2017; Ghazali & Bouchhioua, 2003).

Effective teaching can involve focused practice on key prosodic features such as rising and falling intonation, lexical stress placement, the accompanying vowel reduction in unstressed syllables, and rhythm. Hahn (2004) found that training German learners of English on sentence stress and intonation improved their listening comprehension significantly, particularly in distinguishing questions from statements or detecting contrastive focus. Teachers can employ various prosodic transcription activities, where learners visually map pitch contours and stress patterns using tools like the ToBI annotation system (Tones and Break Indices) system (Beckman & Ayers, 1997). Celce-Murcia, Brinton, and Goodwin (2010) advocate the use of complementary, sequential stages when teaching pronunciation within the framework of a Communicative Approach. These stages link controlled practice, where learners focus on individual sounds and stress patterns, progress to the guided practice stage, emphasizing intonation and rhythm, and culminate in the communicative practice of entire conversations and real-life communicative activities. This structured progression aims to develop learners’ mastery of accurate pronunciation, with a particular focus on prosody across extended discourse chunks. By doing so, the approach seeks to enhance learners’ ability to communicate effectively, thereby minimizing the risk of communication breakdowns and discourse failures in authentic interactions. Indeed, incorporating prosody training within communicative language teaching (CLT) and task-based language teaching (TBLT) frameworks can enhance naturalistic learning. Activities that simulate real-life conversations encourage learners to attend to prosodic cues for turn-taking, signaling uncertainty, or managing repair sequences. For example, role-plays that require clarification requests or negotiation of meaning can highlight the pragmatic use of rising intonation or lengthened pauses to signal misunderstanding. Also, video or audio recordings of authentic L2 interactions can serve as input, helping learners recognize how prosody functions dynamically in discourse.

Prosody is inherently multimodal, often accompanied by gestures and facial expressions that enhance meaningful interactions (McNeill, 1992). Thus, multimodal teaching approaches

that integrate visual cues alongside auditory input can improve learners' prosodic sensitivity. For example, watching videos with subtitles and prosodic annotations can support comprehension (Derwing & Munro, 2015). Technology also plays an increasingly vital role, especially for the Z generation. Speech analysis software, such as Praat (Boersma & Weenink, 2023), allows learners to visualize their speech and compare it with native speaker models, providing instantaneous feedback on pitch, stress, and rhythm. Mobile apps- like ELSA Speak- use AI-driven feedback to help learners improve pronunciation and intonation patterns in appealing ways (Bouchhioua, 2024). Furthermore, computer-assisted language learning (CALL) environments and computer-aided pronunciation training (CAPT) systems, in particular, enable interactive practice with prosody. For example, interactive dialogues in virtual reality (VR) platforms, which enable users to experience and interact with immersive 3D worlds through VR technology, allow learners to practice turn-taking and repair strategies in immersive settings, enhancing their pragmatic and prosodic competence (Jung & Kwon, 2015), hence, the interconnection between phonetics and other disciplines, such as pragmatics and discourse analysis, in language learning.

Another critical pedagogical consideration is the need for teacher training. Many language teachers lack sufficient training in prosody and its teaching methods, leading to inconsistent or, inadequate instruction. Many language teachers tend to avoid teaching pronunciation due to various factors, mainly a lack of training, a lack of exposure to research in this field, or a lack of confidence in their abilities to teach this skill. (Baker, 2014; Bouchhioua, 2019; Derwing & Munro, 2015). Teachers also demonstrate limited knowledge of how to effectively assess this crucial skill. Many teachers often mistakenly assess pronunciation and prosody through written tests focused on theoretical phonetics rather than actual speech performance. This reflects a lack of understanding of how to evaluate oral language skills, as knowing phonetic rules does not guarantee accurate pronunciation or prosodic use in real communication. For instance, the frequent use of phonemic transcription tasks in tests further reflects this gap in assessment literacy, as these tasks measure abstract phonetic knowledge rather than real-world pronunciation skills (Bouchhioua, 2019). Professional development programs should equip teachers with the knowledge of acoustic phonetics, prosodic annotation, and practical classroom techniques to raise learners' prosodic awareness. Teachers can be trained to recognize prosodic difficulties in learners' speech and listening and to provide corrective feedback effectively without discouraging learners. For example, delayed feedback focusing on suprasegmental errors rather than immediate correction of segmental errors can promote learner self-monitoring and long-term improvement (Derwing & Munro, 2015; Lyster & Saito, 2010).

9. Future Directions

Future research on prosody, as a complex multimodal phenomenon involving acoustic and cognitive dimensions, would benefit from interdisciplinary collaborations combining linguistics, psycholinguistics, cognitive neuroscience, and educational technology to provide a holistic understanding. Multimodal research that investigates the integration of prosody with gestures, facial expressions, and eye gaze can also enrich our understanding of natural communication. McNeill's (1992) work on gestures underscores the importance of studying how prosody aligns with other communicative channels and shows how rhythmic hand movements (beats) are coordinated with the prosodic structure of speech. Similar research by Guellaï et al. (2014) reinforce the idea that spontaneous gestures and speech constitute an integrated communication system, in which the suprasegmental features of spoken language are linked to motor programs that govern the production of both vocal sounds and manual gestures.

Most prosody research in L2 settings focuses on learners acquiring a single target language, often English. However, many language learners today are multilingual or plurilingual, navigating multiple languages, multiple accents, and their respective prosodic systems (Cenoz & Genesee, 1998; Cenoz & Gorter, 2015; Cenoz & Jessner, 2000). Future research should further address how knowledge of multiple languages influences prosodic perception and production. Multilingual speakers may transfer prosodic features from one non-native language to another, or from a second language to a third one (Bouchhioua, 2016; Cenoz, 2003; Cenoz & Hoffmann, 2003; Cenoz & Jessner, 2000; Clyne, 1997). They can also develop unique hybrid prosodic patterns. Investigating such cross-linguistic influence could deepen our understanding of how prosody functions in real-world multilingual interactions, especially in globalized urban contexts. Plurilingual approaches to teaching prosody, which recognize learners' entire linguistic repertoire and encourage translanguaging practices, could be explored as more flexible and culturally sensitive pedagogical models. Research into how plurilingual learners manage communication crises using prosody can offer insights into adaptive language use and intercultural competence.

Individual learner factors—such as age, motivation, Working Memory Capacity, and cognitive styles—have long been recognized as influential in second language (L2) acquisition. Yet, their specific roles in the domain of prosody remain relatively underexplored (Moyer, 2013). Investigating how learner-internal variables affect the acquisition of prosodic features and their ability to use them in appropriate communicative contexts can provide more insights into the development of more individualized and effective pedagogical approaches. Age, for instance, has been widely studied in phonological acquisition, with younger learners generally exhibiting a greater capacity for acquiring native-like phonetic and prosodic patterns due to higher neural plasticity (Long, 1990; Piske, MacKay, & Flege, 2001). However, older learners may compensate for this biological limitation through greater metacognitive awareness and pragmatic competence, allowing them to employ prosodic cues more strategically to convey meaning and manage discourse (Flege & Bohn, 2021). For example, adult learners may not achieve native pitch contours but may still successfully use intonation to signal attitudes such as uncertainty or politeness, drawing on their broader communicative experience. While age has been linked to general phonological acquisition, more longitudinal and experimental research is needed to examine how age-related differences influence the acquisition of specific prosodic functions, such as boundary marking, prominence, or emotional nuance; factors that are significant in avoiding communication breakdowns.

Motivation is another key factor influencing prosodic acquisition. Highly motivated learners tend to engage more consistently with input and are more likely to notice and imitate subtle suprasegmental features (Dörnyei & Ushioda, 2011). Studies have shown that learners with higher integrative motivation—those who aspire to integrate with the target language community—are more attentive to prosodic aspects like intonation and stress because they view them as socially meaningful (Trofimovich & Baker, 2006). Motivation has also been shown to mediate the effectiveness of prosody-focused instruction, such as in high-variability phonetic training or shadowing techniques. Although motivation has been shown to affect pronunciation learning, its precise mechanisms in shaping attention to prosody—particularly in classroom versus immersive settings—remain insufficiently understood and require further investigation.

Working Memory Capacity plays a vital role in processing and storing prosodic information. Learners with higher working memory spans can better track temporal sequences in speech, hold larger prosodic units in mind, and reproduce stress and intonation patterns more

accurately (Wen, 2016; Wen, Biedroń, & Skehan, 2019). Since prosody involves integrating information over time—such as pitch declination across an utterance or stress-timed rhythm—greater working memory can facilitate more accurate perception and production. Moreover, cognitive styles—whether learners are more analytical or holistic—may influence how they attend to prosodic features. Analytical learners may focus more on segmental accuracy and overlook global prosodic patterns, while holistic learners might be more attuned to intonation contours and rhythmic flow (Skehan, 1998). Tailoring instruction to match these preferences could enhance learning outcomes; for example, visual learners might benefit from pitch tracking software or prosodic visualization tools like Praat or ProsodyPro (Xu, 2013). The role of working memory in prosodic learning also warrants deeper inquiry, especially regarding how learners manage the cognitive load of integrating prosody with syntax and pragmatics in real-time speech production. Additionally, the impact of cognitive styles on prosodic perception and production remains largely theoretical, with few studies offering sound empirical validation.

Recognizing and addressing these individual differences is not only pedagogically sound but also technologically feasible. With the advancement of intelligent computer-assisted language learning (ICALL), particularly Computer-aided pronunciation training (CAPT), adaptive systems can now track user performance and customize prosodic training accordingly. For instance, apps can adjust the difficulty level of prosodic exercises based on learner responsiveness or offer differentiated feedback based on whether a learner struggles with pitch, duration, or stress (Liakin, Cardoso & Liakina, 2015). Mobile apps-like ELSA Speak- use AI-driven feedback to help learners improve pronunciation and intonation patterns in an engaging way. Such adaptive technologies hold great promise for making prosody training both more engaging and more effective (Bouchhioua, 2024). However, further research is required to address the gaps in their efficient use by multilingual learners with different accents and from different L1 backgrounds.

10. Conclusion

Owing to their multifunctionality, prosodic features serve as communicative enhancers. They structure speech, highlight key information, and express a range of pragmatic meanings. Unsurprisingly, mastery of prosodic skills in L2 or multilingual contexts has come to be recognized as essential for successful communication. However, the importance of prosodic features in fostering persuasive and interactive communication should not be overstated. While prosody plays an important role in effective communication, it should not be given disproportionate weight. It is one of several cues—alongside lexical choice, syntactic structure, discourse context, and visual signals—that jointly facilitate speech comprehension and production. Prosodic features rarely operate in isolation; rather, they function in concert with other linguistic and contextual elements to convey meaning. Overemphasizing prosody at the expense of these other dimensions may lead to an incomplete understanding of communicative competence. Moreover, individual differences, such as motivation, cognitive style, working memory capacity, and linguistic background, influence how learners perceive and use prosodic cues. Recognizing this variability is crucial for developing flexible instructional approaches that accommodate diverse learner needs and styles.

Future research should address how prosodic features interact with other communicative cues in second language instruction, emphasizing the need for integrated approaches that reflect the complexity of context-sensitive communication. Rather than isolating prosody as a standalone skill, instructional models should account for the dynamic interplay between prosody, syntax, semantics, kinesics, and discourse context. Moreover, embracing multilingualism and translanguaging practices can enrich L2 learning by validating learners' full linguistic repertoires and encouraging flexible use of all available resources. Such an

inclusive approach not only supports more authentic communication but also fosters greater linguistic awareness and confidence in diverse professional and social settings.

To advance prosody research in ways that meaningfully inform L2 teaching and communication in multilingual contexts, greater collaboration is needed between phoneticians, applied linguists, and discourse analysts. Each discipline offers unique insights—whether in the acoustic and articulatory properties of speech, the pedagogical implications for language learning, or the pragmatic and sociocultural dimensions of discourse. However, the traditional separation between these fields can limit the scope and applicability of research findings. The methodologies employed by each discipline—ranging from instrumental phonetic analysis to classroom-based studies and discourse-oriented ethnography—often remain confined within their own academic silos. Making these methods more transparent, simplified where possible, accessible, and replicable across disciplinary boundaries would enhance mutual understanding and foster more cohesive research efforts. Bridging these disciplinary divides can lead to more comprehensive and practically relevant understandings of prosody, ensuring that research outcomes are accessible, pedagogically grounded, and responsive to the communicative realities of diverse, multilingual speakers. A more integrated approach promises not only richer academic insights but also more effective language instruction and policy development.

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Visual Grammar to Unveil ‘War Dilemmas’: a Multimodal Critical Discourse Analysis of Facebook Corpora on Gaza War 2023-2025

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Abstract

The crisis between Gaza Strip and Israel started on October 7, 2023 when Hamas launched an unprecedented attack on the Israeli kibbutz around Gaza Strip. The ravages of Israel's counter-attacks were shocking, especially that war atrocities have been filmed by photographers, portrayed by caricaturists, drawn by artists, and posted by activists on social media. In this context, Facebook images on the conflict were analyzed, using the Multimodal Critical Discourse Analysis (MCDA). The aim is to investigate the extent to which visual elements can replace textual discourse to uncover the devastating repercussions of the war between Gaza and Israel. Kress and Van Leeuwen's Visual Grammar Approach was used to analyze the collected pictures. At the ideational/representational level, the images could explicitly represent the bitter reality of an agonizing community. At the interactive, interpersonal level, MCDA could reflect enmity and belligerence between the occupation forces and resistance groups in Gaza, as well as unveil the relational aspects between the various participants in the randomly selected images. At the compositional level, the arrangement, positioning, and framing of images could enhance the idea of marginalizing, degrading, demonizing, and dehumanizing the enemy by the landowners. The originality of this paper emanates from intertwining Social Semiotic Theory, MCDA, and Visual Grammar Approach to examine how the visual in social media, mainly Facebook images on Gaza-Israel war 2023-2025, can serve the same aims as the textual.

Keywords: Social Semiotics, visual corpora, Multimodal Critical Discourse Analysis (MCDA), Visual Grammar Approach, social media discourse, Gaza War

1. Introduction

Multimodality in discourse analysis has attracted the interest of analysts due to the revolution in communication and media studies. The analysis of the textual elements in discourse has been sustained by the analysis of visual and audio elements in order to prove a given idea, or confirm a given hypothesis. This highlights the importance of the semiotic landscape in studying language and visual communication. Within this stream of thought, multimodal discourse analysis has drawn the attention of critical analysts to uncover social injustice or power abuse in discourse, in general, and media discourse, in particular. Concepts, like semiotics, visual grammar, multimodal discourse analysis, and multimodal critical discourse analysis, have pervaded the field of Critical Discourse Analysis (CDA) to study and scrutinize images, sounds, and, more broadly, the iconological dimensions of discourse.

Since its emergence as a method of critically doing discourse analysis (Baker et al., 2013; Van Dijk, 2001), CDA has been developed by linguists and analysts to demystify ideologies and power abuse through the investigation of semiotic data, i.e. written, spoken, and visual elements (Wodak & Meyer, 2009). CDA aims to throw more light on the interrelationship

between language, power and ideology and uncover the practices and conventions in and beyond texts that are politically and ideologically vested (Machin & Mayr, 2009).

Like CDA, MCDA has been developed to explore and investigate areas of injustice, abuse, inequality, and prejudice. It is concerned with the ideological aspect of discourse, such as the ideology of globalization, capitalist hegemony, and other contexts, like religious issues and media attitudes (Baker et al., 2013). Like CDA, MCDA analyzes news texts, political speeches, advertisements, schoolbooks, and other genres to unveil the discursive strategies that appear objective, or neutral, but might be deeply ideology-rooted. MCDA aims to reveal how the discursive strategies “seek the representation of events or persons for particular ends”, as well as how racism is mediated through different genres of discourse, such as news discourse and political speeches (Machin & Mayr, 2009, p. 5).

Currently, journalists and influencers have access to larger audiences, via T.V. channels and the Internet, more specifically social media networks that have offered them better opportunities to shape public opinion and call for social and political change. In this context, online political activism and the public criticism of the ‘War on Gaza’ that erupted on October 7, 2022 have brought to our attention the visual strategies that were employed to report war atrocities on social media. To uncover such strategies and unveil the atrocities of Gaza War and its devastating repercussions on an exterminated community, the present study attempts to answer the following research questions:

- 1- How does the Visual Grammar Approach unveil the representational, interpersonal, and compositional dimensions of Facebook images on Gaza War?
- 2- What are the sociocultural values and political ideologies communicated by these dimensions?

2. Background of the Study

It is important to highlight terms, like Multimodal Discourse Analysis (MDA) and Multimodal Critical Discourse Analysis (MCDA), along with previous studies on multimodality. Similarly, it is relevant to explain the main dimensions and components of the Visual Grammar Approach. It is also focal to shed light on the history of the Israeli Palestinian conflict and acknowledge previous studies on this problematic international issue.

2.1 Multimodal Critical Discourse Analysis

In the current Artificial Intelligence era, discourse analysis is shifting from a mono-mode to multi-mode meaning making, like music, gesture, facial expression, body language, images and other ways of communication (Yang, 2019). This cross-semiotic or multi-modal research was first mentioned in two books: *The Language of Displayed Art* by O’ Toole (1994) and *Reading Images: The Grammar of Visual Design* by Kress and Van Leeuwen (1996). The first book focuses on art, like architecture, painting, and sculpture. The basic view is that semiotics can help analysts search for language. The second book suggests an approach that has structured many multimodal researches, essentially on visual forms of communication (Kress & Van Leeuwen, 1996; Yang, 2019).

The term ‘multimodal discourse’ appeared in a third book *The Modes of Media and Contemporary Communication* written by Kress and Van Leeuwen (2001). Offering many theoretical foundations, these authors are the first linguists who used the word ‘multimodality’ in the field of discourse analysis. A few years later, Van Leeuwen and Jewitt (2004) edited the book *The Handbook of Visual Analysis* that explains different methods, like content analysis, social semiotic analysis, psychoanalysis, structuralist analysis, historical analysis etc. Royce (2002) also studied multimodality in TESOL classroom discourse, while Kress and Van

Leeuwen (2002) focused on color as a semiotic mode. Scollon and Scollon (2003) scrutinized discourses that were located in the material world or ‘geo-semiotics’ (Yang, 2019). LeVine and Scollon (2004), however, studied the link between discourse and technology.

More research on multimodality was conducted. Researchers looked at other modes of communication, like political cartoons (Mazid, 2008), and children’s toys (Machin & Van Leeuwen, 2009) to investigate how they make meaning in political contexts. Later, Menendez (2015) tackled rhetoric from a pragmatic and discursive perspective as a strategic approach to multimodal discourse analysis. Likewise, Çoşkun (2015) explained how MCDA denaturalizes ideological representations in media discourse. Jancsary (2016) also focused on the connection between the verbal and the visual modes of communication as well as the contribution of multimodality to CDA. Similarly, Okado-Gough (2017) studied the current approaches to CDA and the advent of multimodality.

In a similar vein, other linguists carried on researching multimodality in discourse analysis. Ledin and Machin (2018) examined the meta-functionality and materiality of multimodal communication. Later, Luca (2020) analyzed a newspaper article during the Brexit campaign period using different modes of analysis. Likewise, Mendez Perez (2020) unveiled the ideologies related to identity constructs that are implicit in three English textbooks used in public middle schools in Mexico. O’Holloran et al. (2021) focused on news media and social media, mainly Twitter discourse, during the COVID-19 pandemic. They used computational tools to analyze texts and images. More specifically, they integrated multimodal frameworks with computational models for big data, cloud computing, natural language processing, image processing, video processing, and contextual metadata.

Focusing on the same area of research, Sarkisova (2021) used MCDA to study a news report that promotes the personality cult of the president of Turkmenistan. The research demonstrates special linguistic choices and visual patterns applied to force a specific ideology on the audience. Zhang (2022) also gathered posters from a Chinese animations’ hero, called Nezha, and applied the multimodal approach to offer a more profound understanding of Nezha’s themes and connotations.

In short, numerous studies have been conducted within the framework of multimodality and MCDA. As the present study analyzes Facebook images on Gaza War 2023-2025, focus in the following section will be on Kress and Van Leeuwen’s method of visual corpora analysis.

2.2 Visual Grammar Approach

The Visual Grammar Approach was developed by Kress and Van Leeuwen in 1996. As Kress and Van Leeuwen (2006) state “most accounts of visual semiotics have concentrated on what might be regarded as the equivalent of ‘words’ – what linguists call ‘lexis’ – rather than ‘grammar’, and then on the ‘denotative’ and ‘connotative’, the ‘iconographical’ and ‘iconological’ significance of the elements in images, the individual people, places and things (including abstract ‘things’) depicted there” (p. 1). Kress and Van Leeuwen departed from this understanding of visual semiotics to develop their approach in a more sophisticated way. The primary aim of Kress and Van Leeuwen’s book is to explain the concept of ‘the grammar of visual design’ and discuss the historical, social and cultural conditions that govern the visual language (Kress & Van Leeuwen, 2006).

2.2.1 Representational Meaning

Representation can be narrative and conceptual. First, the narrative representation includes three elements, mainly action narrative, reactive narrative, and speech and psychological

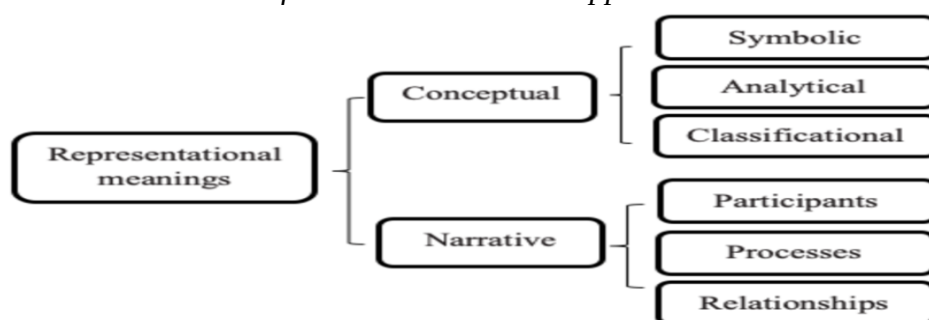
narrative. In the *narrative* of an *action*, the participants emit vectors, which are lines or symbols that refer to directions when participants are doing something to or for each other in the images. The *Actor* in these representations is the participant from which the vector emanates, or which itself, wholly or partly, forms the vector. The Actors are generally the most salient participants, via “size, place in the composition, contrast against background, color saturation or conspicuousness, sharpness of focus, and through the ‘psychological salience’ which certain participants (e.g. [...] the human face) have for viewers” (Kress & Van Leeuwen, 2006, p. 63). However, the image can be classified as belonging to *reactive narrative* when the vector in the image is only the eyes of the participants. In this context, the discourse analysis focuses on the *responder/interactor* and *phenomenon*, not on the action. Finally, the images, relating to *speech* and *psychological narrative*, usually involve speech bubbles that include what the participants think, or say (Kress & Van Leeuwen, 2006).

Second, *concept* representation shows the participants’ categories and characteristics as well as the relationship between them. Narrative images depict the process of change and reflect the development of an event/action. However, *concept* images focus on the representation or the meaning of the category of participants/elements in the images. Concept representation of the image includes three components: concept classification, concept analysis, and concept symbol. For instance, one part of the participant in the conceptual classification can be subordinate to another dominant or implicit part of the participant. As such, participants are represented as *Attribute Carriers* and these attributes can be ideas, such as innocence attributes, tyranny attributes, starvation attributes etc. In the conceptual analysis, the relationships between participants may be partial and/or overall, hence Part/ Whole relationships.

The subcategories of the representational component of Kress and Van Leeuwen’s approach are illustrated in Figure 1.

Figure 1

Representational Dimensions of the Visual Grammar Approach



2.2.2 Interactive Meaning

The second level of analysis, based on the Visual Grammar Approach, is interaction. The *interactive* meaning involves the threefold relationship: the image producer, the representation of the participant (the product/sign/element) in the image, and the image viewer. Compared with representation meaning, decoding the interactive meaning needs to mobilize the viewer’s ideological and cultural backgrounds more than the representational level. Indeed, such backgrounds guide the viewer’s perception of and attitude towards the representation of participants (Kress & Van Leeuwen, 2006). The image’s interactive meaning generally depends on four main factors: contact, attitude, distance, and modality. First, *contact* focuses on the existence or absence of eye contact between the participants in the image and the eyes of the viewers, and if it results in a kind of emotional experience on the part of the image viewer or not. If there is eye contact, the image belongs to *transactional* interaction, and if there is no eye contact, it is *non-transactional* interaction (Kress & Van Leeuwen, 2006).

Second, *attitude* is how participants can express themselves via facial expressions, eye expressions, and postures in the images. For instance, if the participant looks down from a high place, s/he may be humiliating the viewer, or showing pride and/or arrogance; from a bottom look up, s/he can ask for mercy and support. When the participant looks straight at the viewer with a smile, s/he may be defying him/her. Third, *distance* refers to the closeness of people's social relations or social distance. More specifically, it is the distance between social beings in space, time, and psychology. Fourth, *modality* can be classified as high modality, medium modality, and low modality. Modality markers can be illustrated in terms of scales:

- (1) *Color saturation*: a scale ranging from high color saturation to the absence of color; that is to black and white.
- (2) *Color differentiation*: a scale ranging from a highly varied range of colors to one color, or monochrome.
- (3) *Color modulation*: a scale ranging from the use of different shades of a given color, to plain color.
- (4) *Contextualization*: a scale that ranges from the absence of background to the fully explicit and detailed background (Adapted from Kress & Van Leeuwen, 2006, pp. 160-61).

Apart from the representational and interactive meanings of images, the following section will explain the compositional meaning of visual corpora, or the third component/level of the Visual Grammar Approach.

2.2.3 The Meaning of Composition

The meaning of composition can be analyzed based on three levels, namely information value, significance, and framing. Firstly, the *information value* considers the position where a given symbol is located in the image. The position of the symbol affects the meaning or the message in the image. For instance, the position on the left and right designates the structure of *Given* information vs. *New* information. In this regard, Kress and Van Leeuwen (2006) point out that “the meaning of the New is [...] ‘problematic’, ‘contestable’, ‘the information “at issue”’, while the Given is presented as commonsensical, self-evident” (p. 181). In addition, the *Upper* and *Lower* positions form the structure of the *Ideal* information vs. the *Real* information. As stated by Kress and Van Leeuwen (2006), “[...] what has been placed on the top is presented as the Ideal, and what has been placed at the bottom is put forward as the Real” (p. 186).

Secondly, *significance* refers to the salience of one symbol in the image to attract the attention of the viewer, and this depends on the positioning in the foreground or background, the size of the symbol, the contrast of colors, the intensity of light, etc. Finally, *framing* is when some elements are classified or excluded from others in scene selection; hence, this reflects if they belong to a specific frame or not. According to Kress and Van Leeuwen (2006), the principles of information value, significance, and framing are applicable to analyze both images and texts via multimodal discourse analysis.

Concisely, the Visual Grammar Approach is three-dimensional, encompassing representational, interactional, and compositional components. Such MCDA approach may unmask the Gaza War devastating repercussions and reflect the viewers and producers' sociocultural and political angles. Before tackling the methodological phase, a review of previous studies on the Israeli-Palestinian issue is necessary.

2.3 Previous Studies on the Israeli-Palestinian Conflict

Many scholars and linguists studied the Israeli-Palestinian conflict from different perspectives. Raza, Hakimi, and Malik (2023) focused on online solidarity with Palestine and

on how social media users' live reporting played an important role in making public opinion aware of the real humanitarian crisis in Gaza in May 2021. Another study, conducted by Alashqar (2024), analyzed the nuanced media portrayal of the war by *Fox News* and *CNN* - as American media outlets - and the *BBC* and *The Guardian* - as British media sources - during the escalation of violence in Gaza in May 2021. The main objective was to investigate how ideologies can shape Twitter narratives about the Israeli-Palestinian conflict.

Assaiqeli (2020) research is a critical discourse study of the linguistics of the UN resolutions on the Palestinian case. Implementing Wodak's Discourse Historical Approach, the study examined the role of peace discourse in shaping the realities of the prolonged Israel-Palestine crisis. Similarly, Abdulhussein (2024) conducted a study to critically analyze the discursive strategies, used to represent and interpret resilience in Gaza, focusing on the deeper ideologies, rhetorical devices, and narrative structures that characterize resilience discourse in times of hardship. Another research was conducted by Shreim (2015) who shed lights on provocation and proportionality in war reporting in 2008-2009 Gaza conflict.

Other researchers focused on other dimensions, like Wenden (2005) who studied representation in 12 articles posted on Aljazeera's English website to mark the third anniversary of the Al-Aqsa Intifada. Qawariq (2020), however, focused on political and ideological tensions in Palestine. Likewise, Zibin, Altakhaineh, and Jarrah (2024) studied compound nouns as linguistic framing devices in Arab news headlines that reflect a distinctive perspective, diverging from the narrative of some Western media.

In short, numerous studies delved into this problematic issue from different angles, linguistic, political, social and cultural. The Palestinian case has therefore been the focus of many researchers who dealt with it from various perspectives: political, social, cultural, and linguistic.

3. Methodology

This section explains how the visual corpora will be collected, processed, and analyzed.

3.1 Research Method

As stated before, to unveil meaning, it is important to link the unimodal study of language in discourse analysis to other domains, like vision and hearing. This study adopts the Social Semiotics framework, more specifically Kress and Van Leeuwen's (1996, 2006) Visual Grammar Approach, as a method to analyze the pictures on Gaza War. These images are social symbols that can be subject to analysis, description, and interpretation.

3.2. Data Collection

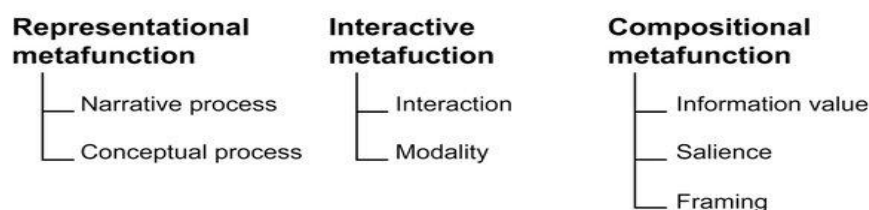
The data, to be considered for analysis, is a collection of 50 images, photographs, and drawings on Gaza War 2023-2025. These visual elements were collected from social media, namely Facebook. The data was gathered over a period of time that started on October 7, 2023 and ended in June 2025. The Facebook accounts and pages that shared these images were created by Palestinian activists or journalists. These Palestinian citizens reported real situations and the daily war atrocities they experienced in Gaza camps, districts, and cities.

3.3. Data Analysis

Kress and Van Leeuwen's approach, which departed from Halliday's (1978) three meta-functions, namely the ideational, the interpersonal, and the textual functions, is illustrated in Figure 2. In order to communicate meaning, the visual elements have to meet the following representational and communicational prerequisites.

Figure 2

Kress and Van Leeuwen's (1996) Three Dimensional Approach



4. Findings and Discussion

At this level, the focus will be on the main research findings while applying the MCDA approach to analyze the collected images. It also answers and discusses the main research questions that have been raised while conducting the present study.

4.1. Findings

Around 50 Facebook pictures were compiled in a file and were examined by the analyst. After a close observation of the recurrent tendencies and orientations of the photographs or images, the collected visual corpora was classified according to themes and sub-themes, like trauma (physical and psychological), abuse (women and children), torture (attacking children and attacking the elderly), resistance, and other themes. Due to the large number of images, one will opt for random sampling. The randomly collected samples, including captions, anchors and other textual elements, were analyzed by integrating the three levels of the Visual Grammar Approach. One of the recurrent themes is trauma, as illustrated in Figure 4.1.

Figure 4.1

a) *Psychological Trauma*



b) *Physical Trauma*



Image 4.1 (a) shows the psychological effect of war and torture on Palestinians. The first participant's eye is a Part of a Whole body that underwent severe torture and dehumanizing treatment in Israeli jails. The scars on his face tell the viewers about what he went through before being released. His look is non-transactional as he looks at nowhere, may be remembering the atrocities he endured during his imprisonment in Israeli prisons. The lower part of the picture reveals the psychological shock on a Palestinian boy's face. His facial expression and his wide-open eyes reflect the tragic effect of the Israeli bombing on Gaza civilians. The horizontal line creates a Top/Down dichotomy or framing, while the backgrounds unveil, first, the hellish conditions that resulted in extreme psychological trauma on the part of the young man at the top and, second, the gloomy world - grey clouds - of an innocent child, under the shock of Zionist attacks.

Image 4. 1 (b) compares a sportsman before and after being imprisoned and tortured by Israeli authorities. If we compare the two pictures in terms of physical appearance, the man lost weight, and it seems that he suffers from mental disorder. The mental turmoil or disturbance is clear on his pale face. With long hair, an open mouth and a deformed hand, he seems to suffer

from neurological disorder. The left image shows what is Given/Old/Known, while the right image reveals what is New. The absence of background gives more salience to the tortured victim and sheds more light on his dilemma. The vertical line draws a Given/New framing. The white background in the left picture and the black background in the right one give more salience to the man's hand. In the first, the hand reveals power and strength, while, in the second, it shows weakness and fragility. In the right image, the man's hand is a Part of a broken body or a broken Whole. Hence, the conceptual and compositional meanings unveil a Part/Whole dichotomy.

Figure 4.2

a) *Attacking Children*



b) *Attacking the Elderly*



Images 4.2 (a) and 4.2 (b) expose the atrocities of the Israeli army that used wild dogs to chase Hamas fighters. The first image is a drawing about a boy suffering from Dawn syndrome. As the image shows, he was attacked by a dog that was sent by Zionist soldiers to look for Palestinian fighters. The dog is wearing a blue jacket on which the symbol of Zionism is drawn. The white and blue evoke the Israeli flag colors. The boy, thinking that the dog is playing with him, utters for the first time in his life: "*Sebnī yā ḥabībī kḥalas!!*", translated from Arabic into English as "*Leave me my dear. Enough!!*" This utterance is an example of the speech and psychological narrative. This image went viral in social media networks, showing the cold-blooded Israelis who did not help the sick boy but let the dog shatter his body into pieces. The representational meaning of the red splash between the boy and the dog refers to the blood of Palestinian martyrs, shed by a bloody regime.

As for image 4.2 (b), the same incident occurred in a house of an old Palestinian woman. A dog ferociously attacked and severely injured the head of a Palestinian civilian. The *Actor* is the dog, while the *Patient* is the old woman. The old woman is not only a patient who receives the action but also a *Reactor* who expresses fear, sorrow, and pain. Her scream and her facial expression show many emotional features. Given her age, she symbolizes Palestine, its ancient civilization, and the roots of a lost country. Framing and salience are important in this picture since the dog's head and teeth are highlighted. Likewise, the woman's scared face is foregrounded to unveil her pain and emotional state. The dog's eye line is *transactional* as he forwards his eyes towards his prey, while the woman's eye line is *non-transactional*, just avoiding the dog's eyes.

Figure 4.3

a) *Attachment to the Roots*



b) *Attachment to the Land*



In 4.3 (a), the Part is the olive tree that symbolizes the country or the Whole. The idea of the Part of a Whole is also evoked in the second image. The woman and the tree are *foregrounded*, while the army vehicle is *backgrounded*. This framing gives more salience to the idea of resistance and land protection. Just like the tree that traces the history of a country and the roots of a population, the brick in 4.3 (b) is a piece of a building or a part of a nation. On the brick, it is written “*Hunāa bāaqūn*”, translated as “*Here we stay*”. The textual elements support the visual elements in the image. The *Central* position of the brick gives it salience and importance.

As for the *Interactive* dimension, the aim of participants is sending a message to colonizers that Palestinians will never leave their land. Whatever the circumstances they experience, Palestinians prefer death to forced immigration. The *Symbolic Attribute* of the image of the woman, holding the olive tree, reflects the attachment of the native inhabitants to their land, their identity, and their history. The same idea is evoked through the second image since the brick symbolizes the home/country. Attachment to the land is, thus, the prevalent theme in these two images.

Figure 4.4

a) *Exodus / Mass Migration*



b) *Evacuation / Displacement*



Exodus is the prevalent theme in image 4.4 (a). The participants are Palestinians who left north Gaza to seek refuge in the south, weeks after October 7 attack. The mass departure of these war victims represents the calamity of a population that seeks security and peace. What is foregrounded is the image of a family; two women and two men. The woman, facing the camera or the viewer, looks exhausted and desperate. She seems to be crying, while one of the men was looking at her desperately. The crying woman seems to be holding a new born in her hands. She might be a weeping mother who is worried about her child’s future. The man could do nothing but show affection and concern via his thoughtful looks. We can also notice the eye lines of two men looking at the photographer. This transactional interaction with the viewer seems to grab solidarity with them.

Image 4.4 (b) represents refugee life in hospitals, where they seek shelter and escape the countless Israeli bomb attacks. The positioning of the participants is circular, where participants are on the ground, laying their heads on some covers or bags. The participants look tired, and they badly need to sleep. They might have spent sleepless nights anticipating Zionist bomb attacks on their houses. The nurse is a *Carrier* and the *Attribute* is care, whether it is health care or mother care. She sleeps next to the children who may have lost their parents and their homes. The colors are various, ranging from black that symbolizes sadness and death in some cultures to green that represents security and serenity; from white that signals the innocence of children and death in other cultures to red that refers to blood and danger, and from pink that represents youth to light blue that signals security. We, therefore, notice high color condensation due to the diversification of colors in one image.

Figure 4.5*a) Boycotting Israel and Allies' Products**b) International Support*

In image 4.5 (a), we notice blue and red saturation. The color saturation may aim to attract the viewers' attention to the danger behind buying American/Zionist products. The *Carriers* are the missiles and the war aircraft, while the *Attributes* are Coca Cola and Pepsi products. The textual element "Coca Cola" helps the receiver to decode the message. The *Symbolic Attribute* is that buying Coca Cola and Pepsi is the equivalent of buying war weapons, hence funding genocide in Gaza. The aim is urging the audience to boycott the products of such genocide-funding companies.

In 4.5 (b), the *Carrier* is the building, while the *Attribute* is Palestine's flag. The *Symbolic Attribute* is supporting and showing solidarity with Palestine. The textual element "PALESTINE" on the wall supports the visual element in the picture, or the country's flag. The textual and the visual go hand in hand to transmit the same message. Boycotting Zionists' products and expressing solidarity with Palestine are prevalent themes in the posts shared on Facebook from October 2023 to June 2025.

Figure 4.6*a) Famine**b) Starvation*

Famine and starvation are the represented themes in these visual conceptualizations. In 4.6 (a) a diagonal line divides the image into two halves. The left half depicts famine in Gaza Strip. A starving boy, half-naked and skinny, is stretching his hands towards a fat man on the right side of the image. The eye lines of other children are also directed to the right side of the image, expecting and begging help. The second participant, or the fatty man, is a *Carrier* of some *Attributes*, like belonging to gulf countries – this can be understood from his dress and the scarf on the head –, more probably to Saudi Arabia, which is perceived as a rich and unsupportive neighboring country. Other attributes, apart from identity, may be obesity, luxury, and greediness. The image producer draws contrast between the starving Palestinians and the neighboring gulf countries that showed limited or no solidarity with Palestinians.

Image 4.6 (b) is more focused on framing famine in Gaza Strip. The participants, in a central position, are three children with messy hair and focused eyes. Their eye lines are directed towards the photographer and the viewer. The hands around the bread symbolize the need for and the shortage of food. What is foregrounded is the children famine, and what is backgrounded is the chaos and destruction that resulted from Israel's attacks. A deeper look at the image shows that the rubble is foregrounded as well, which means that chaos is everywhere

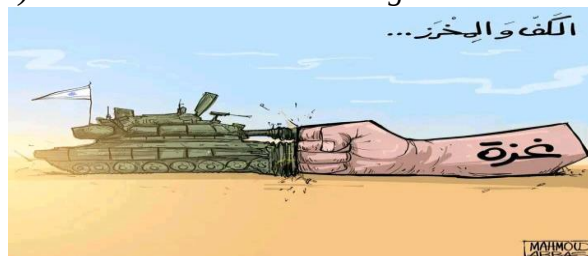
surrounding innocent children in Gaza. The image producer aims to evoke the viewers' compassion and support. The image producer's objective is calling for supporting Palestine and putting an end to aid blockade. It is important to note that the gaze of the three boys engages the eyes of the viewers and stresses the need for help and donation.

Figure 4.7

a) Resistance



b) Armed vs. Unarmed / Strong vs. Weak



Resistance is another symbolic meaning that can be decoded from the above pictures. Photo 4.7 (a) was taken in the colonized territories, and it shows a little boy, holding Palestine's flag and defying the Israeli soldiers. The *Symbolic Attribute* is courage and resistance. The *Carrier* is the boy, and the *Attributes* are braveness, patriotism, and anti-colonialism. The participants' eyes are directed towards an element that is not within the frame of the image. This draws a horizontal vector emanating from the actors towards an unknown recipient, may be symbolizing the uncertain and ambiguous future of the conflict.

Picture 4.7 (b) is a drawing that represents colonialism vs. resistance, power vs. counter-power, imperialism vs. independence, and Zionism vs. Nationalism. The military vehicle is the symbol of oppression, repression, and aggression, while the hand represents opposition, resistance, and determination. On the hand, it is written 'Ghaza غزة' and above it, it is written 'Alkaff'wa almikhras الكف والمخرز', translated as 'Outmatched and outgunned.' This image sums up the conflict between Israel and Palestine over land. This representation of colonialism symbolizes the resistance of the 'primitive' against 'advanced technology'. It also portrays the strength and courage of Palestinians who relentlessly attempt to counteract colonial expansion in kibbutz, or the areas surrounding Gaza.

Figure 4.8

a) Hope from Under the Rubble



b) Determination



In image 4.8 (a), the main actors are three children who seem to be two brothers and a sister. The old boy holds Palestine's flag, while the youngest child wears the Palestinian traditional scarf or 'koufia'. What is common between the three participants is the innocent look of these young children. Their eye lines are *transactional*, addressing the photographer. This image signals hope for a better future. In spite of being surrounded by the rubble, they keep smiling to the photographer. These children are the *Carriers* of optimism and hope *Attributes*.

Photo 4.8 (b) further emphasizes the idea of hope in spite of war and chaos. The vector in this image is vertical, dividing the demolished buildings into two sides. This vector is the road

that still shows some signs of life. A secondary vector can be noticed, which is a diagonal and colorful line that is used as decoration. The walking people on the road signify that life is still possible in that area. This reveals Palestinians' determination to survive against all odds. The shot seems to be taken during Eid Alfitr or feast periods, which shows that this oppressed community insists on celebrating religious occasions in spite of war, hence attachment to religious beliefs and customs.

Figure 4.9

a) *Indigenous People*



b) *Common Fate*



Dressed in red and white koufias and putting the Palestinian flag on her shoulder, the girl in 4.9 (a) is the *Carrier* of many *Attributes*. She is the symbol of indigenous people and Palestinian traditions, customs, and roots. Her smiling face sends positive vibes to the viewers along with her optimistic looks. She also evokes innocence from any guilt. Tackling 4.9 (b) from a semiotic angle, the signifiers are the olive tree, and two old ladies: one is a woman of color and dressed like native Americans or Indians; the second is wearing a veil and a traditional dress. The two women are holding two children and standing in front of an olive tree.

The symbolic or embedded meaning of the tree refers to the Palestinian roots and origins. The tree is the symbol of land and ancient history. The woman on the left is an Indian woman who holds a white boy – or the USA as the child of native America. The second woman is a Muslim woman symbolizing the Palestinian culture and religion. The baby in her hands signals the determination of Palestinians to preserve their existence and the existence of their family names. This reminds the viewer of the fact that, during the war, Palestinian families used to send some of their kids to their neighbors' houses so that they do not die all together. The aim is leaving someone who can preserve the family name and its history in the future.

Figure 4.10

a) *Color Significance*



b) *Color Saturation / Saliency*



Based on semiotics theory and visual grammar approach, focus will be on colors and perspectives in 4.10 (a) and 4.10 (b), along with their *Symbolic Attributes*. In drawing 4.10 (a), the main actor is a Palestinian person revolting against colonists, or the Israeli occupation. The actor is duplicated six times and is oriented towards different directions. The image pictures the dance of victory inspired by Indian Americans' tribal dance. The colors are a mix of the Palestinian flag colors, mainly white, green, red, and black. The dominant colors are orange and grey in the background, hence the prevalence of war, enmity, explosions, bombing, ashes,

and fumes in a stolen land.

In image 4.10 (b), the statue of liberty symbolizes the USA; the knife represents Israel, and the cake signifies the Palestinian territories that are cut into pieces. The presents on the ground may signify that Palestine is offered to the Jews as a gift on a special occasion. The book that is part of the statue of liberty represents the American Declaration of Independence, hence the US sovereignty and freedom. The red substance on the cake refers to the martyrs' blood over the division of Palestinian lands and the wars between Palestine and Israel for liberation and decolonization. The positioning of the book and the knife in opposite sides evokes the contrast between the American Ideals of democracy, freedom, and human rights, and the mere reality of the US-Israeli oppression of Palestinians, depriving them of their basic rights.

Figure 4.11

a) *Innocent Children as War Victims*



b) *Lost Childhood*



The *Symbolic Attributes* in 4.11 (a) are innocence, childhood, peace, and tolerance. The little children are the *Carriers* of innocence and childhood *Attributes*. The white color is the *Carrier* of innocence, while the white birds are the *Carriers* of peace. The Palestinian flag is foregrounded to highlight their noble cause. The white dress and feathery wings portray the kids as angels, carrying peace and love and supporting the Palestinian cause. The white clouds and the journey to the sky symbolize their dead souls seeking shelter in a better world. They may be interpreted by the viewer as reporting the injustice their ancestors and their communities have been facing since 1947 to a higher authority, to God.

In image 4.11 (b), the child is not an actor but an *interactor* that shows fear and anger as a response to aggression and insecurity. The facial expression of the girl as well as her white dress, spotted with red blood, symbolize childhood that is endangered by explosions, missiles, and bombs. Al Aqsa Mosque behind the girl has religious and cultural significance for Muslims. The ancient buildings signal the long history of this old civilization and its roots in the region. Highlighting the mosque, using brighter colors, helps to foreground it as a special and sacred place in the area.

Figure 4.12

a) *Women as War Victims*



b) *The Dilemma of Women*



In both 4.12 (a) and (b), the focus is on Palestinian women and the hellish conditions they endure. In 4.12 (a), the dominant colors are grey to depict fumes, and orange and yellow to portray fire, explosions, and bombs. Women are dressed in black, which signals grief,

mourning, and sadness. Veiled with the traditional Palestinian scarves, they are the *Carriers* of their culture, identity, and religion. The participants are *interactors* since their facial expressions reveal fear and horror. They are also *actors* since they run towards an unknown direction; may be escaping from refugee camps, seeking another shelter. This idea is made clear via the burnt tents behind the women. The text below the picture--“*Allahoma eni ušhhiduqa ani bari’ mina asukūti fa eghfer lanā taqsirana wa qilata ħilatina* / اللهم اني اشهدك اني بريء من ”السكوت فاغفر لنا تقصيرنا و قلة حيلتنا”-- reveals the image producer’s point of view, who is calling God to witness his/her support for the Palestinian cause and praying that ‘Allah’ forgives him/her for not being able to make a change or stop this injustice. The textual clearly unveils the producer’s attitude; hence, it clarifies what is left ambiguous about the visual elements.

Image 4.12 (b) summarizes the dilemma of the Palestinian women, who lost their houses and their cherished children and grandchildren. The old woman represents agony, pain, and despair. Her crying face shows the climax of sorrow and bitterness while looking at the dead kids in her hands. The babies draw a divergent vector that may signal separation, transcendence, and different life roads. Covered with dust and sitting on the rubble, the woman is the *Carrier* of colonial atrocities and war crimes. Her uncovered hair signals the unprotected population under Israeli missiles. She symbolizes a weak and insecure community that fled the atrocities of war in the north of Gaza to be attacked in what is called ‘safe zones’ or ‘refugee camps’ in the south.

Figure 4.13

a) War atrocities: Fire



b) Bomb Attacks



Photo 4.13 (a) depicts a burning man. The participant in this image is a patient that shows no interaction to fire and pain. He seems to be motionless meeting his death without any reaction. The wooden sticks draw three diagonal vectors. The dominant orange color signal the spread of fire in the area. The grey color of the smoke adds a sad shadow that expresses death, ashes, agony, and despair. The patient’s body draws another vector that divides the images horizontally into two halves: fire and rubble. The corpse is surrounded by the rubble of burnt and destroyed items, hence chaos, the dominant theme in Gaza since October 2023.

Image 4.13 (b) highlights the devastating effect of bomb attacks on infrastructure and civilians. The dominant color is grey, with different shades. The sole participant is a little girl who is running to escape from the bomb. The girl is located in the *Periphery* to show the *Centrality* of the smoke. The smoke dominates the image frame, hence giving it more salience and importance. This image pictures one *Part* of a *Whole* territory that suffers from the ravages of an unequal / unjust war, in which Israelis missiles daily attacked unarmed and innocent civilians. 4.13 (a) and (b) signal the calamity of war and its destructive, ruinous, and catastrophic repercussions on innocent souls and starving communities.

Figure 4.14*a) Mothers as Secure Shelter**b) Mothers as Refuge*

In both 4.14 (a) and (b), the image is no longer an illustration; the image carries the meaning. Both images tackle the issue of women and children as victims of the enemy's immorality. In 4.14 (a), a veiled woman sits on her knees on the rubble and holds a child to protect him/her from the bombs and dust. The green and pink colors are condensed to highlight the participants' dilemmas. The grey background adds to the salience of the two war victims. Their body positioning and language enhance *Attributes* like weakness and helplessness.

Photo 4.14 (b) shows a woman covering a child to protect her from cold weather in a refugee camp. The viewer can also see some stones thrown on the ground to fix the tents and endure windy winters. Both children seek a secure shelter in their mothers' bodies. Being close to their mothers carries security and warmth. As such, mothers are the *Carriers of Attributes*, like tenderness, security, warmth, unconditional love, and devotion in hard times. These images expose the unarmed civilians who suffer from the violation of international laws and war ethics.

Figure 4.15*a) Emotional Burden**b) Physical Burden*

According to Kress and Van Leeuwen (2006, p. 114), "interactive participants are real people who produce and make sense of images to different degrees and in different ways, regulate what may be 'said' with images, how it should be said, and how it should be interpreted". In 4.15 (a), the woman's reaction to the loss of her son due to hunger is made clear. The woman's face is foregrounded to highlight sorrow and extreme feeling of pain. Her eyes are directed towards the sky, so she might be complaining to God the atrocities she experienced with her son. Her hands are pulling the body of her dear child to her chest to bid him the last farewell before burying him. A third hand appears in the picture to console the woman. The vector, here, is drawn via the woman's eye line, which is a vertical upward line, directed towards God who symbolizes justice.

4.15 (b) portrays a woman who carries a pillow, some bed covers, and other stuff. She looks exhausted and worried. She is the *Carrier of Attributes*, like weariness about a gloomy future, tiredness of displacement and emigration, and the bitterness of leaving her house behind. This can be read through the frown on her pale face. The psychological burden she is carrying seems to be heavier than the physical burden on her back. The grey color surrounds her since chaos and demolished buildings are around. *Framing* the woman in a central position in the middle of destruction and rubbles highlights the violation of women rights in Gaza and the torture they endure because of the war.

Figure 4.16**a) Child Suffering****b) Child Right Violation**

The violation of child rights and targetting civilians are the dominant *Symbolic Attributes* in these images. 4.16 (a) portrays a child as an *interactor*, who might be crying his dead relatives and his destroyed house. The photographer aims to arouse the viewers' empathy and concern about the Palestinian cause. Based on the sound volume icon in the right bottom corner of the image, we can understand that this image is taken from a video. Loss seems to be the dominant theme in this image since the boy's eyes are *non-transactional*, directed to nowhere, which reveals his lost soul and his desperate mental state.

In image 4.16 (b), child abuse theme is enhanced through the image of a girl that is covered with phosphoric powder. The use of phosphoric bombs is forbidden by the International Law due to their dangerous effects on people. The girl is positioned in a central position to shed light on the detrimental impact of such bombs on innocent civilians. The screaming girl directs her eyes to the photographer in a desperate act of protest to denounce what innocent civilians are going through during the war that has ravaged Gaza Strip.

Figure 4.17**a) Mass Deaths****b) Chaos and Destruction**

Seeing the corpses of Palestinians in white cloth has become a usual daily routine since October 2023. The *vector* in this picture is horizontal dividing the image into two halves. The upper side reveals the miserable state of Gaza cities after Israel's bomb attacks. The lower side shows the dead corpses, wrapped in white cloth to be buried in mass graves. The white color of cloth is splashed with the red color of the martyrs' blood. A crowd of people stands close to the corpses to bid farewell to their relatives or neighbors before burying them. Death and destruction are the dominant themes in 4.17 (a), which evoke the war's disastrous effects on both people and infrastructure.

4.17 (b) also sheds light on the destructive effect of war on both parties. Some Palestinian men stand near an Israeli war vehicle taking some selfies to keep victory memories and share them on social media. Both parties undergo huge losses, whether they are winners or losers. What attracts my attention, as a viewer, is the man who stands on the war vehicle with pride, celebrating victory. This man is given *salience* and importance in spite of his small size in the image. However, the rubble and burnt buildings are located in the periphery in spite of being dominant and prevalent, hence marginalized and trivialized. This invokes a *Center vs.*

Periphery dichotomy or framing.

Figure 4.18

a) *Rejecting Submissiveness*



b) *Rejecting Defeat and Resignation*



Self-esteem and pride are the dominant themes in 4.18 (a) and (b). In the first image, *Aljazeera* journalist Wael Adahdough shows resilience and determination to carry on covering the Israeli offense on Gaza Strip. In spite of losing many members of his family, like his daughters and son, he showed perseverance and dedication to his country and the Palestinian cause. He is foregrounded, while some youths are backgrounded behind him. They are strolling in the area looking for something, may be some corpses or survivors that should be rescued from under the rubble. Observing the image *framing*, the journalist is the most *salient* and the most eye-catching element in the composition, not only because he is placed in the foreground but also because he is the largest element in the picture.

In image 4.18 (b), a young man is proudly sitting on a chair, surrounded by demolished buildings. The message he is sending is that Palestinians are strong and determined to liberate their country whatever the cost will be. Crossing his legs and taking some sips of his cup of tea, he is trying to ridicule his enemy and minimize its sense of victory. Meaning is made via the positioning of the man's body as well as the framing of the image. The viewer has to decode the signs in the image to construct meaning via mental representations. Decoding such messages involves the use of socio-cultural as well as political knowledge about context to understand the visual elements in the image. As such, meaning making necessitates employing cultural, social, political, and ideological knowledge that serves to decode the signs in any image.

Figure 4.19

a) *Defiance of Colonialism*



b) *Determination*



The elements that a viewer can see in this drawing is the back of a man in black, carrying a weapon and running away. On the ground, we can see a helmet of an Israeli soldier on which Jacob's star is printed, and below the helmet, we can see blood. The fighter stepped on the helmet in a humiliating way. The aim of the image producer is devaluing and degrading the enemy to a lower position. This elegant man in a black coat went viral on social media. The drawing portrays a civilian who could successfully shoot a military vehicle in one of the videos on Facebook. He represents bravery, patriotism, courage, and rebellion against colonizers.

Photo 4.19 (b) illustrates the determination of Palestinian fighters. In spite of losing their houses, relatives, and parts of their bodies, they are resilient and determined to fight for

freedom. The freedom fighter in the shot is holding a weapon and kneeling on his amputated legs to defend his country. The same photo can be interpreted by Zionists as a terrorist that is terrorizing innocent Israelis. Driven by ‘a sense of guilt’ that stems from WWII and Adolf Hitler’s ethnic cleansing of Jews, the image viewers may sympathize with Israelis and show a negative attitude towards the amputated man. Hence, the social, cultural, and political assumptions or convictions are important in interpreting images and taking sides in the Israeli-Palestinian war.

Figure 4.20

a) *Starving to Death*



b) *Extreme Hunger*



Photo 4.20 (a) shows the famine that Gaza inhabitants suffer from. The participant is a very skinny boy who seems to be dead or in agony. This six-year old boy was not able to move, and this can be understood via the diapers he is wearing. The boy’s age is given in the textual element “*Attifel Hikmat Bader Saheb al sit sanawat / الطفل حكمت بدر صاحب السنوات الست*.” A nurse, or a doctor, seems to be looking at him desperately. This boy symbolizes Gaza that is agonizing and starving to death. The partially apparent nurse can be the *Carrier of Attributes*, like the helplessness of the medical staff in Gaza and the lack of adequate health care. According to Kress and Van Leeuwen (1996), the metaphoric processes of sign making, the acts of representation and classification are based on complex analogies. These processes are also based on the producers and viewers’ social environment, political ideologies, cultural assumptions, and background knowledge.

Photo 4.20 (b) draws a comparison between the past and the present. The participant in the image plays the role of a *Patient* that suffers from starvation. Due to the shortage of food and supplies in Gaza, around two million of Gaza population experience extreme hunger. 4.20 (b) depicts a *Left vs. Right* dichotomy or framing. The right picture portrays the girl in the past; hence, what is given, while the left image shows what is new; hence a *Given/New* framing. Establishing metaphoric/symbolic relations and cognitive/mental connections between the images and their representations depends on the producers/viewers’ cognitive skills as well as their perceptions of the world.

Figure 4.21

a) *Violation of the International Law*



b) *Violating the Freedom of Press*



In image 4.21 (a), one will focus on the ‘denotative’, ‘connotative’, ‘iconographical,’ and ‘iconological’ significance of the elements, people, places, and things. 4.21 (a) is divided into two parts; the upper one shows a man feeding three cats and some destroyed buildings behind him. On the man’s jacket, it is written ‘PRESS’. That is what one can say when analyze the picture denotatively. However, when the analyst focuses on the connotative meaning of the image, one may infer that journalists and mass media, in general, feed the audience mind, spread knowledge, and diffuse the truth. Based on the *interactive/interpersonal* level of analysis, the viewer is positioned closer to the journalist in the upper image (medium shot) than in the lower one (long shot). These *medium* vs. *long* shots may reveal the photographer’s attitude towards the events. The lower image depicts the same place but at a different time. Images are polysemous and open to a variety of interpretations; that is why we sometimes opt for a verbal text to understand the exact meaning of an image. A tomb is in a *Central* position, and on the stone, it is written ‘Montasser 2023’. More cats are surrounding the tomb, involving different ages and sizes. Connotatively, this means that journalists are not protected from attacks and that the freedom of press is violated in Gaza. The aim is burying the truth and threatening journalists to stop covering the atrocities of Gaza War. The cats are the *Carriers* of loyalty *Attribute*. They are loyal to the person who fed them one day, hence to the entity that educated the audience and reported the truth to the world. As for the positioning of the viewer, the cats are seen from behind. However, the journalist’s tomb faces the viewer frontally.

In 4.21 (b), based on a purely semiotic approach to discourse analysis, one has to identify the *signifiers* in the image first. The biggest element that first catches the viewers’ sight is the drawing of a man who is wearing a helmet. On his uniform, it is written ‘PRESS’. Examining both *visual* and *textual* elements, we can understand that the man is a journalist. What is unconventional in this picture is the absence of the journalist’s head, which is removed by a missile. When the viewer uses his/her *background knowledge*, s/he reads the symbol of Zionism. When s/he deciphers the symbol/flag under the text “made in”, s/he comes up with the conclusion that the missile is made by the USA and is sent to support Israel’s colonialist agenda. Combining the journalist’s image with the weapon’s symbol reveals how the USA and Israel violate the International Law and the freedom of press in Gaza. Killing news reporters in the war against Hamas shows that the International Law and Human Rights are created for some people but not for other people.

Figure 4.22

a) *Beheaded Children*



b) *Smashed Bodies under the Rubble*



4.22 (a) is a drawing that is produced by the discourse emitter to ridicule the American Congress members who applauded after Netanyahu’s speech in the USA in 2024. Applauding the genocide and ethnic cleansing of Palestinians in Gaza was a shock for the opponents of this unjust war worldwide. This war was based on unbalanced powers because Israel targeted civilians, more specifically children. Depicting three men whose hands are tarnished with blood and the child’s cut head, along with the danger/death symbols on the table, reveals the true nature of the American and Israeli governments. No one can justify children killing and civilian mass murder.

As for 4.22 (b), the big-sized and central element in the image is a hand on which it is written “Don’t forget us”. This element is foregrounded and surrounded by the rubble of a destroyed house. The image producer aims to stress the Palestinians’ repetitive calls for help and support. Via this image, the photographer attempts to remind the viewers to continue their support for the Palestinian cause. Opting for the *Frame* of destroyed and demolished houses is recurrent in the images that covered the war between Gaza Strip and Israel. The selection of such a *Frame* aims to highlight the destructive aspect of this war and the prevalence of chaos and anarchy.

Figure 4.23

a) Wall Graffiti / Slogans



b) Supporting an Oppressed Community



In photos 4.23 (a) and (b), the analysis of the textual is as important as the visual. The message “Israel Is A Colonial Project” is written on a house wall in red color. The use of the red color may aim to attract the readers’ attention to Israel’s ‘colonial project’, hence to Hamas just war against colonizers. We can also see two symbols, mainly Israel’s flag and the Bolshevik symbol. The hammer and the sickle signal communism and the Soviet Union. As such, Hamas counter attack against imperialism and colonialism reminds the viewers of the industrial workers and laborers’ revolt against capitalism and for socialism during the Bolshevik revolution. It is clear that the viewer’s use of background knowledge is necessary to decode the meaning in the image and decipher the symbols in it.

In shot 4.23 (b), the text “LAND YOU HAVE TO KILL FOR IS NOT YOURS” is written in capital letters. The black color on a white background helps to highlight the message and give it more *salience*. The use of the red color to write ‘KILL’ stresses the idea that Israelis colonizers are portrayed as blood-thirsty racists who kill innocent people to dominate the country. The second part of the message is “THE LAND YOU HAVE TO DIE FOR IS”. The stressed idea, here, is that Palestinians are dying for their own land where their parents and ancestors lived for centuries. The two messages draw a contrast between colonizers and colonized people, between the invaders and the indigenous communities in Palestine. The contrast signals how colonial powers have to ‘Kill’ to stay in a stolen land, and how natives have to ‘DIE’ to defend their land. It is important to note that the black, green, and red colors are signifiers that evoke the colors of Palestine’s flag. Writing the word ‘DIE’, using the Palestinian flag colors, highlights the idea of martyrdom and fighting for one’s land to death. The textual is supported by the visual by drawing the Palestinian flag below the message.

After analyzing some samples of the collected images, based on the representational, the interpersonal/interactive, and the compositional meanings, more focus, in the following section, will be on the compositional dimension of Facebook visual corpora.

4.2 The meaning of composition

In this research, we have considered the way images reflect the relations between the people, places, and objects they depict and the set of relations that may be established between the

images, image producers, and image viewers. Focus, at this level, will be on the three interrelated elements, namely information value, salience, and framing.

4.2.1 Information Value

The information values, attached to the different ‘zones’ or locations of the elements in the images, can be classified as left and right, top and bottom, and center and margin.

4.2.1.1 LEFT vs. RIGHT: THE GIVEN vs. THE NEW. The left-placed elements are generally presented as Given for the communities that write from the left to the right, while the right-placed elements are commonly presented as New. To consider something as Given means that it is presented as something the viewer already knows, as “a familiar and agreed-upon point of departure for the message” (Kress and Van Leeuwen, 2006, p. 183). For instance, in image 1 (b), what is seen on the left of the viewer is a strong young man who was full of energy and strength. However, on the right of the image viewer, the analyst notices an exhausted man who is weak and mentally unstable. This Left/Right division unveils the difference between Past and Present, hence what is *Given/Known* and what is *New*.

Another example is image 9 (b) where the Indian woman is depicted on the left, hence presented as *Given*, or *Known*. The Palestinian woman is positioned on the right; hence, what is *New* for the image viewers. This Left/Right connection links the history of the native inhabitants of America and the ethnic cleansing they were subjected to by white new-Americans to the recent events in Gaza Strip and the ethnic cleansing of Palestinian indigenous people by Israeli colonizers. This Left/Right or Given/New division sets a comparison between two similar experiences of two exterminated native communities.

4.2.1.2 IDEAL vs. REAL: TOP vs. BOTTOM. Based on Kress and Van Leeuwen (2006, p. 186), the upper section visualizes the IDEAL, or the ‘promise of the product’. However, the lower section visualizes the REAL, or the product itself, providing more or less facts/information about it. Image 10 (b) may be a good illustration of this Top/Bottom division. At the Top of the image, we can see the American Liberty Statue that evokes the American ideals of freedom, sovereignty, and independence. However, in the Bottom of the image, we see a big cake that is decorated with the Palestinian flag and from which blood comes out. This *Top/Down* depiction invites an *Ideal/Real* depiction. Indeed, the US support of Israeli bloody war is in stark contrast with the American Ideals of freedom, sovereignty, human rights, and dignity. The idealistic view of the US, depicted via the Liberty Statue, is shattered into pieces after the US ‘de facto’ support of Israel’s invasion on the Palestinian territories.

Another example is image 11 (a), in which the Palestinian flag evokes the Ideal, or the idea of Palestine’s independence and self-governance. However, the children in the Bottom signal the mere reality of martyrdom, death, and lost childhood in a stolen land. This image establishes a Top/Down division and an Ideal/Real dichotomy that shows the contrast between what is supposed to be and what the real situation is in Palestine. This idea can also be expressed via 11 (b), where Al Aqsa Mosque symbolizes religion, faith, and peace, hence the Top/Ideal, while the fumes, bombs, and the screaming girl represent the Bottom/Real.

4.2.1.3 CENTER vs. MARGIN. The visual composition is also produced based on the dimensions of *Center* and *Margin*. To generalize, a visual composition locates/places one element in the Center, or the middle and the elements surrounding it in the Margin. When something is depicted as Central, “it is presented as the nucleus of the information to which all the other elements are in some sense subservient. The Margins are these ancillary, dependent elements” (Kress and Van Leeuwen, 2006, p. 196). In many images of the present visual corpus, the margins are identical or at least very similar to each other, like the rubble around the

Actors/Interactors in 6 (a), 6 (b), 8 (a), 8 (b), 14 (a), 15 (b), 18 (b), 21 (a) and 22 (b). There is no division between Given vs. New and/or Ideal vs. Real elements among them.

In 3 (a) for instance, the woman who is hanging a tree is located in the Center, while the military vehicle behind her is backgrounded or marginalized in the Margin. Locating the Israeli soldiers in the back may embed negative connotations, hence trivializing and minimizing their effect on a determined woman who shows resilience and defiance to protect her land. The olive tree is given salience and focus to highlight the importance of land to the indigenous inhabitants of Palestine. Locating the olive tree in the Center reveals that the ancestors' land and colonial expansion are the main reasons for the Israeli- Palestinian conflict.

In 22 (b), the central position of the hand shows the importance of the message. The textual mode "*Don't forget us*" supports the visual mode to send a message to the world to give a 'helping hand' to a perishing community. The shot taker aims to attract the viewers' attention to an annihilated civilization. The rubble is in the periphery, and it surrounds the hand. Thus, the peripheral is not always marginalized; it may signal centrality and significance since it surrounds the most salient element in the image, hence emphasizing the central element.

In 19 (a), the Center vs. Margin dichotomy is clear in the drawing. The big size and the centrality of the Palestinian fighter adds value or significance to the participant or agent in the image. However, the Israeli soldier's helmet on the ground is marginalized in the *periphery*, or the *bottom*. The small helmet on the ground is trivialized and devalued, while the fighter in black is magnified and valued. This also leads to other dichotomies, such as oppressed vs. oppressor, invaded vs. invader, colonized vs. colonizer, landowner vs. land rapist, hero vs. coward, freedom fighter vs. freedom oppressor etc.

4.2.2 Salience

The following are some illustrations of salience from the corpus. An illustration of the choice of colors is image 23 (b), where the image producer uses white and black to add more salience to the message s/he wants to transmit to the viewers. In addition, the red lines on a light background in 22 (a) may be interpreted as an attempt by the artist or image creator to grab the audience attention to the bloody nature of the American Congressmen who applauded children killers, like Netanyahu. The use of vertical and large red lines reveals high salience and clear importance in the viewer's visual field. Likewise, colors in 14 (a) are highly saturated in the main elements or Actors, while they are soft in the background, like light grey. Using saturated colors on a light background has a greater influence on the viewer.

Apart from information value and salience, framing is another important element in analyzing the various modes of compositional meaning making.

4.2.3 Framing

Framing is the third component of the compositional meaning. According to Kress and Van Leeuwen (2006), the presence or absence of framing means connecting or disconnecting elements of the image. Visual framing is based on degrees, ranging from strongly to weakly framed elements. The stronger the framing of an element, the clearer it is depicted as a salient unit of information. In the present study, Linear vs. Non-linear and Part vs. Whole compositions are examined.

4.2.3.1 LINEAR vs. NON-LINEAR compositions. Linear images are ordered like movies, and the audience has no choice but to follow the images in the order that has already been decided for them. However, with non-linear images, audiences can select the images and view them in an order that is determined based on their preference. In this research, linearity is not

part of the research scope since the images are collected separately and randomly from different Facebook pages, accounts, or groups.

4.2.3.2 PART vs. WHOLE compositions. They are the way the Parts are integrated into a meaningful Whole. In other words, the composition of the whole is how the representational and interactive parts are related to one another. In this context, we can mention image 3 (a) in which the olive tree represents a Part of a Whole; that is a part of a whole country. In 3 (b), the brick represents a part of Palestine/the Whole. Add to that, 10 (b) involves two parts, namely the Liberty Statue as part of the USA, or the whole, and the cake/flag as part of Palestine, or the whole. These parts are signifiers from a semiotic point of view, while the USA and Palestine are the signified. This Part/Whole relationship helps the viewers decode the meanings of visual modes. 19 (a) and 22 (b) also include parts of wholes, like the helmet in 19 (a), which is part of a soldier, hence colonialism, and the hand in 22 (b), which refers to civilian victims who witness the atrocities of war. The hand is part of injured bodies, or - in other cases - dead corpses under the rubble.

In short, visual modality results from the degree to which certain aspects, like color, representational detail, salience, tonal shades, positioning, and framing, are used. These aspects or dimensions can be perceived in terms of scales, ranging from the absence of any detail to the maximal presence of detail, or from the absence of any color to highly saturated colors.

4.3 Discussion

At this level, we have to question the reliability of the analysis as well as the authenticity of the images. Do these images report facts, truths, or attitudes? As analysts, we attach more credibility to some messages more than other messages based on our cultural backgrounds, ideological assumptions, or political agendas. According to Kress and Van Leeuwen (2006), “the truthfulness, doubt or certainty depend on modality markers which have been established by the groups within which we interact as relatively reliable guides to the truth or factuality of messages, and they have developed out of the central values, beliefs and social needs of that group” (p. 154). As such, sign-makers or image producers select what they consider as suitable, expressive means for transmitting the messages they want to express (Kress and Van Leeuwen, 2006). Subsequently, we focus on the set of signs based on such choices, which are sometimes specialized modality markers. These modality markers belong to a more general range of meaning-making means of expressing truth vs. falsehood, fact vs. fiction, certainty vs. doubt, credibility vs. unreliability. In this regard, Kress and Van Leeuwen (2006) point out that “a social semiotic theory of truth cannot claim to establish the absolute truth or untruth of representations. It can only show whether a given ‘proposition’ (visual, verbal or otherwise) is represented as true or not” (p. 154). The truth arises from the values and beliefs of a given social, political, cultural or ethnic group.

Departing from these linguists’ thoughts, one can note that images often portray people, objects, and places as if they were real, as if they really existed in the way they were presented or as if they were imaginary drawings or cartoons. In the present research, the Facebook images are taken from the accounts, pages or groups of Palestinians who live in Gaza. Some of these images went viral on social media and resulted in mass support or protest, like 1 (a), 2 (a) and 2 (b). These images reflect reality because they were reported by war victims or/and the journalists of reliable media outlets, like ‘Al Jazeera’ news reporters. Other images reflect the attitude of the producers or the viewers who share them, like 22 (a) and 23 (b). Delivering and interpreting visual discourse relies heavily on the producers and/or the viewers’ knowledge states, their ideological background, their cultural conviction as well as their political orientation. Our support of one group and opposition to other groups depend, to some extent,

on the ethics and principles we adopt. However, the unconditional support of some western communities in England, Germany, Italy, Spain, the USA, and Canada, reveals that humanitarian principles and ethics are universal. Supporting a just cause does not depend on religions, cultures, ethnic groups, or political agendas. Many communities in the east and the west have opposed their governments and called for ceasefire and humanitarian aid for a vanishing community in Gaza Strip since October 2023. As such, we cannot totally assume that the viewers' interpretation of visual corpora is based on social, political, or cultural backgrounds. Western and eastern voices of protest have denounced the dehumanizing treatment of Palestinian detainees and the genocidal war on Gaza Strip.

5. Conclusion

In this chapter, we have attempted to unveil how the collected corpora form a potential for the representation and communication of meaning through the analysis of visual and textual elements. We have seen that social semiotics aims to describe and understand how people produce and communicate meaning in specific settings via Facebook visual corpora to reveal the atrocities of war on Gaza Strip. Until now, written language has been highly valued and frequently analyzed in our society. However, each semiotic mode -the visual, the verbal, the gestural, etc. - has its strengths and its limitations. Moving from a central reliance on one mode -the textual- to a central reliance on multimodality -the visual and textual in this case- will definitely influence the audience (readers/viewers) interpretation. Visual elements in discourse support the textual elements to uncover social injustice, denounce war atrocities, and call for social and political change.

Taking the example of Facebook images, it has been shown, at the representational level, how the images' narrative, conceptual, and textual analyses reflect the participants' reality and the dilemmas of war in Gaza Strip. At the interactional/interpersonal level, the relations between participants, on the one hand, and image producers and viewers, on the other hand, have revealed rejection and objection towards Israeli atrocities, and empathy and solidarity with war victims. At the compositional level, it has been shown that the participants' positioning and framing unveil the conceptual, perceptual, and symbolic meanings expressed in each image. More salience is given to an agonizing community facing hunger and extermination.

As far as modality is considered, the collected Facebook images have been collected from reliable sources on Facebook. Many of these visual elements have been widely shared on social media networks, and they have created a buzz among the supporters or the opponents of Hamas or Israel. Finally, the idea that image interpretation may be influenced by sociocultural and political factors has been relativized since it cannot be applicable with Jewish, western, and Christian communities and other religions and cultures that marched and revolted against this unjust war. However, focusing on other media corpora may lead to different results and shed light on the ambivalence of media discourse in covering war between Israel and Palestine, on the one hand, and other international conflicts, on the other hand. We may come up with the conclusion that sponsored and biased mass media powers are more human with some people and less human with others.

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Discourse Crisis in Tunisian Street Billboard Advertisements: Exploring Advertising Appeals and Their Linguistic Choices

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Abstract

Billboard advertising is an outdoor marketing technique used to widely diffuse publicities of different brands of clothes, food, telecommunication companies and new products. Usually, advertisements are composed of concise and catchy slogans written on banners accompanied by some visuals and other graphological features. However, some of these adverts represent a crisis in the advertising discourse because of the disruptive use of language and the obscurity in expressing intentions appropriately. As a result, advertisements are confusing, thought-provoking and shocking at times, causing misunderstanding and a breach in communication. The receiver has to activate his/her background knowledge to infer and reach the implied meaning. Advertisers resort to a variety of appeals in order to engage the audience and communicate more than what is written on billboards. The qualitative analysis based on an inductive thematic analysis aims to explore the different advertising appeals along with the employed linguistic choices and locate the crisis in the advertising discourse. After collecting 115 street billboards from Tunisian websites, the data was coded by labelling each ad with its corresponding appeal. Afterwards, similar codes with recurrent patterns were grouped together into broader themes. Results have shown that negative emotional appeals, unlike the positive emotional appeals and rational appeals, cause communication crisis because of lack of linguistic creativity when formulating the ads' texts. Most importantly, the researcher has theorized a new type of appeal that has been recurrent in the street billboard which is the pragmatic appeal that arouses curiosity and has distinctive features like brevity, implicature, and inference.

Keywords: advertising, billboards, appeals, crisis, emotional, pragmatic, street

1. Introduction

Advertising can be performed and diffused, using different modes and various channels of communication that might be audiovisual or printed. Advertising types might include, among others, print advertising (newspapers and magazines), social media, mobile advertising or billboard street advertising. Alternatively, Janoschka (2004) has distinguished between two types of advertising: the traditional advertising and online advertising. The first type involves print ads like TV and radio commercials billboard while the second one is mainly about direct mailings like coupon ads etc. The current research stems from an interest in a special visual mode of advertising, namely billboard street advertising which has also been referred to as out-of-home billboard (Turnbull, 2022), or street advertising. It is an outstanding marketing and communication technique in advertising. According to Daniels (2009), billboard advertising comes in two forms: indoor and outdoor. The former consists of small signs placed in venues such as restaurants, movie theaters, sports clubs, bars, shopping centers, etc.; while outdoor advertising refers to large signs one can see on highway, or on sides of buildings. Overall, the billboard advertising process is usually carried out by placing huge visible roadside banners to facilitate their perception by passers-by and grab the drivers' attention. Billboards often consist of an attractive graphic design and smart mock-up techniques to transfer meaningful messages to consumers and urge them to buy the promoted products.

Cook (2003) has distinguished between ‘product ads’ that sell products or services and ‘non-product ads’ for charities and political parties. The main advertising function is to promote some brands and increase sales and/or public awareness about new products. Tellis (2004) asserts that advertising is essential for competitive markets and that it is a major means of competition among firms and brand names that compete with each other for sales. On advertising and competition, Callen (2010) offers some strategies to compete with market leaders:

The only way to be noticed today is to be different, be unexpected, and stand out. So your best strategy is actually to differentiate your advertising as much as possible from what the market leader is emphasizing or doing to advertise. You have to carve out your own niche in the customers’ minds and own that niche. (p. 28)

Subsequently, to serve this function, billboard street advertising designers resort to some specific visual and linguistic strategies to capture the attention of drivers and passers-by. Mogaji (2021) argues that, in advertising designers often opt for some creative elements and choices like visuals and audios elements to communicate the message for the brand. The visuals (like images, text color, text layout, and audio) include voice-over, music and length of advert. Most often, messages are sent to consumers implicitly and indirectly causing some confusion to the recipient, leading to misinterpretation and a crisis in the advertising discourse. Other strategies might be metaphors as “metaphor can be used to frame messages in an indirect yet persuasive manner” (Sobrino et al., 2021, p. 8). These very authors argue that metaphors carry different meanings to different people and represent a risk of misinterpretations.

Emotional appeals are also marketing strategies that are used to grab consumers’ attention and bother their minds about the promoted product by using specific linguistic strategies to foreground the brand and/or product. Nevertheless, advertising appeals aim at catching the attention of target consumers and triggering their emotions in unconventional ways that shock, confound or leave the recipient perplex about the intention and the interpretation of the advert. The current research addresses this issue by exploring the different advertising appeals used in Tunisian outdoor billboard advertising and their matching linguistic choices used to realize them. The research is an attempt to answer the following research questions: (1) Which advertising appeals and linguistic choices are spotted in Tunisian street billboards? (2) What type(s) of advertising appeal represent a crisis in Tunisian street billboard ads?

The objective is to contribute to the existing literature on advertising discourse and expand research on billboard advertising in particular.

2. Literature Review

2.1 Advertising Models and Theories

Marketing experts have always attempted to develop different marketing models to commercialize their products at a profit and increase their sales revenue. For instance, the AIDA marketing model was created by the American advertising advocate Lewis in 1898. It consists of four stages: Attention, Interest, Desire, and Action. Yet, “despite its age, the AIDA concept is still in effective use by advertisers and copy writers, perhaps because of its precise simplicity in covering the main aspects and functions of advertising communication (Janoschka, 2004, p. 19). Indeed, grabbing attention and arousing interest in the promoted product is the main target of all ad designers and that if reached, would make consumers think about the product and act by making a purchase. Most recently, Turnbull (2022) argues in favor of the Advertising

Trigger Theory which conceptualizes the process of advertising as a three-stage process made of three actions namely disrupt, engage and trigger. Turnbull (2022, p. 24) further explains that “the first stage, “disrupt”, gains the attention of the audience. The second stage, “engage”, connects with the audience, while the third stage, “trigger”, is the encouragement to change behavior or attitude.

2.2 Advertising Appeals

For more efficiency, any brand usually has its target market which is “the group of prospective customers to whom your offerings are most likely to appeal” (Callen, 2010, p. 4). Creating appeals must rest on creativity while designing the advertisements. Tellis (2004) argues that advertising is a powerful force, and creative advertising in particular is often used to launch new successful products. Turnbull (2022) asserts that “ensuring advertising is original is the key to the success of any campaign” (p. 38), since creativity in the design definitely stimulates the consumers’ curiosity and urges them to discover and buy the given product. Basically, “advertising appeals are used to influence consumers’ attention towards the advertisement and attitude towards the brand” (Mogaji, 2021, p. 107). Mogaji (2021) advocates two types of appeals and further explains that “advertising appeals are the conscious creative decision made regarding the development, content, layout and distribution of a marketing, campaign, either to appeal to your brain – rational appeal – or appeal to your heart – emotional appeal” (2021, p. 108). In other words, rational appeals have a cognitive function that targets the logic and thinking while emotional ones have an affective function in marketing.

Turnbull (2022) argues that rational appeals include a variety of approaches that highlight the qualities of a given product to commercialize the product, including demonstration, price-led, comparison and science-led. Whether rational or emotional appeals, the aim is to influence consumers and grab their attention to buy the product. Emotional appeal, as the name indicates, takes into consideration the consumers’ emotions feelings and psychological states. In short, “emotional appeals are meant to appeal to consumers’ hearts, making them feel special, and a part of the brand” (Mogaji, 2021, p. 108). The focus in this research is on all advertising appeals used in billboard advertising, and how they disrupt the consumer to gain his/her attention.

According to the literature, emotional appeals are twofold: negative and positive. Negative emotional appeals inspire feelings of fear, guilt and shame while positive emotional appeals include love joy and excitement (Mogaji, 2021). Zheng (2020) assumes that marketers usually use four types of negative emotional appeals in advertising, namely fear guilt sadness and anger. According to Turnbull (2022), there are a number of different emotional routes that advertisers can use, and the more common emotional appeals are humor, fear, guilt and shock besides “other types of appeal used by advertisers, such as celebrity appeals, expert appeals, slice-of-life appeals, storytelling and sex appeals” (Turnbull, 2022, p. 33).

2.3 Crises in Billboard Advertising

Whether negative or emotional appeals, they both disrupt the audience by using specific designs, pictures and messages. Daniels (2010) recommends keeping the billboard message brief, eye-catching and big enough to be read by the audience while driving. The billboards tend to have catchy slogans, written on large banners accompanied by some visuals and other graphological features. However, some of these adverts might represent a crisis in the advertising discourse because of the disruptive use of language and the deliberate obscurity in expressing intentions. As a result, messages conveyed by commercials happen to be confusing and shocking at times causing misunderstanding and a breach in communication. By the same token, Goddard (1998) maintains that “adverts can sometimes want to shock the reader for very

good reasons” (p. 12), and that “one attention-seeking strategy developed in recent years to increasing levels of sophistication is the startling image” (Goddard, 1998, p. 11). Commercials work on this ‘shock effect’ by using negative emotional appeals more than positive emotional ones for negative appeals disrupt the consumers’ minds and engage them later to establish a connection between the ad and the audience. Using negative emotional appeals becomes a marketing strategy to incite people and persuade consumers with a newly released product.

However, “customers are creatures of habit. Once a brand becomes a market leader, people are very reluctant to change their perceptions” (Callen, 2010, p. 27). Indeed, changing customers’ perceptions is not that easy as they have their own convictions, choices and attitudes towards their preferable brands. Therefore, using emotional appeals, mainly negative ones, coupled with a strong advertising text and/or messages, might shock their perceptions, shake their minds and trigger their attention in order to try the promoted product by either enquiring about it or buying it.

Likewise, advertisers resort to the power of language and their texts that tend to be catchy, short and straightforward thought provoking. Edouihri (2024) confirms that the power of language in the advertising discourse is capable of raising customers’ emotions and addressing their cognitions to commercialize any product better than any other means of communication. He further argues that “it is undeniable that the power of language is a major element in manipulating and controlling customers’ perception and appreciation of the product” (2024, p. 3). Not only is a powerful language capable of generating such an impact on consumers, but also a powerful image can have the same forceful influential effect. In billboard advertising, coupling the power of language and linguistic variation with colorful, attractive and large images can only seize people’s imagination and mark their routes. In a similar vein, Brader (2006) asserts that contemporary political advertising is saturated with emotional appeals as a dominant tool in election campaigns and that the persuasive power of campaign advertising depends on whether an ad appeals to fear or enthusiasm. He adds that “ad scan and do appeals to other emotions (e.g., anger, pride, sympathy, amusement)” (Brader, 2006, p. 5).

After reviewing the literature of the different advertising theories and appeals with a special focus on crises in billboard advertising, the next section offers an overview of how research on advertising appeals and linguistic choices will be conducted.

3. Methodology

This section acquaints the reader with the research design, data collection and its sampling and a detailed account on the different steps of research procedure.

3.1 Research Design

The research design is basically qualitative with an inductive thematic approach. The inductive qualitative research design is a widely used method of logical thinking based on an inductive view of the relationship between theory and practice by moving from the individual to the general in order to produce unanticipated findings, based on the evidence gathered along with the explanation of its dynamics (Zou & Xu, 2023). Creswell & Creswell (2018), for their part, confirm that “qualitative researchers typically work inductively, building patterns, categories, and themes from the bottom up by organizing the data into increasingly more abstract units of information” (p. 257).

Therefore, thematic analysis is a qualitative, data-driven, in-depth analysis method of vertu, which is recommended in research to identify recurring themes, ideas and topics.

3.2 Data Collection and Sampling

The data that consists of street billboard ads was collected online from various Tunisian websites such as *IMS outdoor*, *Tunisie Numerique*, *Realités.com.tn* and *Brands.tn*. 115 street billboard ads, stretching over the past ten years, were sampled. The sampling of advertisements was done through the maximum variation sampling technique which is a subtype of purposive sampling, used mainly “to ensure as wide a variation as possible in terms of the dimension of interest” (Zou & Xu, 2023, p. 27). This technique is also used in qualitative research to gather a wide range of billboard ads and maximize their diversity.

3.3 Research Procedure

Thematic analysis is proceeded by data analysis inductively which rests on “building from particulars to general themes, and the researcher making interpretations of the meaning of the data” (Creswell & Creswell, 2018, p. 41). Therefore, the analysis was carried out through data coding by labelling each ad with its corresponding appeal. Then, similar codes with recurrent patterns were grouped together into broader themes to answer the first reseach question. Themes and codes were double checked to ensure that the coded ads are pertinent to the generated themes which in turn correspond to different appeal types. The themes were then developed into theories and generalizations that can be contrasted with related existing theories in literature. Finally, the final thematic sets of data were further analyzed to give an account of the linguistic choices made by advertisers to achieve those appeals. This would provide an answer to the second research question.

4. Results and Interpretations

The results investigated four major themes, namely rational appeals, positive emotional appeals, negative emotional appeals and curiosity appeals. The inductive thematic analysis in the following sub-sections will link the aforementioned appeal types and their illustrations with the different linguistic choices chosen by advertisers to promote some products and brands.

4.1 Rational Appeals

Rational appeals address the brain and disrupt the consumer cognitively. Tunisian street billboards particularly focus on the price, high performance, advantages, optimization as well as direct address.

4.1.1 Price

Mentioning the price in bold, large-sized, centered or left and right-sided within the billboard is mostly associated with brands of clothes, household devices, fast food and flight companies.

Figure 1*Priced Street Billboards***4.1.2 High Performance**

To foreground the high performance of some products such as shampoo and toothpaste, advertisers tend to highlight figures in the two first ads (e.g. 10X, 2X), in order to underline the efficacy of the product. Marketers also use words in bold that collocate with the concept of high performance like 'القوة' meaning strength in English, coupled with the Superman iconic figure that denotes superpower. Alternatively, metaphor is used to illustrate the longevity of the brand 'Reynolds' by saying that the pen may last more than a friend and alluding to ephemeral friendship nowadays.

Figure 2*High Performance Street Billboards*



4.1.3 Advantages

Advantages are mostly used to remind the customers of the products' good quality. There is a recurrent word, semantically associated with food ads, which is 'الينة'. The latter is a Tunisian Arabic word meaning savor and good taste in English. The same intention is expressed through Standard Arabic by using 'المذاق الرائع' to promote the 'Nescafé' brand. Telecommunication companies tend to highlight the gains and advantages of their offers by either using percentages e.g. '1000000%, 300% bonus' or code-switching across French and Tunisian Arabic (e.g. SMS شبعة), meaning a lot of SMS, to stress out abundance and the generosity of the offer.

Figure 3
Advantages in Street Billboards





4.1.4 Optimization

Optimization is a rational appeal that addresses the consumers' brain to persuade them about the efficiency of the product by using some linguistic choices. A common linguistic choice is the use of the superlative form of the adjective 'good' and 'fast' in Tunisian Arabic like "أحسن" / "أسرع" respectively. Also, code-switching across French and Tunisian Arabic in the Ooredoo billboard ad "Ti bien sur reseau Ooredoo 5ir". The last word "5ir" is a superlative used in Tunisian Arabic and used in the ad under the form of transcription. Moreover, both telecommunication companies *Orange* and *Tunisietelecom* are optimized in outdoor billboards by using Tunisian Arabic idioms like "الانترنت متمسمة علينا/انترنت وحدو" which are used to persuade the customers that the promoted company is unique and the best in its field.

Figure 4

Optimized Street Billboards





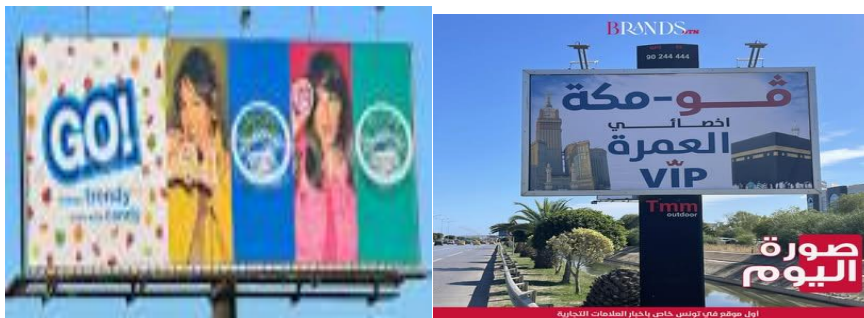
4.1.5 Direct Address

Using the imperative form of verbs in billboard advertising as shown in this sub-section seems to be an effective strategy to influence consumers, urge them indirectly to react and buy the product. Using the direct address form in Tunisian Arabic (e.g. شرجي ابدل اكون انزل), that is charge, change, be and press respectively, is an effective strategy to get closer to the customers' brains, engage them and later cause a change in their attitude or consumption behaviour. Also using the imperative verb “go” whether in English or transcribed in ََ Arabic as “وَفْ”.

Figure 5

Imperative Street Billboards





4.2 Positive Emotional Appeals

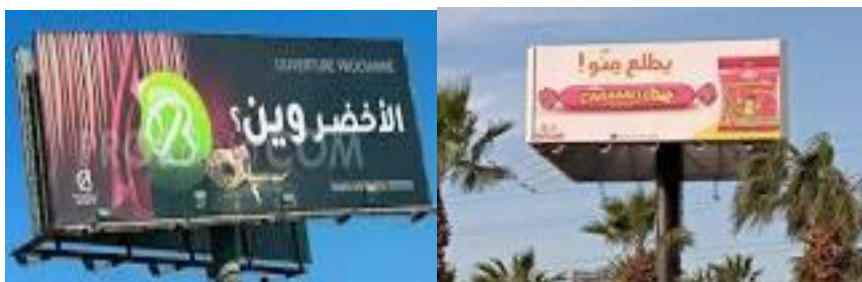
Positive emotional appeals in Tunisian street billboards have an affective function which is meant to capture the attention of consumers and stir their emotions like humor, love and friendship, solidarity, joy and pleasure and finally patriotism.

4.2.1 Humor

Humorous street billboards are featured through sarcasm in the 'Delice' brand and the yogurt ad, and it is the adjective phrase "عائلة عظيمة", meaning in English 'a great family', that triggers this sarcasm. The advertiser is creating parallelism through reproducing the famous Arabic proverb "وراء كل رجل عظيم امرأة" by keeping the same structure and substituting the noun phrases with new ones while naturalizing the proverb. Alternatively, the hashtag "رشف ب ليها" which is an intentional slip of the tongue for the Tunisian Arabic expression "بقلة ليها" that is often used to denote nonchalance and encouragement to take action. In this context, it is intended to incite consumers to try out the new Ooredoo offer. As for the ad "الاخضر وين", meaning where's the green one, people always confound Ben Yaghlane with the green shop sign and the other Ben Yaghlane with the yellow shop sign. Referring to this trade name as 'green' is indeed hilarious and further reminds the consumer of the rivalry between both local grocery shops. As for the last example, the use of the Tunisian Arabic idiom "يطلع منو" makes it humorous. This very idiom is used to mean that something good and unexpected is found out. Applying this idiom to a candy advert triggers humor and at the same time urges consumers to buy the product as the good taste and quality of the candy is already anticipated and even guaranteed in the ad.

Figure 6

Humorous Street Billboards





4.2.2 Love and Friendship

Cheerful pictures of united family members like dad-daughter relationship, happy couples and friends may only enhance positive vibes and feelings. Words that collocate with love like, “صحابك / محبة”, meaning ‘affection’ and ‘your friends’ respectively, are chosen deliberately to enhance the warmth of human gatherings and celebrate friendship.

Figure 7

Love and Friendship in Street Billboards



4.2.3 Solidarity and Patriotism

Solidarity is denoted through the use of a common idiom in colloquial Tunisian Arabic “كلنا علي فرد كلمة” that has a metaphorical meaning to convey solidarity, unity and common goals. Moreover, attention is gained in the following street billboards through promoting ads about Tunisia that arouse patriotic feelings. Pictures of the Tunisian flag, stadiums, sports culture, landscapes and different spots in Tunisia are brought to the forefront by using words that collocate with patriotism like “تونس فخرتنا / التوانسة/بلادنا/البلاد”.

Figure 8
Solidarity and Patriotism in Street Billboards



4.2.4 Joy and Pleasure

The audience can be engaged by joyful billboards that either include pleasant emojis and smileys or Tunisian Arabic cultural words that rhyme well with the concept of joy like “اتفرهد / الخوخ الي يحفل الربوخ / فزاني مرتاح ياتفاح / لمتنا زهات /”. In the last two examples of ads used to promote a brand of soft drinks, advertisers make use of phonological parallelism through reiterating the sounds “ح” and “خ” and a vowel elongation to underline the sense of happiness. Moreover, “الربوخ” and “فزاني مرتاح” are typically Tunisian musical types that are popular among certain social classes in Tunisia on festive occasions.

Figure 9*Joy and Pleasure in Street Billboards*

4.2.5 Optimism

The billboards illustrated in Figure 10 are expected to send positive vibes to the consumers by reassuring and comforting them. Messages like “شي ما راح نجيبولك كل شي اتفرهد واش عليك”, meaning respectively ‘nothing is lost, we deliver everything to you, enjoy yourself and don’t bother’ are essentially meant to promote new offers and provide facilities either in payment or delivering goods. Another way of expressing optimistic messages is to use expressive indirect speech acts like “محلّك” which functions as a compliment meaning in English ‘you are beautiful’ to promote a shampoo by ‘Nihel’ brand.

Figure 10*Optimism in Street Billboards*

4.3 Negative Emotional Appeals

Crisis in advertising discourse has been detected within negative emotional appeals that were mainly used to create a buzz. Indeed, the lack of linguistic creativity in formulating the

advertising texts of the ads below appealed to negative emotions like discomfort, sadness, warning and threat.

4.3.1 Discomfort

The negative feeling of discomfort has been triggered by the following billboards, as displayed in Figure 11, which represent an unusual branding among the Tunisian society that caused criticism and discontentment in social media. In view of promoting a new agency, majoring in managing divorce, the advert has rendered divorce commonplace and has even implicitly encouraged couples to divorce by facilitating its procedures. Moreover, in order to commercialize the sale of ties, advertisers have opted for a sexist ad that depicts a woman apologizing on Valentine's day, which stigmatizes the image of women in the Tunisian society. Furthermore, using a food label “بوليس مكتف”, meaning ‘a wrapped policeman’ which is a traditional meal in Tunisia to promote an oil brand and adding the cop hat in the same ad to foreground the literal meaning of this very expression, have caused extreme resentment and offence among the police community that subsequently asked for withdrawing the ad.

In a similar vein and with the same lack of linguistic affinity, the ad for *Randa*, a pasta brand, marketers have used two reckless Tunisian expressions “يراني مرحي” and “يراني معجونة”, to refer to the tomato wishing to become a sauce and the cheese to be shredded, which have some negative connotations that evokes death and. Likewise, the disruptive sexualized posture of the man and the young girl sitting in his lap posing for a clothes brand has been perceived as offensive and embarrassing as it might be reminiscent of pedophilia, which showcases another fact of crisis in discourse.

Figure 11

Discomfort in Street Billboards



4.3.2 Sadness

Feelings of empathy and deep sorrow have been brought about by the billboards in figure 12 that appeals to sadness and sorrow to remind passersby of our deep support for the Palestinians' cause and their constant struggle for freedom. The message is both poetic and metaphorical by using some stylistic devices like lexical parallelism through reiterating the

word Palestine twice, and consonance by repeating similar sounds in the middle and at the end of both lines.

Figure 12
Sadness in Street Billboards



4.3.3 Warning

Billboards that warn the audience about the danger of staying home and keeping physical distance during the Covid pandemic time, that took place between 2020 and 2022, have been using directive speech acts like “ماتخليش/ امنع/ شد دارك” to convey the intention of advising people to keep safe and stay home. Punching the man in the face is a violent act to warn people against the danger of using plastic bags and make them aware of their ecological danger.

Figure 13
Warning in Street Billboards



4.3.4 Threat

The following billboards diffuse a sense of threat to the audience with the the image of a bleeding knife and a scary message that reads “اتلك فأتلك ف”, meaning ‘I will certainly kill you’ which is a face threatening act. This is a very unpleasant farce to promote and prepare for the selling of sheep during the pre-Aid Al-Edhha period which is a religious celebration where sheep are sacrificed and slaughtered following the Sunna.

Furthermore, “الحبس ما يوقفناش” is another threatening message advertised by the political party “9alb Tounis”, meaning *the heart of Tunis*, after arresting its leader Nabil Karoui in

September 2019 to express the determination of the party to continue their political campaign and the election candidacy. As for “موش لازم تقرأ”, translated as ‘you don’t need to study’, it is a very awkward misleading message presented in large letters, and it is literally interpreted as a threat to students that discourages them from studying. But the audience needs to make more efforts and read between the lines to focus on the tiny written sentences. Only then, people can find out that the publicity promotes distance learning and the benefits of learning while staying home.

Figure 14

Threat in Street Billboards



4.4 Pragmatic Appeals

This research has contributed to an important theoretical finding, in that pragmatic appeals are spotted in outdoor Tunisian advertising to raise the curiosity of drivers and/or passers-by who would enquire about the ads. The researcher has labeled this type of appeal, ‘pragmatic’ as the audience has to infer the implied meaning from the billboard and decode the pragmatic context which is loaded with hints, be them graphic, textual or graphological to decode implicature. This type of appeal has proved to be triggered by utilizing concise, short and implicit ads. Overall, the latter are composed of either email addresses, a one-word (e.g. declic) or two-word messages that usually come under interrogative or exclamative sentence types. This is deliberate to incite the consumer to enquire about the implied meaning of ads and attempt to infer the implicature in messages. Apart from these linguistic choices, cool bright colors, like red blue and black, are used to further arouse the curiosity of customers as they are visually attractive colors.

Figure 15

Pragmatic Appeals in Street Billboards

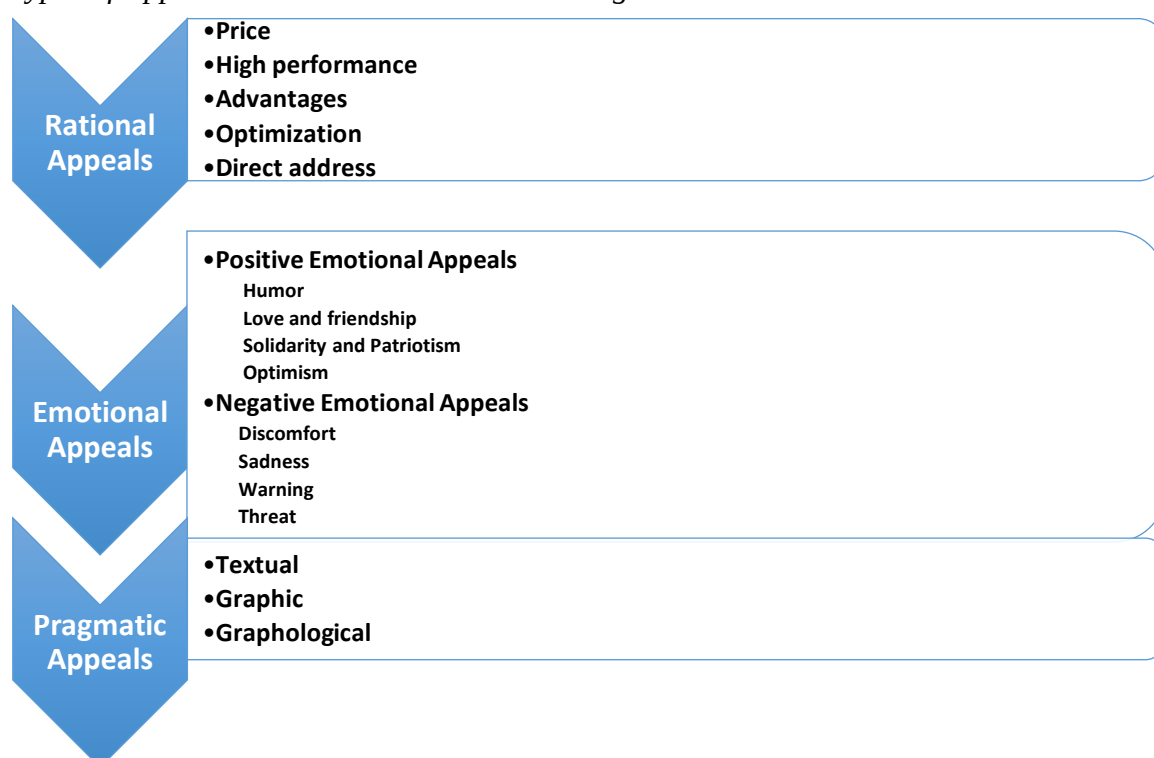




So far, the current research has explored different types of appeals in street billboard advertising in Tunisia, and figure 16 sums up all the spotted types.

Figure 16

Types of Appeals in Street Billboard Advertising in Tunisia



5. Discussion

The qualitative analysis, based on the inductive thematic approach, has contributed to setting up a theory of advertising appeals of outdoor billboard ads in Tunisia along with their matching linguistic choices by moving from particular recurring patterns to general themes. This theory can be contrasted with related existing theories in literature (see section 2). Rational and emotional appeals have already been discussed by different theorists and advertising discourse theorists (see section 2.2), but new sub-variables have been explored in this research and classified under both types of appeals. For instance, Turnbull (2022) argues that there are four sub-types of rational appeals: demonstration, price-led, comparison and science-led. The price-led sub-variable has also been detected in this research. Turnbull (2022) has also identified four other emotional appeals like guilt, fear, humor and shock, while Mogaji (2021) determined four sub-variables under the negative emotional appeal which are fear, guilt and shame.

In the current research, humor as a positive emotional appeal has also been explored besides other ‘new’ sub-types relevant to the Tunisian context. I would argue that appeal types might be country-bound and culture-dependent. They vary from one country to another as they follow some conventional social norms and cultural peculiarities proper to their countries of origins. Subsequently, negative emotional appeals constitute a crisis in the Tunisian advertising discourse as they may go against the pre-established socio-cultural norms and shock the audience.

What is more, pragmatic appeal is another type of appeal that has been theorized in this research, and has been added to emotional and rational ones to extend the advertising appeal taxonomy and enrich the advertising appeals theories regarding street billboards in particular. This is an important theoretical contribution owing to the inductive qualitative analysis since the pragmatic component constitutes a gap in the literature of advertising discourse, yet very common in Tunisia. Pragmatic appeal is neither emotional nor rational, but it is essentially intended to gain attention and arouse curiosity by employing diverse linguistic, textual, graphological and graphic choices that have been opted for by advertisers and marketers.

6. Conclusion

Research on crisis in Tunisian street billboard has showcased a wide range of appeals that range from rational, positive and negative emotional to pragmatic appeals along with different choices. For rational appeals, advertisers opted for metaphors, code-switching, collocation, superlative form, directive speech acts, Tunisian Arabic and transcription. Positive emotional appeals were realized through collocation, phonological and lexical parallelism, idioms, expressive speech acts, emojis, and cheerful and love-inspiring images. Crisis, however, has been spotted within negative emotional appeals like discomfort, warning and threat by using stigmatized disruptive graphic designs, lack of linguistic affinity, negative connotations and face threatening acts. Most significantly, pragmatic appeals have been identified, which has a great potential to be added to the pre-existing theories on street billboard advertising.

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Framing and the Use of Modality in Political Crises: A Critical Discourse Analysis of Media Narratives in the United States and the United Kingdom

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Abstract

Discourse crises in the digital time are often driven by planned linguistic choices that frame events, shape public perception, and manipulate narratives. This study examines the role of framing and modality in constructing discourse crises within the political landscapes of the United States and the United Kingdom, where political rhetoric and media narratives affect public opinion and policy decisions. Based on Critical Discourse Analysis (CDA), particularly the models of Fairclough (1995) and Van Dijk (2006), this paper analyzes political speeches, news articles, and social media posts related to high-ranking political events. The findings reveal how selective framing, evaluative language, and strategic modality affect public opinion, political engagement, and social division. This study adds to a clearer understanding of the linguistic mechanisms behind discourse crises, accentuating the critical need for critical media literacy and responsible political communication.

Keywords: Critical Discourse Analysis, framing, modality, media narratives, political crisis, linguistic manipulation

1. Introduction

Political discourse plays a fundamental role in shaping national and international narratives, particularly in times of crisis. In both the United States and the United Kingdom, political leaders and media outlets strategically use language to control public opinion, legitimize policies, and consolidate power. The framing of political events, whether through traditional media or social platforms, determines how crises are understood and acted upon by the public. This study explores how framing techniques and modality contribute to discourse crises in these two nations, where media and political rhetoric have represented a significant part in shaping national debates and ideological orientation. To probe the issue, Critical Discourse Analysis (CDA) is an instrumental approach in this research for investigating how language is used to construct reality, exert power, and affect decision-making.

This study aims to investigate the linguistic strategies employed in political discourse during political crises in the United States and the United Kingdom. Specifically, it seeks to identify framing devices, such as metaphors, agency, and evaluative language that figure the public understanding of these crises. Additionally, it explains how modality, particularly the use of certainty versus uncertainty, has an impact on political rhetoric and public decision-making. In this context, the main research questions guiding this study are:

1. How do framing techniques in media and political speeches contribute to the polarization of public opinion during political crises in the United States and the United Kingdom?
2. What role does modality play in shaping certainty, doubt, and authority in political discourse?

2. Literature Review

The literature review explores key theoretical frameworks related to this study, including framing theory, critical discourse analysis, and the concept of modality in political communication. It examines previous research on how media narratives shape public perception, particularly during political crises in the U.S. and U.K. The section also discusses the role of social media in amplifying ideological polarization and presents relevant studies that analyze the linguistic construction of authority, fear, and national identity in political discourse. This review situates the current study within the scholarly context, identifying gaps the research aims to address.

2.1 Critical Discourse Analysis

In the late eighties, Critical Discourse Analysis (CDA) came into view as a step-by-step approach in Western discourse disciplines led by Fairclough (1992) and other scholars such as Wodak (1996), Van Dijk (2006). After that, CDA has turned out to be the most prevailing and perceptible part of discourse analysis (Jaworski & Coupland, 1999). This paper presents an outline of the main mechanisms of this approach, argues significantly the focal points of CDA, and positions it in the general scene of linguistic evolutions. In this vein, this research illustrates the critical twist in language exploration whereby CDA is not restricted to any particular approach but concerns itself with a wider process of partial junction in language theory and practice. Ostensibly, CDA is a central speculative and practical device for this research. Nevertheless, it might advantage from a nearer incorporation with new disciplines.

Critical Discourse Analysis (CDA) provides a powerful framework for exposing the ideological dimensions of language in use. Its primary aim is to scrutinize “opaque as well as transparent structural relationships of dominance, discrimination, power and control as manifested in language” (Wodak, 1996, p. 204). More specifically, “[CDA] studies real, and often extended, instances of social interaction which take (partially) linguistic form. The critical approach is distinctive in its view of the relationship between language and society, and the relationship between analysis and the practices analysed” (Wodak 1999, p. 173). Discourse is socially inherent as well as socially habituated as articulated by CDA. Additionally, discourse is an obscure power device in contemporary culture. The main objective of CDA is to render what is said or written clearer and translucent. In this respect, “it is an important characteristic of the economic, social and cultural changes of late modernity that they exist as discourses as well as processes that are taking place outside discourse, and that the processes that are taking place outside discourse are substantively shaped by these discourses” (Chouliaraki & Fairclough 1999, p. 4).

To visualize and study discourse, Fairclough (1992) depicted three dimensions that represent a clear framework of analysis in discourse. The initial dimension regards discourse as a text. The concept of text here concerns itself with the linguistic description and association of real examples of discourse. The text bears the linguistic features that include options and prototypes in vocabulary such as phrasing and figures of speech, syntax such as transitivity and modality, cohesive devices, including conjunctions and schema, as well as text organization such as sequential structuring and speaker transition system. All of these have to be thoroughly examined (Fairclough, 1992). For example, the utilization of passive voice in news coverage may imply the sense of making the agent of political action vague. This focus on tangible textual characteristics is what makes CDA distinct from other theories (Fairclough, 1992).

The second dimension considers discourse-as-discursive-practice. Given that, discourse is regarded as an object that is shaped, dispersed, spread, and absorbed in its social setting (Fairclough, 1992). Discourse as discursive practice advocates for the focus on speech acts, intertextuality, coherence, language rules, cohesion, and text arrangement. The last dimension is discourse-as-social-practice, whereby the focus is on the impact of ideology and dominant power structures in discourse which implies hegemonic dynamics as articulated on “Gramsci's concept of hegemony which consists in the capacity of a fundamental class to articulate to its discourse the ideological elements characteristic of a given social formation” (Mouffe, 2014, p. 198). The notion of hegemony involves securing power by building coalitions, and integrating classes through voluntary agreement. Therefore, “the articulation and rearticulation of orders of discourse is correspondingly one stake in hegemonic struggle” (Fairclough, 1992, p. 93).

Critical Discourse Analysis (CDA) serves as a multidisciplinary tool for examining how language reflects and reinforces social power structures across various domains. According to Van Dijk (1988) “CDA is used to analyze critical discourses, including politics, race, gender, social class, hegemony, etc.” Van Dijk (2006) viewed a text as composed of numerous interconnected structures or levels, each reinforcing the others. Van Dijk (2006) categorized these structures into three levels. The first is the *macrostructure*, which represents the overall meaning of a text, typically conveyed through the central theme or topic of the text. The second is the *superstructure*, which refers to the organization of the text, focusing on how its components are arranged and integrated into a coherent discourse. The third is the *microstructure*, which pertains to the meaning at a smaller scale, observed in elements like individual words, sentences, propositions, clauses, paraphrases, or images within the text. Critical discourse analysis can make a meaningful and definitive contribution to social or political critique only if it effectively demonstrates the role of language, discourse, and expression in establishing and maintaining dominance and inequality (Van Dijk, 2006). As per Van Dijk (2012) “the notion of 'ideology' is widely being used in the social sciences, in politics, and in the mass media.” (p.5).

Explaining the role of discourse, Van Dijk (2013) argued that language use and discourse, which are significantly shaped by ideologies, play an essential role in how we acquire, learn, or alter ideologies. Much of the discourse we engage in, particularly as members of various groups, reflects ideologically driven views. People primarily learn ideological beliefs by listening to and reading what other group members express, starting with our parents and peers (Van Dijk, 2013). As individuals grow, they encounter ideologies through sources like television, textbooks, advertisements, newspapers, novels, and casual conversations with friends and colleagues, among many other forms of communication. (Van Dijk, 2013). Certain types of discourse, such as catechism, party rallies, indoctrination, and political propaganda, are explicitly designed to 'teach' ideologies to both existing group members and newcomers (Van Dijk, 2013). In this vein, this research aims at investigating how certain linguistic processes may shape public perceptions and maintain hidden ideologies.

2.2 Discourse and Media Framing

Van Dijk (1997) claimed that studies in discourse are pertaining to multiple distinct academic disciplines or fields of study entrenched in three primary dimensions: language use, cognition and communication. Likewise, according to Phillips and Hardy (2002), discourse is an interrelated collection of “texts and practices of their production, dissemination and reception” (p. 3). Discourse analysis in that case identifies and looks at the correlation between discourse and the social environment. For instance, analyzing the discourse of immigration as

it is duplicated by public newspapers in the Windrush scandal reporting may facilitate the understanding of the way some political prejudices and suppositions are stressed in the print based media. The analysis of immigration akin to discourse helps individuals look past the apparent and critique the purpose concealed through certain figurative language, such as metaphors employed by newspapers or political leaders.

Discourse analysis is an interdisciplinary approach that affords instruments for checking linguistic structures and ordinary narratives in a manuscript or verbal communication. To highlight the options of the migration discourse analysis, Van Dijk (2018) presented a variety of genres in discourse related to the field of migration, like mass communication discourse, politic discourse, legal discourse, public association discourse, etc. According to Goffman (1974), Frames are regarded as the analysis of a structured situation that is grounded on the assumption of administration that rules social actions and personal interests (Goffman, 1974). In the same way, Entman (1993) argued that framing involves selecting specific aspects of reality and emphasizing their significance within a text to shape how a problem is defined, interpreted, morally assessed, or addressed through a suggested course of action.

Discussions of political issues often reflect underlying ideological positions and power structures embedded in language and discourse. The way political actors frame topics manipulate public perceptions, policy decisions, and social attitudes (Entman, 1993). For example, in the UK, Brexit discourse was highly polarized, with pro-Brexit and anti-Brexit rhetoric using distinct framing strategies. Research by Koller et al. (2019) demonstrates how Brexit supporters framed the issue as "taking back control," inducing notions of sovereignty and empowerment, at the same time as opponents framed it as an economic catastrophe. Similarly, in the United States, political leaders have used language strategically to shape the public perceptions of domestic and international crises, frequently employing fear appeals and nationalistic rhetoric (Lakoff, 2004).

Media narratives contribute significantly to discourse crises. Fairclough (1995) argued that media representations strengthen dominant ideologies by constructing reality in ways that align with political or corporate interests. For example, *Fox News* recurrently framed the 2020 U.S. presidential election as "fraudulent" and "stolen," (Dominion Voting Systems v. *Fox News Network*, 2023; *AP News*, 2023) underpinning Trump's claims of election interference. Meanwhile, *The New York Times* framed Trump's rhetoric as a "threat to democracy," (Vanity Fair, 2020; *The New York Times*, 2020) portraying him as an instigator of political instability. Such contrasting coverage demonstrates the significant role of language in shaping public discourse. Van Dijk (2006) deduced that elite discourse shapes public cognition, particularly through strategic framing and the use of presuppositions.

Another example is the framing of the COVID-19 pandemic in both U.S. and UK media that evidently shows up these linguistic mechanisms. Johnson's statements, such as "We are taking back control of our response," (Johnson, 2021) suggest agency and responsibility, whereas Trump's phrase "The Chinese virus" (Trump, 2020) racialized the crisis, underlining xenophobic undertones. These examples draw attention to how linguistic strategies contribute to political divisions and social instability.

2.3 Modality in Discourse

Modality, as discussed by Halliday (1994), plays a critical role in political discourse, influencing how certainty, authority, and obligation are conveyed. Trump's frequent use of

high-modality expressions, such as “We will win this battle,” (Trump, 2020) conveys certainty and assertiveness, strongly expressing his authority. In contrast, Biden’s more cautious modality, as seen in statements like “We must work together to rebuild,” (Biden, 2021) gives emphasis to collective effort and uncertainty about the future.

The term *modality* has been extensively studied by linguists and philosophers (Cameron, 2007; Endley, 2010; Halliday, 2002; Palmer, 2001; Schmauss & Kilian, 2023; Xu et al., 2022), who have proposed various classifications, ranging from the interpretation of individual modal phrases to the contextual factors shaping their meaning in discourse. In this respect, Endley (2010) argued that modality encapsulates the stance a speaker adopts on an issue, with this stance being evident in the way they articulate their thoughts. In a similar vein, Cameron (2007) viewed modality as a means by which writers and speakers claim authority over knowledge, as it enables them to signal the degree of certainty they attach to various claims like opinions, firm assertions, or mere speculations. Additionally, several scholars (Fowler, 1985; Garcia, 2000; Lyons, 1983; Palmer, 2001) approached modality from a semantic angle, arguing that it can be divided into two distinct types: epistemic and deontic. Unlike the deontic modality which covers obligation, consent, and preference, the epistemic modality relates to semantic meanings such as requirement, likelihood, and forecast.

According to Lyons (1983), modality serves a variety of grammatical and semantic roles, such as compulsion, need and certainty. When modality is applied outwardly in discourse, these functions are generally viewed as routine. However, in other contexts, speakers deliberately employ modalities to achieve additional pragmatic objectives. Discourse analysts see this intentional use as ideological, meaning that modalities are strategically utilized to express specific pragmatic functions rather than just their inherent semantic meanings.

Garcia (2000) argued that modality carries two distinct meanings. One is a systematic meaning rooted in its standard semantic functions, and the other is a pragmatic meaning that reflects the interplay between a modal's inherent semantic role and the interpersonal function it assumes in interaction. This interrelationship is central in interactions, as it enables the simultaneous delivery of both explicit semantic content and the intended pragmatic function. Furthermore, Garcia (2000) contended that the systematic meaning attributed to modality in discourse not only embodies the general sense derived from its diverse applications but also incorporates the contextual meanings that modal expressions acquire from various communicative settings.

Halliday (2002) claimed that modality goes beyond the use of explicit modal auxiliaries (e.g., may, can, could, will, would, should, must); rather, it encompasses the speaker’s or writer’s stance and level of self-belief in the argument presented. Halliday (2022) located modality primarily within the interpersonal function of language; a realm that operates independently from other components like the ideational aspect that governs transitivity. Fowler (1985) similarly observed that modality can be expressed not only through modal verbs but also via adjectives, sentence adverbs, and specific nominalizations. In spite of variations in definitions, there is general consensus among linguists regarding key categories of modality. For example, Jespersen (1924) generally divided modality into two classes: those involving an element of volition and those that are devoid of it.

Focusing on categories similar to Jespersen’s (1924), Palmer (2001) identified deontic and epistemic modalities. However, he also reorganized them into a two-part system: propositional modality, which includes both epistemic and evidential aspects, and event modality, which

encompasses both deontic and dynamic elements. In this framework, propositional modality reflects the speaker's judgment regarding the truth or factual status of a proposition, whereas event modality concerns potential events that have not yet occurred.

Ultimately, the strategic use of modality in discourse crises plays a vital role in framing narratives and shaping public perception by guiding how audiences interpret and respond to multifarious events.

3. Methodology

3.1 Data Collection

Data collection includes a purposive sample of 8 political speeches delivered by Donald Trump (2017, 2019, 2021), Joe Biden (2020, 2022), Boris Johnson (2019, 2020), and Theresa May (2018), selected for their rhetorical significance in moments of political crisis between 2016 and 2022 and for their relevance to major political crises. In addition, the data collection includes news articles from *The Guardian* (Asthana & Mason, 2017), *The New York Times* (Peters & Robertson, 2023), *BBC News* (Walters et al., 2020), and *Fox News* (Barr et al., 2023) to examine how framing techniques and modality are strategically used during political crises. The analysis employed in this study integrates both thematic and content analysis approaches, whereby thematic analysis was used to identify and interpret recurring discourse patterns, ideological themes, and framing strategies within political speeches and media texts, such as appeals to nationalism, democratic values, and fear, whereas content analysis provided a quantitative dimension through the systematic coding and categorization of modal verbs, headline structures, and social media statistics, thus allowing for a comprehensive examination of how language and frequency-based patterns interact to construct meaning and reinforce political polarization. The main focus thereby is on framing through the use of metaphors, agency, and evaluative language, as well as modality through the use of modal verbs such as must, may, and will to express certainty or obligation.

The data for this analysis were collected through a purposive sampling of media texts from leading newspapers and online news platforms during turbulent periods of political crisis in both countries. The selection criteria assigns primacy of place to sources that have significant impact on public opinion and that represent a range of ideological stances. Articles, opinion pieces, and editorials were analytically gathered to grasp a diverse display of discursive practices. Each text was meticulously examined for its employment of rhetorical devices, modal expressions, and framing strategies that indicate particular attitudes or stances towards the crisis events. Both qualitative and quantitative procedures were used to identify recurring themes and patterns in the discourse, guaranteeing that the analysis was both comprehensive and replicable.

3.2 Research Methods

This study employs CDA to inspect linguistic manipulation in political speeches, news articles, and social media posts in the United States and the United Kingdom. CDA facilitates the exploration of the intricate ways in which language constructs and conveys ideological positions, power hierarchy, and social relations. The focus here is on the interchange between the linguistic choices and the general socio-political contexts. CDA further makes possible the understanding of how media texts not only report events but also actively outline public perceptions and political realities.

3.3 Data Analysis

The analytical process extended in several stages. Initially, a close reading of the texts allowed for the identification of dominant frames and the discursive markers that typifies them. Subsequently, these markers were hinted and analyzed using both manual techniques and computer-assisted tools to reveal patterns of language use that go in accordance with established theories of framing and ideology. This profound analysis paid special attention to how language is deployed to construct crisis narratives and activate ideological positions that influence public discourse and policy debates. By the means of integrating these methods, the study aims to provide a detailed account of the mechanisms whereby media discourse not only reflects but also shapes the political scene during times of crisis.

4. Findings and Discussion

4.1 Findings

In both the United States and the United Kingdom, framing devices are used to control narratives. For example, Boris Johnson's speeches (Johnson, January 31, 2020) on Brexit frequently framed the UK as a "caged nation" seeking freedom, creating an image of Britain breaking free from the EU control. Similarly, Trump's speeches (Trump, January 10, 2019) on immigration framed migrants as a "threat" to national security, which generates a sense of urgency and fear among the public.

Modality is used to express certainty or create ambiguity. In UK political discourse, Johnson's use of statements (Johnson, January 31, 2020) such as "We must regain control of our borders" accentuates authority and inescapability. In U.S. media coverage, phrases like "This may lead to widespread instability" (CNN, 2020) allow for multiple interpretations that affect public perceptions without committing to a definitive stance. Trump's speeches (Trump, January 10, 2019) consistently include high-modality verbs to convey certainty and strength, while Joe Biden's rhetoric employed lower-modality expressions to promote unity and shared responsibility, as in his inauguration address, where he declared, "Bringing America together. Uniting our people. And uniting our nation" (Biden, January 20, 2021). The media coverage of the 2020 U.S. election further demonstrates the role of language in crisis discourse. Conservative media outlets such as *Fox News* and *Breitbart* frequently used expressions like "rigged system" and "fraudulent ballots" (November, 2020), reinforcing employed terms like "peaceful transition of power" and "upholding democracy" to frame Trump's claims of election fraud. In contrast, liberal media such as *CNN* (December, 2020) and *MSNBC* (December, 2020) Biden's presidency (Biden, December, 2020) as a restoration of stability. These contrasting linguistic strategies intensified public division and contributed to post-election tensions. These linguistic strategies step up public division and contribute to post-election tensions.

4.1.1 Thematic Framing in Media Narratives

Thematic framing concerns itself with insisting on specific aspects of an issue at the same time as excluding others. This section presents statistical data regarding the framing of critical political events in both the U.S. and the U.K.

In British tabloids like *The Sun* (*The Sun*, June 2016), the framing of Brexit (Brexit refers to the United Kingdom's withdrawal from the European Union, officially completed on January 31, 2020, following the 2016 referendum in which 52% voted to leave the EU. The term is a

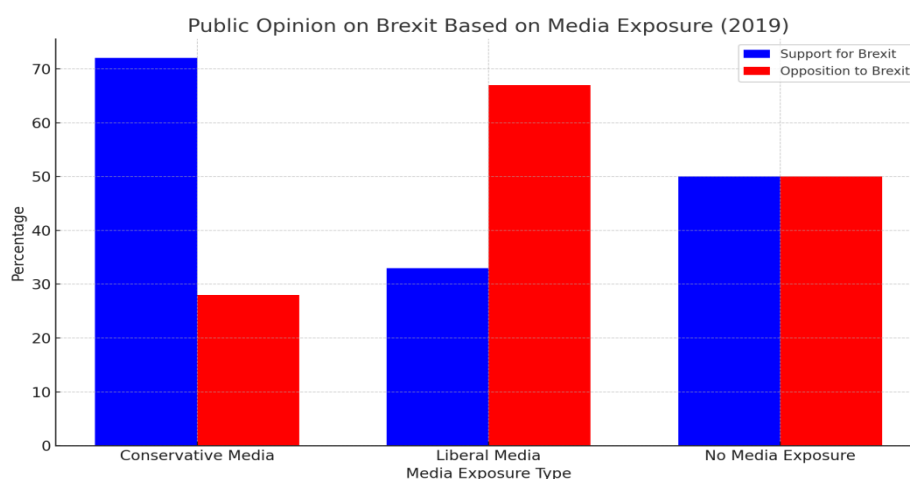
blend of “Britain” and “exit.”) is predominantly centered around sovereignty (45% of coverage), and this stresses national control over borders. On the other hand, *The Guardian* (*The Guardian*, June 2016), while still critical, focused more on the economic and social consequences (38%), thereby exposing the negative impacts of Brexit. American media, particularly *The New York Times* (*The New York Times*, June 2016) and *Washington Post* (*The Washington Post*, June 2016), focused on the international implications and economic disparities, which exemplifies how different media outlets frame the same event from divergent angles based on their ideological stance as shown in Table 1.

Table 1
Framing of Brexit in British and American Media

Media Outlet	Framing Theme	Percentage of Coverage Focused on Theme	Example Headline
<i>The Sun</i>	Sovereignty and National Control	45%	"Taking Back Control: Why Brexit is Our Sovereign Right"
<i>The Guardian</i>	Economic and Social Costs	38%	"Brexit's Economic Fallout: The Looming Crisis"
<i>The New York Times</i>	International Relations	42%	"How Brexit Undermines European Unity"
<i>Washington Post</i>	Economic Disparities	40%	"The Cost of Brexit: Economic Uncertainty and Social Impact"

Additionally, Figure 1 below represents the public opinion on Brexit based on media exposure from Table 1. This clearly shows the differences in support of and opposition to Brexit depending on the type of media consumed, with conservative media leading to higher support for Brexit, liberal media leading to higher opposition, and those with no media exposure having a more balanced view.

Figure 1
The Influence of Media Exposure on Public Opinion Regarding Brexit (2019)



4.1.2 Lexical Choices and Modality in Political Discourse

The use of modality (how likely or necessary something is framed to be) directly shapes public perception by adding levels of certainty or possibility to the discourse. Modality plays an important role in figuring the way political discourse is interpreted particularly during times of crisis. The analysis of real-world speeches and statements from politicians helps give a clear idea about how modal verbs (such as *must*, *will*, *should*, *may*, and *could*) construct certainty, obligation, or possibility. This section examines how modality has been strategically used in major political events in the United States and the United Kingdom, and this can impact public perception and policy making.

In the U.S. coverage of Trump impeachment (January, 2020), the use of modality varied between media outlets. For instance, *Fox News* used the modal verb ‘must’, signaling urgency and necessity, which gives a sense of moral imperative among its audience. In contrast, *CNN* used ‘will’, conveying a stronger sense of certainty regarding the impeachment's outcome. The *New York Times* employed ‘could’, for the purpose of introducing an element of possibility, which may suggest a more cautious or less definitive view. These choices delicately affect the reader’s perception of inevitability or uncertainty about the impeachment. Such choices are illustrated in Table 2.

Table 2

Modality Usage in the U.S. Impeachment Coverage (2020)

Media Outlet	Modal Verb (Certainty)	Headline Example	Sentiment
<i>Fox News</i>	"Must" (Necessity)	"Trump Must Fight the Impeachment Hoax"	Strong Supportive
<i>CNN</i>	"Will" (Certainty)	"Trump's Actions Will Lead to Impeachment"	Critical
<i>The New York Times</i>	"Could" (Possibility)	"Trump Could Be Impeached: The Legal Path Forward"	Neutral/Cautionary

One of the most striking examples of modality that has an impact on political action occurred in former President Donald Trump’s speech before the January 6th Capitol riot. Particularly the excerpt from Trump's speech (January 6, 2021) "We must stop the steal. We will never give up, we will never concede." In this statement, the use of “must” conveys strong obligation, signaling a non-negotiable action that his supporters should take. “Will” expresses certainty, supporting the idea that he and his supporters will not accept defeat. The phrase “we will never give up” indicate a firm and irreversible stance. This type of high-certainty modality creates a sense of urgency and unavoidability, triggering the emotional mobilization of his audience. The framing of the election as something that “must” be stopped gives the impression of a necessary intervention, legitimizing resistance and justifying action.

Another clear instance is the Brexit negotiations where there was a variety of modal constructions used by politicians to push their positions. The Theresa May’s speech (2018) on Brexit "A bad deal would be worse than no deal at all, but we must work to ensure a deal that protects British interests." further illustrates how modality is used to shape public opinion. Here, the modal verb ‘would’ introduces a hypothetical scenario, allowing May to warn of negative consequences without asserting them as certain. ‘Must’ expresses necessity, indicating that securing a Brexit deal is an obligation. The contrast between “would” (possibility) and must

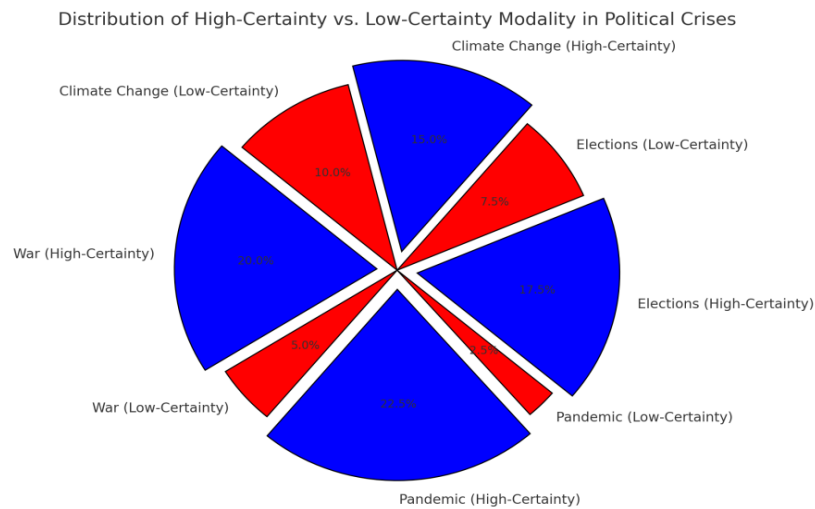
(necessity) helps frame her position as both cautious and determined. Table 3 and Figure 2 visually represent how modality is used in political discourse to shape public perceptions and influence policy responses.

Table 3
Modal Verbs and Their Function in Political Speeches

Modal Verb	Function	Example from Political Speech	Effect on Audience
Must	Strong obligation/necessity	"We must protect our democracy at all costs." - Biden (2022)	Creates urgency and necessity
Will	Certainty/determination	"We will deliver Brexit on time." - Boris Johnson (2019)	Signals inevitability
Should	Advice/recommendation	"We should consider all options before military action." - Obama (2014)	Suggests deliberation
Could	Possibility/uncertainty	"This could be the most dangerous moment in history." - Trump (2017)	Creates ambiguity and caution
Might	Hypothetical speculation	"The virus might disappear on its own." - Trump (2020)	Downplays urgency
Shall	Formal commitment or obligation	"The UK shall remain a steadfast ally to NATO." - Theresa May (2018)	Emphasizes duty
May	Permission or possibility	"This may be a turning point in global politics." - Macron (2021)	Allows room for flexibility

Ostensibly high-certainty modals (must, will, shall) are commonly used in crisis situations (e.g., war, pandemic), whereas low-certainty modals (could, might, may) are used in uncertain scenarios to hedge responsibility. Figure 2 more illustrates this.

Figure 2
Frequency of Modality Types in Political Crises



4.1.3 Social Media Amplification and Polarization

Social media platforms amplify media frames and further divide public opinion. This section shows interest on how social media users interact with political content and the resulting impact on polarization.

Using descriptive statistics and SPSS analysis the data summarized in Table 4 below shows a notable variation across social media platforms in both the percentage of political content shared and their associated polarization impact. Twitter recorded the highest percentage of political content sharing at 79%, accompanied by a high polarization index of 9.2 on a 10-point scale, indicating its strong role in amplifying ideological divides. Facebook followed with 68% of political content shared and a polarization index of 8.5. Instagram, while still significant, showed a lower engagement with political content at 55% and a correspondingly lower polarization index of 6.3. These figures bring to light the differential impact of each platform, with Twitter and Facebook emerging as the most prominent in fostering political echo chambers and intensifying polarization as shown in Table 4.

Table 4
Polarization and Political Engagement on Social Media (2020 U.S. Election)

Social Media Platform	Percentage of Political Content Shared	Polarization Index (1-10)
Facebook	68%	8.5
Twitter	79%	9.2
Instagram	55%	7.3

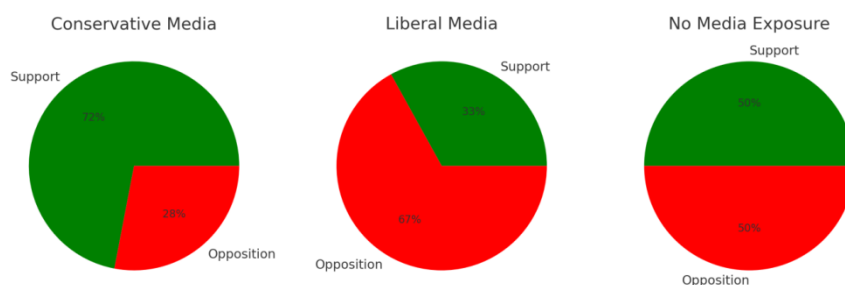
Table 4 illustrates the extent to which political content is shared on social media platforms. Twitter has the highest percentage of political content (79%) and the highest polarization index (9.2), indicating that political discussions on Twitter are more divisive compared to Facebook or Instagram. The viral nature of Twitter means that political content is often bigger and reshaped in ways that strengthen existing political divisions, creating a heightened sense of polarization.

4.1.4 Statistical Evidence of Media Influence on Public Perception

The influence of media framing on public opinion is often measurable through public surveys and studies. The following figure presents data on how media exposure affects opinions about political crises. The data in Figure 3 was drawn from previously published studies and polls that examined the relationship between media exposure and public opinion during the Brexit crisis. A study by Gorrell et al. (February 18, 2019) found a strong correlation between political alignment of social media content and user stance on Brexit. Similarly, a Pew Research Center report (October 28, 2019), showed that individuals who consumed conservative media were extensively more likely to support Brexit (72%), while those who followed liberal media were largely opposed to it (67%). These findings illustrate how media framing influenced public opinion and reinforced ideological divisions during the referendum.

Figure 3

Public Opinion on Brexit Based on Media Exposure

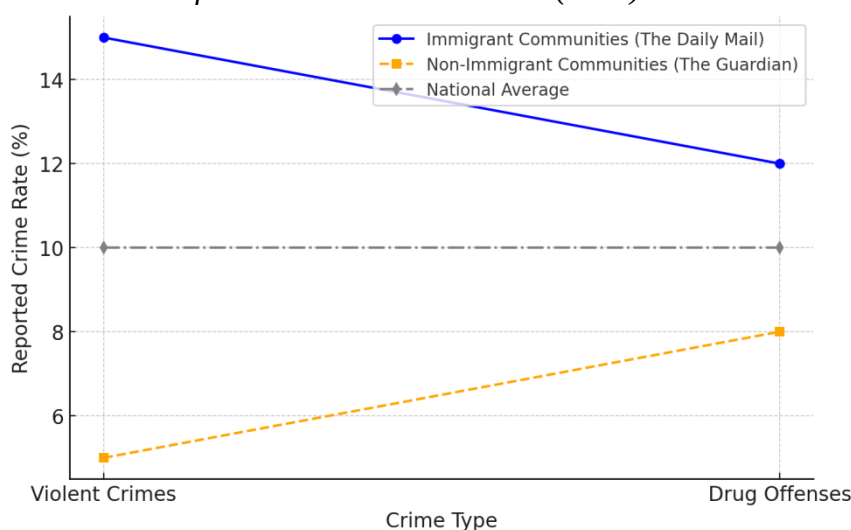


The data show a stark divide in public opinion on Brexit based on media exposure. Those who were exposed primarily to conservative media outlets were more likely to support Brexit (72%), whereas those who consumed liberal media content were overwhelmingly opposed to it (67%). This suggests that media framing plays a significant role in shaping public opinion, drawing attention to the power of media in reinforcing ideological divides.

4.1.5 The Role of Statistical Reporting in Shaping Narratives

The way statistics are presented in the media can have a significant impact on public opinion. The selective reporting of data, particularly in the context of political crises, shapes how issues are perceived. The data in Figure 4 is drawn from secondary content analysis of media portrayals of crime statistics during political debates on immigration. Specifically, the chart reflects reported crime rates as presented by two contrasting media outlets: *The Daily Mail* (*The Daily Mail*, March 2021) which emphasized higher crime rates in immigrant communities; in contrary *The Guardian* (*The Guardian*, March 2021) underlined lower crime rates in non-immigrant communities. These representations were compared to the actual national average (10%) sourced from the UK Office for National Statistics. This visual comparison illustrates how selective statistical reporting can construct divergent narratives, influencing public perception depending on the outlet's editorial stance.

Figure 4
Selective Use of Crime Statistics in the UK (2021)



Evidently, the data from *The Daily Mail* (*The Daily Mail*, March 2021) suggests that crime rates in immigrant communities are disproportionately reported compared to non-immigrant communities. By focusing on higher crime rates in immigrant areas (15% violent crimes vs. 5% in non-immigrant areas), the outlet frames immigrants as a threat to national security. In contrast, *The Guardian* (*The Guardian*, March 2021) provides a more objective perspective, reporting that crime rates in immigrant communities are not significantly higher than the national average, therefore, offering more understanding of the issue. This selective reporting can have an impact on the public's perceptions of immigrants, which further contributes to highly debated issues.

4.2. Discussion

The relationship between media framing and public perception is central in shaping how political crises are understood. Modality, in particular, helps construct the certainty or uncertainty around critical political events, thereby impacting public opinion. This research analyzes the impact of media framing and modality on the public's view of political crises in the United States and the United Kingdom, integrating statistical evidence, figures, and real-world social media examples.

This study has demonstrated the profound impact of media framing and modality on public perception during political crises. Through thematic framing, lexical choices, and selective use of statistics, the media can shape public opinion in ways that extends sharp ideological split. Noticeably, social media platforms further amplify these frames, and intensify divisions. The statistical evidence presented here shows how different media outlets influence public attitudes towards important political episodes, and this demonstrates the power of language and media in molding political structures. By using figures, tables, and statistical evidence in this way, the analysis in this line of study becomes more vigorous, giving both qualitative and quantitative perspectives into how media framing and modality shape public discourse and contribute to ideological fragmentation.

This study has shown also the weighty influence of media framing and modality on communal awareness throughout political and economic crises. The findings divulge that media framing operates not only through overt thematic choices but also via subtle lexical selections

and the strategic presentation or omission of statistical data, all of which contribute to constructing particular realities for the audience. Such framing strengthens and worsens existing ideological divides, confirming the critical role of language as a site of power and contestation in political communication.

The analysis of different media outlets reveals that framing is rarely neutral; rather, it aligns with ideological predispositions, affecting the cognitive and emotional responses of their audiences. For example, the selective use of statistics can lend an impression of objectivity and credibility to ideologically motivated narratives, consequently enhancing persuasion and solidifying partisan perspectives. This finding triangulates with previous research indicating that statistical information, when put within a frame congruent to audience beliefs, is more likely to be accepted and retained.

Furthermore, the study accentuates the fundamental role of modality in shaping message credibility and audience engagement. The integration of figures, tables, and quantitative data not only bolsters the perceived legitimacy of the framed content but also facilitates cognitive processing by providing concrete evidence. However, the modality of presentation, whether statistics are emphasized, downplayed, or contextualized, can significantly have an effect on how audiences interpret the basic political events, hence mediating the general framing effects.

Importantly, the amplification effects of social media platforms represent a critical dimension in contemporary political communication ecosystems. Social media's algorithm-driven dissemination intensifies exposure to ideologically consistent frames, fostering echo chambers and filter bubbles. This process aggravates political polarization by limiting cross-cutting discourse and reinforcing confirmation bias. The findings here demonstrate that such digital modalities not only extend the reach of traditional media frames but also introduce new layers of interaction, where users themselves participate in framing through sharing, commenting, and selective amplification.

The statistical evidence presented confirms the differential influence of media outlets in shaping public attitudes during political crises, which echoes established theories on agenda-setting and framing effects. These influences add to molding political structures by shaping collective memory, public discourse, and, eventually, political behavior. As political crises regularly involve high uncertainty and emotional salience, the media's framing role becomes even more central in guiding the public interpretation and legitimizing specific political actors or policies.

5. Conclusion and Recommendations

This study reveals how framing and modality shape political discourse crises in the United States and the United Kingdom. Relying on CDA, it becomes evident that language is not neutral but a tool for power and persuasion. The research calls attention to the need for critical media literacy to educate the public on framing tactics in order to promote knowledgeable decision-making, responsible journalism, unbiased reporting and reduced ideological unfairness in crisis coverage. There should be a policy awareness so that policymakers are mindful of how their language influences public perception and stability. It is worth noting here that understanding linguistic manipulation in political crises, societies can better probe discourse crises in the digital age.

Moreover, the interchange between qualitative framing and quantitative data shows up the value of mixed-methods approaches in media studies. When integrating qualitative thematic

analysis with quantitative statistical validation, this study presents a more comprehensive understanding of how media shape public discourse. Such methodological triangulation better the quality of the findings and encourages future research to adopt interdisciplinary perspectives to unpack the complex aspects of media influence.

Ostensibly, this study furnishes the upward body of scholarship on media framing and modality by illustrating how linguistic choices and multimodal elements collaboratively shape political perception, especially in times of crisis. Set the accelerating role of digital platforms in political communication, ongoing research should further explore the evolving modalities of framing, including visual rhetoric, algorithmic mediation, and user-generated content to entirely apprehend their implications for democratic deliberation and social cohesion.

Limitations of this study include its focus on only two countries, which may limit the generalizability of the findings to other political and cultural contexts. Furthermore, the analysis primarily relies on qualitative methods, which, even as rich in depth, may benefit from complementary quantitative data to measure the impact of framing strategies on public opinion.

Future research could expand the scope to include more diverse geopolitical settings and explore the role of emerging digital platforms and social media in shaping political discourse crises. Further studies might also investigate the long-term effects of framing on public trust and democratic participation, as well as develop intervention strategies to mitigate the adverse effects of biased media framing.

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Crisis in discourse: An analysis of Piers Morgan and Bassem Youssef's debate over the Israeli-Palestinian "conflict" using Goffman's Framing Theory

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Abstract

Whenever there is a debate over a matter of interest where two competing ideas are the most dominant in a discourse, misunderstandings and conversational clashes are likely to happen. Typically, people, engaging in controversial discussions, choose to side with one of the opposing parties based on what perfectly aligns with their part of the truth. Only when people deviate from the initial topic and try to attack the other speaker, instead of concentrating on supporting their viewpoints, a crisis in discourse emerges. A very famous example that portrays the inability to maintain a fruitful conversation is the interview between Piers Morganⁱ and Bassem Youssefⁱⁱ about the Israeli-Palestinian war of October, 7, 2023. The crisis in their discourse is hypothetically attributed to the framing techniques that were adopted in portraying the story. This study aims to explore the tension between these speakers using Goffman's framing theory. To this effect, both qualitative and quantitative research methods are applied. The selected corpus consists of approximately 4000 words of a conversation that lasted for 33 minutes. The analysis focused on applying different types of frames that are developed in Linström and Marais, 2012. The results showed how Morgan victimized Israel using "the human impact frame" showing how the war was inevitable. "The powerlessness frame" was used to support Israel's right to defend itself. "The moral values frame" was used to silence Youssef and distract the audience. And finally, "the conflict frame" was used to show that Israel's actions were just reactions and not a declaration of war. The quantitative analysis aimed to show the frequency of the mentioned frames using SPSS. The aim of this study is to argue for the need to understand the hidden ideologies that media tries to impose through frames.

Keywords: framing theory, crisis in discourse, Morgan and Youssef's interview, Israeli-Palestinian conflict

1. Introduction

The explicit exhortation to engage in public conversations, a principle that is universally referred to as the right to freedom of speech and/or expression, has created an endless number of discussions, fostering the circulation of diverging opinions. The exposure to a variety of dissenting ideas creates moments of tension between interlocutors, especially when addressing matters of interest (Chao et al., 2024). Notwithstanding the disputes that may result from the abundance of conflicting views, free speech advocates insist on the efficiency of disagreements in maintaining critical thinking and boosting human knowledge, arguing that disagreements are even more efficient than agreements (Sweetman, 2021).

However, argumentations on contentious topics do not necessarily generate favourable results. In some cases, controversial issues can result in "deep disagreement", a theory that suggests that conflicts are not only hard to resolve but also immune to rationale (Fogelin, 1985,

as cited in Manhire & Kronqvist, 2025, p. 2). In tandem with this claim, it is argued that some disagreements seek to surpass the scope of freedom of speech and follow a confined binary classification of rightness and wrongness, which facilitates the imposition of stereotypes and clichés.

Being surrounded by various statements of thought that resist questioning and verification, humans' quest to fulfill free speech's fundamentals has become increasingly challenging given that discourse is not exclusively moderated by speakers themselves. In the fast changing world, social interactions are regulated by media and social media platforms, which have emerged as the main tool for information and communication. Trending topics, in particular, receive salient attention within media and social media settings as debatable matters offer the opportunity for media representatives to direct the common sense into a specific agenda (Djerf-Pierre et al., 2024). Social media platforms thrive on social misunderstandings and chaotic situations. For this reason, any disagreement represents a material for attracting viewers and fueling discussions.

Among the most famous controversies that humanity focuses on today is the case of Palestine in relation to Israel. Though this bone of contention is not new, it remains confusing and far from being solved. This can be sensed through the number of interviews that are being conducted in an attempt to explore the plight (Altahmazi & Abid, 2025; Gabsi, 2024). The confrontation between Palestine and Israel has resulted in an acrimonious discursive crisis, which is generated from one's standing concerning the matter. The gap between the supporters of Israel and the defenders of Palestine is accurately exemplified in the recent debate between Piers Morgan and Bassem Youssef with each speaker representing the voice of each of the conflicting parties. This interview is selected as a case study aiming to detect the framing techniques that interlocutors employ in a discourse and which yield conversational failures.

In this paper, it is argued that the complexity of the vindication of one's position in supporting either Palestine or Israel stands as an obstacle towards realizing effective communication. Additionally, although media discourse revolves around two major principles which are ensuring that all views are heard and that speakers freely express their views, in heated situations, media presenters tend to be far from maintaining objectivity as contradiction and double standards seem unavoidable in their interviews, and thus they hinder public debates rather than handle them. The problem that this research seeks to highlight is the complexity of tolerating crucial opinions that center around unresolved troubles which creates a discursive barrier between interlocutors.

This research aims to fulfill three main objectives, which are illustrated as follows:

- 1) Pinpointing the discursive failure in the interview that featured Piers Morgan and Bassem Youssef about the Israeli-Palestinian conflict.
- 2) Underscoring the contradiction between the global insistence on allowing a space for nuanced conversations and the failure to achieve such a goal.
- 3) Investigating the framing techniques used by media to pass biased ideologies.

To satisfy the study's objectives, three main questions need to be answered:

- 1) What framing techniques do the interlocutors use to reach their goal of polarizing the public opinion?
- 2) What are the possible effects of their linguistic devices on the audience?
- 3) Is objectivity what really characterizes media discourse, or is it just a heading that is used to hide bias in the media coverage of the Israeli-Palestinian 'conflict'?

This research aims to reach its objectives by answering the questions it raises. Accordingly, it is required to delve into the divisiveness in the world view on the Israeli- Palestinian conflict to explore the discourse crisis between interlocutors as a first step. The next part is assigned to elucidating the media's power in controlling discursive crises in general with special focus on the matter under investigation. The analysis is illuminated by a theoretical framework underpinning the framing techniques that underlie the language used in media discourse.

2. Literature Review

2.1 The Israeli-Palestinian “Conflict” as a Discursive Crisis

The attack of Hamas on Israel on 7 October 2023 represents a turning point in the Israeli-Palestinian “conflict”, capturing attention worldwide and causing a chasm between Israel supporters and Palestine defenders (Houlette, 2024). The longstanding war between Israel and Palestine has always been on the spotlight, yet it is often dealt with as an emerging phenomenon that is contingent upon the present moment, as it receives periodic updates. The nature of the war as well as the adopted method in representing it further the communicative gap between the outsiders involved in the matter. Since the Israeli-Palestinian case was never exclusively the concern of the two opposing parties, the recent incident caused the world to firmly commit itself to inquiring about the matter in an unprecedented manner (Altahmazi & Abid, 2025). McDoom (2024) argues that the confrontation between Hamas and Israel differs from any other global feud as it yields a public response, ranging from scholarly settings to lay audience. The complexity of approaching the matter lies in the core of one's standpoint towards both entities' right to exist. Burawoy (2025) believes that neutrality is not possibly achievable because the amount of violence that the world is witnessing urges for a clear position. However, taking a side does not count as freedom of speech but rather as a declaration of accountability that has consequences.

The controversy resides at assigning a “victimhood” status to either of the combatants. Pinpointing the real victim out of the war story necessitates recognizing that this task is challenging. In an era where truth is at high risk of manipulation, differentiating between the victim and the victimizer demands “coordinated effort and felicitous conditions” (Altahmazi & Abid, 2025, p.208). In any context of war, adversaries never admit that their actions are subject to criticism and questioning. On the contrary, they legitimize their way of responding to the potential threat that they believe they are experiencing. In the case of the Israeli-Palestinian conflict, outrage broke when the horrors of war inflicted civilians who are supposedly innocent citizens whose safety is a primacy (Gabsi, 2024). According to Liu (2024), in war arena, the distinction between combatant and non-combatant is made a priority. Any infringement to this principle is not only considered as a clear transgression of human rights but also a humanitarian crisis par excellence.

Comments on this humanitarian crisis have triggered a chaotic environment where random terminologies are selected to describe the tragedy. Terms, like “islamophobia” “antisemitism”, “genocide”, “terrorism”, “resistance,” war crime,” “occupation,” “starvation” and “massacre”, are dominating the scene, and their definition is often abused and misused to suppress the reality (Alsultany, 2024; McDoom, 2024; Segal, 2024; Üngör, 2024). The crisis between Palestine and Israel “is affecting the discursive and lexical levels, via an outburst of lexical creativity: new words have emerged in both the public and private spheres to find ways of expressing new realities” (Reboul-Touré, 2021, p. 400). Overall, the Israeli-Palestinian war has been excessively assessed as a humanitarian crisis that resulted in enormous fatalities; little do researchers tackle this issue as a linguistic crisis. Hence, this research examines the Israeli-Palestinian conflict from a new perception that aims to investigate it as a case study that depicts

a typical conversational failure. In tandem with the linguistic clash that may occur between the speakers who are expressively engaged in the Israeli-Palestinian conflict, this study analyzes the media's power to embrace both sides of the story to dictate an ideological perception of the strife.

2.2 Media's Power to Manipulate Discursive Crises

Debates on contentious matters are generally regulated within the confines of media and social media outlets which are undoubtedly requisites for communicating with the public opinion, but these platforms are still exposed to fallacies and delusions (Gabsi, 2024). According to Theocharis et al. (2023), media is intertwined with politics, and thus it holds no innocent messages. This idea is supported by Ibrahim et al. (2025) who argue that the genuine purpose of media behind tracking crises is not to record the reality but rather to construct a new reality. The initial aim of media is to communicate with the audience. For this reason, it carefully selects the news material, which necessarily abides by the norms of the society and adheres to the public's needs and interests. The media establishes a correlation between the public speech and the political speech in order to create a balance between the social sphere and the authority system (Santos et al., 2022). For the media to succeed in controlling the dialogue and passing hidden messages to listeners, various linguistic techniques are adopted. This section is divided into two major parts to showcase the media's power to dominate the dialogue. The first part is specifically devoted to reviewing previous discursive crises and how media dealt with them. The second part focuses on the connection between media and the Israeli-Palestinian crisis.

2.3 Media's Control over Previous Linguistic Crises

Previous studies delved into the lingual instruments that media resorts to in time of crisis. A significant part of the literature has focused on the quality of the delivered message, showing that media's language is generally dominated by power, politics and the like (Gabsi, 2024). Öhman et al. (2016) argued that media exerts much effort in reporting crises. Accordingly, the choice of the news material is made deliberately careful. This section illustrates the linguistic techniques employed by media based on their style, content and effect. The style of media focuses on how the message is delivered. The content of the delivered message aims to encapsulate what is being represented. Finally, the effect of the message is shown via answering why the structure of the message is established in a certain way.

Media discourse is distinct from any other type of discourse as it uses language selectively and with a specific style. Asadchykh et al. (2025) studied media's stylistic and lexical tools in polarizing discussions about the Russian-Ukrainian war. The results showed excessive utilization of ambiguous terminologies, euphemistic expressions, and a series of hyperbolic wordings. These linguistic tools are used to influence the public's perception of the war. The findings suggested that media tends to use the language implicitly and indirectly to soften the message so as to mislead the audience. In a similar vein, Nigato (2023) illustrated Bekur newspaper's coverage of the war in Ethiopia in four publications using Critical Discourse analysis (henceforth CDA). The aim of the study was to decipher the lexis that media uses to portray opponents. The results demonstrated a huge gap in representing the adversaries by media. The analysis focused on the duality of "us" versus "them". Highly pejorative expressions were selected to portray the "them" while positive vocabulary was employed to depict the "us". The dichotomy between "us" and "them" is also highlighted in the work of El-Nawawy and Elmasry (2024) who investigated the framing techniques used by media outlets in portraying Syrian refugees and Ukrainian ones and concluded that reportages favored Ukrainians over Syrians. The former were reported as victims worthy of sympathy and support whereas the

latter were mostly associated with pejorative terminologies representing them as threats and dangers. These representations provide empirical support for the bias of media and its double standards. The same situation requires different reactions as not all groups are similarly valued.

Media's subjectivity aims to deepen power relations. Kilgo and Mourão (2021) argue that in the case of having people protest against established powerful institutions, media tends to reflect on these movements from a pejorative angle so as to silence these resisters and prevent them from influencing others as well as to discourage people from joining such social movements. The derogatory glossary is frequently present in outrageous situations such as protests and manifestations with degradation of intensity. A close scrutiny of the traits of the media lexicon reveals a consistency in applying implicitness when sending hints and a clear alternation between pejorative expressions and positive ones depending on the party which is being described.

Along with the choice of words, media's topics abide by certain themes. Kyriazi (2025) argues that media "may strategically highlight or hide evidence, alternative solutions, or perspectives to promote a specific agenda or align with certain interests" (p. 4). In this sense, media does not report every story that happens but rather selects a particular story among others to be the main topic for discussion. The findings showed shifts in framing salience depending on the topic and the timeline and demonstrated how politicians exploit communicative crises to impose particular topics and give them more importance over other issues. According to Öhman et al. (2016), media does not usually give voice to minorities, instead it compels to the norms of the dominant forces in the society, and thus it covers what it is supposed to be covered. The minorities are not necessarily those who are marginalized; some groups are not represented despite their large number because they do not have the power to dictate what to be presented. By this strategy, media reinforces social hierarchies through adhering to the dominant powers.

Su et al. (2024) examined media's framing techniques in visualizing sexual violence through a comparative approach designed for highlighting the different strategies employed in reporting assaults experienced by different women from different social movements. The results emphasized that sexual violence and gender inequality are either "weaponized" or "reframed as partisan issues" in line with the orientation that the media adopts. The problem of sexual violence was dealt with from a white culture and identity rather than a global perspective which means that media fails "to provide a common language to a citizenry deliberating on political action regarding gender justice" (pp. 255-56).

In politics, media is used as a tool to promote the reputation of politicians (Alonso Curbelo et al., 2025). Accordingly, the content of the media discourse is embedded in politics. This is shown by Ibrahim et al. (2025) who used framing theory to analyze the Ukrainian-Russian conflict. The authors compare western with Arab media in reporting the war. The study showcases a strong correlation between the number of deaths and the number of reports in Aljazeera whereas BBC tends to focus more on "diplomatic narratives and policy considerations" while portraying the injuries. The authors conclude that Al Jazeera's reportages tend to be more sentimental in describing the horrors of the war whereas BBC's serves political agendas by maintaining a political tone. In conclusion, not only are the topics carefully chosen but also the representatives of the topics. In other words, media selects the topic and the angle from which the topic is to be tackled.

According to Djerf-Pierre et al. (2024), media relies on the foregrounding technique to shape people's interest in learning about the news. The more media concentrates on a particular event, the more people become interested in knowing additional details about it, and eventually their initial beliefs become more vulnerable and subject to be replaced with new perceptions as

they are consuming the information provided by media. The style and content of media's news are interconnected. Media discourse favors a version of the story over other versions in any discursive crisis to facilitate the polarization of the public opinion.

The content of any message is primarily informative. However, media's news rather hides strategic objectives. Zappettini et al. (2021) linked media discourse to the theory of "emotionalization" which states that mediated messages are laden with sentiments, in the sense that they target rationality by provoking emotions. This assimilation highlights media's power to attract, persuade, and implore recipients. Lei (2025) examined the Chinese media's strategies in shaping the public views on Covid 19, which is considered as a major health crisis, in four English leading newspapers, using CDA, mainly the Discourse-Historical Approach (DHA). The findings delineated media's insistence on highlighting the collective efforts of China to mitigate this pandemic so as to portray China as a united nation. This image that media created is embedded in a cultural background within the Chinese nation. This image aimed at diffusing tension among critics of the Chinese government.

Additionally, the results underscore media's reliance on latent cultural contexts in covering the news which means that media seeks to assimilate its reports with the audience's culture so that the viewpoint of the media would be covertly consumed. Media's main purpose is to establish an idealized perception of the world where ideas no longer compete in a marketplace environment (as suggested by Mill's notion of free speech principles) but rather one idea is dictated and grasped as the ultimate truth. Djerf-Pierre et al. (2024) explain in this sense that media's linguistic techniques, adopted to foreground ideas, have two main effects on the audience. First, the repetition of the same input renders people more doubtful about their held beliefs and become willing to reconsider them and adjust them to fit into the media agenda. Second, if people's beliefs align with those of media's, they are likely to hold onto them.

Whenever there is a debate resulting from a crisis, media emerges as the only provider of facts and resources. It positions itself as the representative of the public opinion, which furthers the gap between the different members of the society. Bode et al. (2018) argue that media discourse shapes people's understanding of crises. The abundance of news renders people more engaged in debates, and thus more vulnerable to get involved into direct conversations. However, in some crises, people shift their concern towards the issue that produces the most riot and discord as it is the case for the Israeli-Palestinian conflict which is highly documented by media outlets due to its centrality in the worldview.

2.4 Media's Control over the Israeli-Palestinian Crisis

The Israeli-Palestinian conflict has been at the core interest of linguistic studies. This bone of contention has been excessively tackled from two restricted angles. It is either explained in the lens of the Israeli perspective or in the lens of the Palestinian one. El Damanhoury and Saleh (2024) argue that western media depicts an Israeli framing to report the war whereas Arab media leverages a Palestinian framing. In this section, the research focuses on the most prevalent orientations that project on the issue from a linguistic perspective with special focus on media discourse and its depiction of the matter. For the purpose of maintaining neutrality and objectivity, only the related work of outsiders who are not directly involved in the matter is being reviewed.

Various linguistic tools have been used to describe the abovementioned plight. Sharaf Eldin et al. (2024) explore the conceptualization of metaphors in describing the Israeli-Palestinian conflict. The feud between Israelis and Palestinians is grounded in metaphorical expressions of vicious versus virtuous exhibitions. The findings propose similarities in using metaphors of

“existence and survival” by both adversaries to urge for external support. The authors indicate that metaphors influence people’s perception about the longitudinal war between Israel and Palestine, frame reality, and form political actions. Metaphors are used to reflect images in the mind of the receiver, aiming to gain empathy.

In a similar vein, Gabsi (2024) studies the use of irony in three interviews addressing the Israeli-Palestinian conflict. The focus is on the interviewees’ discourse, which reveals a strong indirect denunciation of the conflict in the form of ironic expressions to criticize the world’s understanding of the war as well as media’s reflection on the matter. The research demonstrates the efficiency of using less provocative language to project on this critical situation in order to cope with the media’s tendency to bias. Gabsi (2024) also insists that the language of the media when describing Palestinians is characterized by the notion of dehumanization, which portrays people as less than humans, and thus as deserving of the violence they face daily. The linguistic devices used by researchers aim to describe and contextualize the war. This description has affected the way people view the plight.

Altahmazi and Abid (2025) study cognitive pragmatics and its applicability to comments on YouTube about the Israeli-Palestinian plight. The research investigates the style of argumentation used by internet users in conceiving and assigning the status of victimhood to one of the combatants. Similarly, Kalhousova et al. (2025) note that there is a mismatch between people’s opinions and those of their representatives in perceiving the Israeli-Palestinian conflict as “politicians are much more unified in their pro-Israel views than their voters” (p. 153). In the context of media and politics, Bhowmik and Fisher (2023) argue that CNN reports the conflict from a purely Israeli approach with complete negligence of historical backgrounds and total exclusion of the Palestinian side of the story.

The common ground between all the discursive crises, including the case of the Israeli-Palestinian crisis, is the media’s tendency to control the narrative. Media concentrates on “visual framing” in capturing the audience. It relies on the relation between the eye and the mind (cognition). People tend to believe what they see, and thus this technique is useful in misleading the audience. Media representatives control images and thus are able to control memory because people memorize what they see more effectively than what they hear. They even control what to show people; they do not give the full pictures or videos but rather sequences to distort reality (El Damanhoury & Saleh, 2024).

Several researchers have applied framing theory to decipher media coverage of the news. Previous studies on framing theory focused on the reporting techniques, and how media coverage of an event works. The idea of how interviews are used to frame an event is overlooked. The originality of this article lies at the core of investigating the framing techniques used by interviewers when interviewing the interviewees. Previous studies focused on news reporting and TV shows whereas this study focuses on the framing techniques used in an interview. This study originates a transition from passivity to activity. In other words, previous scholarship used to investigate how media frames events rather than discourse. In this study, it is argued that media personalities use frames to conceal and obscure their subjectivity in interpreting a controversial issue with the intent to force people into consuming a specific version of the story. Both Gabsi (2024) and Altahmazi and Abid (2025) focused on the interview between Piers Morgan and Bassem Youssef as a case study. Gabsi (2024) focused on irony whereas Altahmazi and Abid (2025) focused on pragmatic competence to investigate the YouTube generated comments on the interview under investigation. This study’s focus is on the framing techniques adopted by the interviewers rather than reportages.

The most prevalent linguistic theories that have been excessively applied in media studies are CDA and Framing Theory. They have proved to be of effective assistance with unraveling media strategies in reporting problematic issues. Though CDA has impactful results in analyzing crises, framing theory remains more prominent among media discourse analysts as it gives insights into the controlling forces of perception. According to Iacob (2022), there is scholarly consensus on the efficacy of three main theories in elucidating media discourse, which are “priming, agenda-setting, and framing” (p. 47). This study employs Goffman’s framing theory as a theoretical framework.

3. Theoretical Framework

Goffman’s framing theory (1974) is based on the assumption that individuals tend to fully understand proposed information in small portions. In other words, people grasp a particular input gradually (Goffman, 1974, as cited in Omeni & Al Khathlan, 2024). Lyu and Takikawa (2022) argue that frames work as stimuli that elicit both cognitive and sentimental reactions and are often used by powerful entities to dominate the narrative. Frames can be positive or negative representations of a particular topic, action, or entity. The choice of the type of depiction depends on the framer’s perception of the reality (Legendijk et al., 2021). People are introduced to different frames at the same time. The connection between those frames depends on the media’s style to establish the link (Iacob, 2022).

Framing theory entails the presence of other factors that determine the intended hints. According to Iacob (2022), frames aim to construct meaning out of trivial details based on previous social and cultural awareness. The main objectives derived from framing theory are “problem definition, causal interpretation, moral evaluation, and/or treatment recommendation for the item described” as well as attention distraction and value teaching (Entman, 1993, as cited in Iacob, 2022, p. 44). “In practice, there are two approaches to identifying and analyzing frames in news: qualitative, inductive, such as discourse analysis; and quantitative, based on deductive content analysis, using predefined frames” (Iacob, 2022, p. 45). From a linguistic methodological approach, “frames are identified by following the selection, structure, and placement of certain words and phrases in a text” (Iacob, 2022, p. 46). Media can frame by either words or images, which are typically in the form of news, to shape the public opinion. Framing theory has been successful in studying media discourse as to unravel power representations. Selecting this theory to analyze the Israeli-Palestinian rifle helps detect instances of dominating opinions. Table 1, which is adapted from Linström and Marais, 2012, p.28, illustrates the different types of frames that are used by media presenters.

Table 1
Frames Identification Procedure

Types of frames	Definition
The human impact frame	“Descriptions of individuals and groups affected by an issue.”
The powerlessness frame	“The dominance of forces over weak individuals or groups.”
The economics frame	“The preoccupation with profit and loss.”
The moral values frame	“Morality and social prescriptions.”
The conflict frame	“Game interpretation of the political world as an ongoing series of contests, each with a new set of winners and losers.”
Issue-specific frame	“Pertinent only to specific topics or events

Generic frame	“Transcend[s] thematic limitations and can be identified in relation to certain topics.”
Attribution of responsibility frame	“Presenting an issue or problem in such a way as to attribute responsibility for causing or solving to either the government or to an individual or group.”
The human interest frame	“Bringing a human face or an emotional angle to the presentation of an event, issue or problem.”

Within the context of social communication, framing strategy is often present in every told story. People tend to construct information by using not only their own words but also their own understanding of the events. “They do this by ‘select[ing] some aspects of a perceived reality and mak[ing] them more salient. Promot[ing] a particular problem definition, causal interpretation, moral evaluation and/or treatment recommendation” (Entman, 1993, p. 52, as cited in Santos et al., 2022, p. 33).

4. Methodology

The first step in collecting the data was watching Piers Morgan’s and Bassem Youssef’s interview entitled, “Israel-Hamas War: Piers Morgan vs Bassem Youssef On Palestine's Treatment | The Full Interview”, which lasted for 33 minutes and 15 seconds . The interview, which is captured in Figure 1 (Gabsi, 2024, p. 10), was aired on Talk TV and posted on YouTube on 17 October 2023. The video was retrieved from the following web site: <https://www.youtube.com/watch?v=4idQbwsytUo>. Interestingly, the interview went viral reaching 23 Million views as per May 2025.

Figure 1

Screenshot of Piers Morgan and Bassem Youssef’s interview



The second step was to look for the transcribed interview by typing the appropriate keywords on Google search engine. The full transcript was taken from “Scraps from the loft” website retrieved from (<https://scrapsfromtheloft.com/tv-series/israel-hamas-war-piers-morgan-bassem-youssef-on-palestines-treatment-transcript/>).

As a final step, the data was copied and pasted on a Microsoft Word document for analysis. The total of 4581 word count was read and reread for better understanding of the corpus. Since the study’s primary focus is on the framing techniques used by media presenters, only the speeches of Piers Morgan, which count 1299 words, were selected for analysis. The latter is a famous British journalist that has had a significant background and a quite interesting history

with issues related to free speech and censorship, which makes him a good fit for understanding the power of media in the context of expression and dialogue. In addition, the choice is reinforced by the assumption that Morgan's discourse was more defensive, trying to defend Israel, and provocative than Youssef's as he is the host and thus he controls the discourse and is responsible for asking questions and giving clarifications of the answers.

4.1 Data Selection

The selection of the corpus aims at combining between convenience sampling and purposive sampling approaches. The interview of Piers Morgan and Bassem Youssef is easily accessible on YouTube and, its transcript is already available as well. The study uses secondary data as a material for text analysis. The purpose behind choosing the corpus is because of its popularity and the influence it has had since its release. The corpus is relevant to the study's objectives as it offers data for detecting the framing techniques. The selected corpus, which is an interview, is still exposed to public dialogue and media discussions. Hence, it has a close connection with specific ideological orientations.

4.2 Data Analysis

This study applies the qualitative analysis method, mainly focusing on framing theory. Media frames, which are illustrated in Table 1, are used. As for the quantitative analysis method, the paper uses manual deductive coding and statistical analysis through IBM SPSS Statistics 26.0 software.

4.3 Procedure

In this study, framing analysis follows Semetko and Valkenburg's (2000) approach, which suggests answering 20 yes/no questions represented in Table 2, which is cited in Reyes-Sosa, 2020, pp. 185-186. This study uses both quantitative and qualitative research methods. The difficulty of coding is acknowledged by many researchers and the mixed approach has been suggested to maintain reliability and validity of the results (Şenocak, 2017, p. 255). This paper employs both research methods in analyzing Morgan's and Youssef's interview. Coding is used in framing analysis, and this study is based on manual coding. In this article, framing theory is adopted to unravel embedded frames used by Piers Morgan to cover the Israeli-Palestinian war to reveal and conceal some parts of the reality to impose an ideological perception of the war.

The aim is to understand the chosen frames by interviewers and their frequency and how they differ in relation to frames used by politicians and journalists or other media outlets. Based on the guiding questions which are proposed to help researchers understand and detect frames in a text (see Table 2), this paper followed this framework while analyzing the data. A deductive manual coding, which is based on "identifying potential frames and associated framing devices through linguistic analysis" (Song et al., 2025, p. 9), is equally applied. The manual coding is demonstrated in Figure 2, which is suggested by Moncada et al., 2024, p.6. The detection of frames is based on annotating each segment of speech (sentences) by keywords and main topic idea (Lyu & Takikawa, 2022). To ensure that the coding is objective, a comparison between a number of studies that used the same frames and the coding of the study is made.

Table 2
Questions to Identify Frames

Frames	Questions related to the detection of frames
Attribution of Responsibility Frame	1. Does the story suggest that some level of government has the ability to alleviate the problem? 2. Does the story suggest that some level of the government is responsible for the issue/problem? 3. Does the story suggest a solution to the problem/issue? 4. Does the story suggest that an individual (or group of people in society) is responsible for the problem/issue? 5. Does the story suggest that the problem requires urgent action?
Conflict Frame	6. Does the story reflect disagreement between parties/individuals/groups/countries? 7. Does one party/person/group/country reproach another? 8. Does the story refer to two sides or to more than two sides of the problem or issue? 9. Does the story refer to winners and losers? 10. Does the story include quotes from those in disagreement?
Human Interest Frame	11. Does the story provide a human example or “human face” on the issue? 12. Does the story employ adjectives or personal vignettes that generate feelings of outrage, empathy, caring, sympathy or compassion? 13. Does the story emphasize how individuals and groups are affected by the issue/problem? 14. Does the story go into the private or personal lives of the actors? 15. Does the story contain visual information (photo/video) that generates emotion?
Economic Consequences Frame	16. Is there a mention of financial losses or gains now or in the future?

	17. Is there a mention of costs/degree of expense involved? 18. Is there a reference to economic consequences of pursuing or not pursuing a course of action
Morality Frame	19. Does the story contain any moral message? 20. Does the story have reference to morality, God, and other religious tenets?

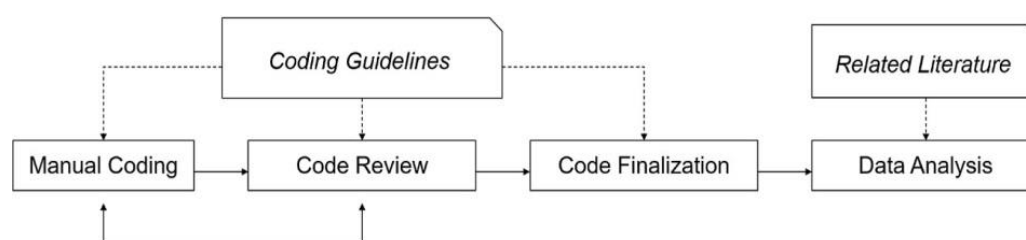
The qualitative content analysis is based on two major elements: “manifest content and latent content”. The first focuses on frames which are explicitly expressed whereas the second focuses on implicitly expressed frames (Zag & Mifdal, 2024, pp. 6 -7). The research highlights how the discursive crisis is manifested through frames. According to D’angelo (2017), the process of qualitatively identify frames includes three steps which are represented in Table 3, which is adapted from D’angelo (2017, p.5).

Table 3
Qualitative Framing Analysis

Framing devices	Examples
Format-based presentation features	headlines, visual scenes and still images, pull quotes, backgrounders, hashtags, charts.
Discourse structures	metaphors, catchphrases, keyword patterns
Image attributes	facial expressions, camera angles, image cropping and sizing

Figure 2

The Procedure of Coding



5. Findings and Discussion

5.1 Qualitative Analysis

The qualitative analysis highlights the framing techniques used by Morgan in controlling the narrative and shaping the public opinion about the Israeli-Palestinian war. The main patterns used by Piers Morgan are interruption, contradiction, double standards, repetition, frequently changing topics, avoiding answering questions and / or reformulating questions. These

techniques are used to frame the speeches of Bassem Youssef and reconstructing a different interpretation from the original message he holds.

5.1.1 The Human Impact Frame

The human impact frame is based on the act of projecting the impact of war on human beings. Media depiction of victims and civilians seems to be contradictory and full of bias. Piers Morgan made a clear point that there is a difference between a human being A and a human being B which can be represented in a mathematical equation as $A > B$ and $B < A$. While there are well-defined human rights and well-defined animal rights, there are some categories of people that are neither humans nor animals and thus have no access to basic rights. This phenomenon is referred to by scholars as the concept of dehumanization. Some lives are not only more important than others but also do not bear comparison.

“I feel that the scale of what Hamas did on October the 7th supersedes anything else I’ve seen in this conflict, really ever”. This assertion, as quoted by Morgan, suggests that killing Israelis is more hideous and condemning than killing Palestinians. In other words, Israeli lives matter but Palestinians’ do not. Morgan frames the conflict from only how Hamas reacted towards Israel, deliberately excluding the image of what Israel did.

Morgan overtly describes the Israeli victims with a tone of empathy and condemnation to what happened to these innocent civilians “the savagery, the butchery, the slaughter of 1,300 people, the shooting of babies” and, he chooses very pejorative lexis to reflect on the horrors of war that inflicted Israeli civilians. On the contrary, he seems to avoid any description of the Palestinian victims. “No, you don’t need to because in a way, you’re preaching to the choir. I’ve followed this crisis”. The repetition of words such as “*savages*, like *a pack of savages*” to refer to Hamas shows how Morgan is interested in imposing a particular image about Hamas while completely ignoring the Israeli side. He also asked Youssef to stop describing the Palestinian victims because it is already well-known to the audience that Palestinians are killed in the war.

According to Morgan, the description of Palestinian victims is just some redundant information whereas the description of the Israeli victims is a reflection of the horrors of the war. In this type of frame, Morgan focuses on pejorative vocabulary, which contains lexis of blood, killing, suffering, and brutality, to describe the Israeli’s plight. He completely ignores the Palestinian victims by referring to the whole population as Hamas. Morgan insists on dehumanizing Palestinians by describing Hamas as terrorists and savages while assimilating them with the whole Palestinian community.

5.1.2 Powerlessness Frame

The dichotomy between dominance and weakness, strong vs. weak, victim vs. victimizer, is present in Morgan discourse. When confronting with Israel’s actions, Morgan resorts to the powerlessness frame to insist on Israel’s unwillingness to start a war and its compulsion to fight. The war is framed as inevitable and, Israel is forced into it with complete passivity. To further justify Israel’s actions, Piers frames the question indirectly to make Youssef adopt the situation and reach the conclusion that Morgan aims to draw. Morgan attempts to gain Youssef’s support by portraying himself and every Israeli supporter as powerless entities that are forced to defend themselves using violence.

“I honestly don’t know what the proportionate response is. I honestly don’t. I don’t. I’ve been watching the airstrikes. Well, I would ask you, if you were Israel, what would you...”

The repetition of the segment “I don’t know” frames the situation as hard and unsolvable which pushes the audience into a one and only solution and thus justifying Israel’s actions and killings of Palestinians. The excessive use of the conditional: if + simple past which indicates unreality in the past is reinforced to remind Youssef that he cannot be in the place of Israel so he is unable to judge its actions. The framing technique used here is not only *to reflect* on Israel’s powerlessness but also to reveal the outsiders’ powerlessness to respond in a different way other than the way chosen by Israel.

5.1.3 Moral Values Frame

“Well, it’s not me, it’s not me, guys. I’m not on either side here”.

Morgan insists that he abides by the morals that dictate objectivity. He frames himself as neutral and not directly involved in the Israeli-Palestinian conflict. Excluding the self and concentrating on this technique aims at framing the situation of any outsider who is overtly adopting a side of the story. In the case of the Israeli-Palestinian conflict, it is made impossible for people to maintain neutrality especially in the context of interviews where the interview itself represents a clear evidence of involvement in the matter. Piers tries to hide his ideology and bias by insisting on distancing himself from the issue.

The crisis in the discourse between Morgan and Youssef is manifested in the interruptive sentences used by Piers and, when accused of silencing Youssef, Piers frame the interruption by redefining it as a way to let Youssef speak.

“Bassem, I want to say two things. One, if you could just slightly manage your language, we are uncensored, but if you keep swearing, we have to apologize to viewers who may be offended by that”

In this statement Piers frames the dialogue from a purely moral angle. He aims at making the audience believe that Youssef’s language is full of swearing that hinders the discourse. Piers deviated from the original topic and the main topic of the conversation to criticise Youssef’s way of expression. This frame aims at distracting the audience and the interviewee as well to make them forget the initial message and mislead them in the course of the discussion. .

5.1.4 Conflict frame

The conflict frame is represented in terms of winners vs. losers and in light of the duality of the good and evil. The confrontation between Israel and Palestine is no longer seen as a humanitarian crisis but rather as an act of heroism and resistance against evil. This frame promotes for the justification of the killings.

“But once Israel, once Israel has decided that they want to get rid of Hamas, and Hamas is embedded with civilian population, I’m very concerned about what’s going to happen next. I’ve written a column tonight saying, I remember the Iraq war, which I opposed, right? I remember all this. So my question to you is, what would be, what would you think would be in response by Israel to what happened?”

Morgan establishes an assimilation between the world's war against ISIS and the Israeli war against Hamas, which stands for all the Palestinians. In this frame, the conflict is portrayed as not only beneficial but also requisite for maintaining global peace.

5.1.5 Attribution of Responsibility Frame

“You keep talking about westerners like me, okay, so let me return the favor. Okay, Hamas is dedicated to the complete eradication of Jewish people.”

Morgan frames the war in terms of who is responsible for this crisis and who is just obliged to take part in the crisis. He insists that Hamas is the one, which initiated the war, and the one responsible for the killings on both sides. He ignored the historical context of war and limited the horrors of war to the seventh of October 2023. This technique aims at controlling the present and the past by leading people into believing that the conflict is new and that only Hamas is to be blamed.

5.1.6 Human Interest Frame

“No, no, it's not about me being great... It's about... It's about the way Hamas behaved on October the 7th was like savages, like a pack of savages. It was the worst atrocity against Jewish people since the Holocaust. There has to be a response. And my question, be... My question for you is, what is the proportionate response?”

Morgan establishes a correlation between the Holocaust and the Seventh of October 2023. He relied on the historical background of the Jewish plight as well as the images it brings to mind to gain empathy from the audience and make them more capable of accepting the Palestinian casualties.

5.2 Quantitative Analysis

A frequency analysis was conducted on 51 coded speech segments to identify the presence of six framing categories: Attribution of Responsibility, Human Interest, Conflict, Moral Values, Human Impact, and Powerlessness. The results show that Attribution of Responsibility is the most frequent in the analysis, representing 19.6% of the segments ($M = 0.20$, $N = 10$). This suggests that Morgan resorts to blaming and attacking the interviewee's viewpoints rather than supporting his own opinions. The Conflict frame appears in 17.6% of the segments ($M = 0.18$, $N = 9$), which proves that the conversation is conflictive and unfruitful. Moral Values and Powerlessness frames are also present in the analysis ($M = 0.16$, $N = 8$), indicating how the war is inevitable and in times requisite and, resorting to morality is meant to silence Youssef and distract the audience. However, Human Interest and Human Impact are used infrequently. Human Interest is observed in only 5.9% of segments ($M = 0.06$, $N = 3$) and Human Impact in 3.9% ($M = 0.04$, $N = 2$). These results suggest that Morgan is immersed in passing ideologies instead of concentrating on the conflict as a matter of a humanitarian crisis.

5.3 Discussion

This study is consistent with some previous studies in various ways. Gabsi (2024) insisted that supporters of Israel use the dehumanization technique more frequently to advocate for the war and justify the killings of Palestinians. This is shown in Morgan's discourse when he ignored the plight of the Palestinians and only reflected upon that of Israelis (Djerf-Pierre et al., 2024).

Piers Morgan uses different frames to tackle the Israeli-Palestinian conflict. He frames the conflict as a binary struggle of two opposing adversaries, which raises tension and advocates

for a war game as suggested by Gabsi (2024). He repeatedly pressures Youssef to blame Hamas and condemn it as terrorist and responsible for the plight. He frames Youssef's views to move the blame from Israel to Hamas while completely ignoring the content of Youssef's messages. The interviewer utilizes the moral frame as an excuse to silence Youssef and make his speech sound unacceptable due to the cursing style of the interviewee. Instead of focusing on condemning only the swearing words, Piers frames the full speech as unacceptable.

The linguistic devices that Piers Morgan chooses to use shape the audience perception of the war in several ways. The constant and excessive use of pejorative vocabulary related to the lexis of death, destruction, and sufferings renders the audience more sympathetic with the Israeli victims and, thus they would support Israel's actions without questioning or criticizing its policy. The repetition of the question "Do you condemn Hamas' actions?" even after Youssef responded with yes shows how Piers insists on controlling the narrative and forcing the interviewee to adopt the views of Piers, which causes a discursive crisis between the interlocutors.

Although media presenters assert their commitment to neutrality, Morgan's interview exemplifies how media discourse is full of bias and subjectivity. Despite the calm tone of Morgan, the framing questions and the frequent interruptions of Youssef's answers demonstrate the embedded ideological views of Piers, which align with the Israeli policy and politics.

6. Conclusion

The main findings of this research suggest that Morgan resorts to specific framing techniques, which reflect his double standards, contradiction and his tendency of dehumanization. Piers Morgan's discourse is a manifestation of media framing discourse. His repetitive questions and frequent interruptions of the interviewee in order to distract the audience serves as a polarizing tool to shape the public opinion. Morgan often interrupts or redirects Youssef, maintaining narrative control. This communicative dominance reinforces his framing and suppresses alternative perspectives. These techniques contribute to the polarization of public opinion by reducing the complexity of the conflict to emotionally charged binaries and promoting moral alignment with one side.

This study only focuses on the speeches of Piers Morgan in only one specific interview with Bassem Youssef, which makes it not suitable for generalization. Excluding Bassem Youssef's speeches limits the capacity of studying the interactive techniques. The context of war dominates the discourse and, this may impact the perception of Piers Morgan's ideology. This study exposes media bias despite its efforts to conceal it thanks to the framing techniques it applies. The findings help the public understand conflicts from an ideological viewpoint. This study can be used in educational settings and by linguists interested in CDA and framing theory.

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Decoding Empowering / Disempowering Concepts in English Media Discourse

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Abstract

This chapter examines how English media discourse constructs and disseminates empowering and disempowering concepts, shaping social perceptions in contexts often marked by psychological and social crises. Media discourse involves language and semiotic codes across massive information sources. Drawing on transmedia theory and cognitive semiotics, the study explores how modern technologies enable dynamic narrative distribution across platforms and podcasts. The focus is on psychological, parenting, and self-development narratives embedding empowering and disempowering language that influences cognitive and emotional perceptions amid crisis experiences. The methodology employs classification, component, and intentional analysis, emphasizing verbal constructions and lexical markers shaping empowerment or disempowerment. Empowering discourse relates to agency, resilience, and emotional intelligence, framed through contrast, modality, and inclusive tone. Disempowering discourse highlights psychological vulnerability, trauma, internalized blame, or false empowerment, often linked to crisis and crisis discourse. Using a cognitive-semiotic approach, the research analyzes linguistic and extralinguistic cues, constructing emotional and mental models in audiences. Narratives either strengthen or weaken self-worth and control, particularly within family dynamics and trauma-informed discourse during crises. Findings reveal that empowering narratives frequently arise from reframing adversity as opportunity, fostering self-awareness and growth. Disempowering and falsely empowering discourses shape emotional realities and long-term identity formation. Ultimately, media discourse is argued to be a powerful psychological tool that promotes resilience or reinforces vulnerability, especially in crisis contexts. Critical engagement with media discourse is essential for creators and consumers in a digital, participatory media environment.

Keywords: empowering concept, disempowering concept, media narration, media discourse, media platform

1. Introduction

The advancement of modern technologies has made it impossible for information to exist and circulate in a single format. Today, promoting books online – primarily through various media platforms – has become an essential aspect of daily life. Media discourse is marked by a wide range of themes, with narratives shared across platforms like Instagram, Facebook, Spotify, and YouTube. Media discourse represents the forms of language and other semiotic codes, structures, and usage of massive information sources. Media discourse refers to interactions through a broadcast platform, whether spoken or written, in which the discourse is oriented to a non-present reader, listener, or viewer. Today, the attention is focused on the main

social issues, but the problems of self-development and creating a successful personality are crucial. Thus, modern media platforms are critical in influencing public narratives, employing language, tone, and representation to amplify or undermine media narrations. This study uses a discourse analysis approach to unravel the linguistic, rhetorical, and visual strategies that frame self-development, identity, and upbringing issues in diverse contexts, including gender, class, and culture.

Transmedia technologies have significantly transformed and broadened contemporary society's commercial, social, and communicative dimensions and the creative methods employed in education. In exploring transmedia as a phenomenon within the modern media landscape, it is essential to reference the work of Jenkins (2006), who conceptualizes transmedia storytelling as a distinct modality of information transmission. This modality is realized through verbal and non-verbal communication across multiple media platforms; wherein discrete narrative elements interrelate and complement one another to form a cohesive informational universe. According to Jenkins (2006), a transmedia product is characterized by several defining features: the rapid dissemination of content across platforms, narrative expansion and depth facilitated by the use of hyperlinks, plot seriality and narrative incompleteness that invite further development, subjective representation of information enabled by the multidimensional nature of hyperlink structures, an immersive experience engendered by the integration of advanced technologies and diverse media formats, and dynamic interaction between content creators and the audience, often resulting in participatory engagement and co-creation.

These characteristics underscore transmedia storytelling's multimodal, participatory, and open-ended nature, positioning it as a powerful instrument for cultural production in the digital age (Jenkins, 2006). According to its broad definition, this is the essence of transmediality: the communication of information across multiple media or sign systems (Saldre, 2012). The empowering and disempowering concepts transmitted by media platforms contribute synergically to the overall meaning of the media narration that accompanies them, with synergy defined as the combined power of a group of things when they are working together, which is greater than the total power achieved by each working separately (Synerge, 2008). The illustrative material will corroborate the synergic effects of verbal language embedded in empowering and disempowering concepts.

Recently, there has been a significant rise in the demand and availability of literature on psychology, motivation, and family relationships, all geared toward personal development and improving interpersonal connections. Professionals such as leading psychologists, influential politicians, and prominent economists are no longer confined to the pages of books; they now operate as dynamic media storytellers who engage audiences through visual and audio-visual media.

The ideas of media narration and media narrative align with the broader concept of storytelling, which traditionally means recounting events. Narratives are embedded in our everyday lives – not limited to novels or historical records – but also found in radio broadcasts, television shows, social media, and even casual conversations. Essentially, anyone can be a narrator, as narration follows a standard structure: the storyteller selects specific events, determines the sequence, chooses the appropriate language and style, and infuses the narrative with desired expressiveness and figurative meaning (Fludernik, 2002).

Understanding and processing information is a vital cognitive function that draws on personal experience. Each person interprets the world uniquely, serving as a bridge between

external reality and its representation. Consequently, media narratives within the media discourse are constantly evolving to meet the demands of the contemporary audience. This analysis refers to examining language and meaning embedded in media texts. This process involves analyzing linguistic elements, symbols, and gestures to uncover how media content mirrors and influences societal norms, cultural values, and belief systems. Through such analysis, it becomes possible to expose the hidden ideologies, power relations, and cultural assumptions that underpin media narratives.

2. Literature Review

Literature review provides a theoretical and conceptual foundation for the study by examining two interrelated domains: media discourse and the concepts of empowerment and disempowerment. A critical understanding of media discourse as a socially and technologically mediated communication is essential for analyzing how empowering and disempowering meanings are encoded, circulated, and interpreted in contemporary media narratives. The review first outlines media discourse's structural and functional dimensions, emphasizing its multimodal and ideologically charged nature. It then considers the cognitive and sociocultural underpinnings of empowerment and disempowerment, particularly their discursive manifestations in identity formation, parenting, and psychological self-development.

2.1 Media Discourse

Media discourse encompasses spoken or written communication delivered through broadcast platforms, directed at an audience not physically present during the interaction (O'Keeffe, 2011). An overview of recent scholarly work indicates that media discourse is not spontaneous or private; it is carefully constructed for a broad audience and remains on record, distinct from everyday conversation or private communication. Media messages are linguistically and structurally crafted to engage distant or non-present audiences, traditionally offering minimal immediate feedback – though emerging digital technologies are increasingly altering this dynamic (O'Keeffe, 2011).

Due to the presenting topics, such as parenting, problems of self-development, and creating a successful personality, media discourse covers various controversial and socially significant topics, such as racism, politics, and public risks (Murata, 2005). Thus, it became apparent that media discourse could not be investigated only through text analysis; it should involve a wide range of investigations which determine cognitive analysis (Biglari, 2023), discourse analysis which highlights the structure and function of language in media texts (Van Dijk, 1983) and framing analysis, which focuses on how news media construct issues through specific syntactic, thematic, and rhetorical structures, involving sources, journalists, and audiences in a shared cultural context (Pan, 1993).

Digital media technologies are transforming media discourse, increasing interactivity and changing how messages are produced, distributed, and archived (O'Keeffe, 2011). Today, it is not enough to publish a book; with the development of technologies, information should spread through different platforms like Instagram, YouTube, Facebook, etc.

This research recognizes media discourse as a multifaceted sign system, integrating essential communication features. It is produced by institutions and individuals and aimed at an audience. The speech genres within media discourse represent complex signs shaped by cultural, informational, and codified dimensions. Media discourse is a complex, public form of communication shaped by language, ideology, and technology. Analytical approaches, such as discourse and framing analysis, help uncover how media messages are constructed and

received, but must account for broader social and technological contexts. As media platforms evolve, so do the forms and impacts of media discourse, making ongoing critical analysis essential. Building on the understanding of media discourse as a complex and evolving form of public communication, it is essential to examine how this discourse contributes to shaping individual and collective perceptions. One significant aspect of this influence is the representation of power dynamics within media narratives. In particular, the notions of empowerment and disempowerment emerge as critical conceptual frameworks through which the media can reinforce or challenge social structures, ideologies, and identities. The following section explores these concepts and their discursive realization within contemporary media texts.

2.2 Empowering and Disempowering Concepts

Understanding and processing information is a vital cognitive function that draws on personal experience. Each person interprets the world uniquely, serving as a bridge between external reality and its representation. Consequently, media narratives within the media discourse are constantly evolving to meet the demands of contemporary society. As environments for transmitting knowledge, media directly influence the audience's cognitive functions. The messages embedded in media are often covert, influencing viewers at both conscious and unconscious levels. These messages can promote empowerment or instill disempowerment depending on the tone, language, and representational strategies.

The concept of empowerment has been widely applied across various disciplines within the social sciences and humanities. In the design field, discourse on empowerment primarily emerges within diverse co-design frameworks. Empowerment and disempowerment are deeply rooted in various intellectual and sociopolitical traditions, including feminism, Freudian psychology, and theology (Simon, 1994). Empowerment refers to the ability of individuals or groups to take control of their lives, make decisions, and act in ways that protect their well-being. Disempowerment, in contrast, involves the removal or suppression of this agency. These concepts are central in media narratives that address identity, parenting, gender, and class.

3. Methodology

3.1 Data

The research material is based on a corpus of forty-five inscriptions gathered from media discourse. It contains the texts of media narrators who work in psychology, parenting, and self-development, united by a standard thematic block of empowering and disempowering concepts. We have used publicly available speeches of such media narrators as Anna Mathur, Becky Kennedy and Terrence Real, their podcasts on Instagram (Mathur, n.d.; Kennedy, n.d.; Real, n.d.), and books (Mathur, 2024; Kennedy, 2022; Real, 2022) on self-development, identity formation, and parenting for this experiment. The validity of this material is substantiated, firstly, by the central role of English media discourse as a primary mode of representing socially significant ideas, and secondly, by the high popularity and influence of the selected media narrators, each of whom has a substantial following (exceeding one thousand users) on digital platforms.

3.2 Research Procedures and Instruments

This study adopts a qualitative design within the framework of cognitive semiotics and media discourse analysis, focusing on the verbal and pragmatic representation of empowering and disempowering concepts in contemporary English media texts. The research investigates how these concepts are linguistically and semiotically constructed to influence cognitive and

emotional perceptions, particularly in narratives related to psychology, parenting, and self-development.

The research is based on the following procedure:

- Classification method to build a paradigm of empowering and disempowering concepts in English media discourse. It semantically classifies empowering /disempowering concepts, identifies their components, and reveals their motives.
- Deductive analysis to study the semantic and syntactic features of empowering and disempowering concepts within media texts.
- Descriptive method for an accurate and complete description of empowering and disempowering concepts.
- Component analysis to study the central semantic units of empowering and disempowering concepts for further comparison.
- Intentional analysis is used to form and analyze the author's intention, which is manifested in the pragmatics of empowering and disempowering concepts.

The combination of qualitative methods grounded in cognitive semiotics and media discourse analysis enables an examination of how empowering and disempowering concepts are constructed and function in English-language media. The integration of classification, deductive, descriptive, component, and intentional analyses ensures both semantic depth and pragmatic insight, facilitating a nuanced understanding of the linguistic and cognitive mechanisms that shape audience perception and engagement.

4. Results and Discussion

4.1 Cognitive Semiotics

As Biglari notes, modern semiotic theory adopts a broad perspective. According to this view, semiotics seeks to examine and clarify the conditions under which, and the ways in which, signs and meanings are (or sometimes are not) conceived, generated, structured, directed, distributed, communicated, shared, sensed, interpreted, embodied, experienced, transformed, translated, and more (Biglari, 2023).

These dimensions of semiosis are particularly central to a branch of general semiotics known as cognitive semiotics (Cogsem). This field, as defined by Jordan Zlatev and others (Zlatev, 2016), is a transdisciplinary, conceptual-empirical investigation of meaning, which inherently involves the study of signs, mind, and communication. The authors identify two main characteristics of Cogsem:

1. Cogsem emphasizes the study of meaning through a transdisciplinary (a deeper integration than “interdisciplinary”) synthesis of methods and concepts drawn from semiotics, cognitive science, and linguistics (Zlatev, 2016).

2. The second feature involves a commitment to what Zlatev (2016) calls the conceptual-empirical loop. This approach begins with a conceptual understanding of a phenomenon, followed by empirical investigation. The results of this research are then used to refine and expand the initial theoretical claims. In essence, the process enhances theoretical insights through real-world experience and fieldwork, a principle referred to as the reinvigoration of theory via empirical findings.

The research adheres to a transdisciplinary framework by synthesizing methodological tools and theoretical constructs from semiotics, linguistics, and cognitive science. It integrates semiotic analysis of media signs and meaning-making mechanisms with a linguistic examination of verbal constructions. It also incorporates cognitive perspectives on how narrative structures influence emotional perception and identity formation. The study is grounded in the principles of the conceptual-empirical loop, whereby theoretical models of empowerment and disempowerment are systematically applied to an empirical corpus of English-language media texts. This iterative process enables the refinement and extension of the initial conceptual framework through data-driven insights, thereby demonstrating how media narratives simultaneously construct and reflect cognitive-affective schemata within the audience's interpretative processes.

4.2 Lexical and Semantic Features of Empowering / Disempowering Concepts

Building upon the theoretical framework and methodological approaches outlined earlier, this section delves into the lexical and semantic characteristics of empowering and disempowering concepts as they manifest in English media discourse. Examining specific lexical items and semantic fields allows a deeper understanding of how language constructs and conveys notions of agency, resilience, and vulnerability, thereby shaping readers' cognitive and emotional engagement.

The empowering concept raises the issue of the interplay of positive transformation, usually from vulnerability, uncertainty, or emotional struggle to strength, agency, and resilience. In contrast, the disempowering concept relates to situations or expressions that strip individuals of agency, self-worth, or emotional autonomy. It can be direct (e.g., abuse, neglect) or subtle (e.g., false empowerment, unrealistic expectations). Words such as 'impotent', 'helpless', 'shame', 'burnout', 'self-criticism', and 'failure' are potent semantic triggers of disempowerment. This study is not whole-field research; however, verbal components that inspire, comfort, and guide the reader were found in the sense of empowerment.

The lexicographic analysis of empowerment shows a wide range of definitions correlating with different aspects of cognitive understanding of the phenomenon. Thus, Merriam-Webster (Merriam-Webster, n.d.) gives such definitions:

1. The act or action of empowering someone or something: the granting of the power, right, or authority to perform various acts or duties;
2. The state of being empowered to do something: the power, right, or authority to do something.

Cambridge Dictionary (Cambridge Dictionary, n.d.) denotes empowering as:

1. Something that is empowering makes you more confident and makes you feel that you are in control of your life.

Collins Dictionary (Collins Dictionary, n.d.) emphasizes that:

1. Something that is empowering makes people feel stronger and more successful than they did before;
2. Having qualities that give a person or a group of people the means to take more control of their lives and become stronger and more independent.

Analyzing the definition of disempowering, we found out that:

1. something that is disempowering makes a person feel that they do not have power or influence (Collins Dictionary, n.d.);
2. making you feel that you have no control over your life and no power to change things

(Cambridge Dictionary, n.d.);

3. to deprive of power, authority, or influence: make weak, ineffectual, or unimportant (Merriam-Webster, n.d.).

The lexicographic analyses provide a conceptual foundation for the subsequent analysis of how empowerment and disempowerment are linguistically encoded within media narratives. The corpus-based exploration and qualitative corpus analysis of empowering and disempowering concepts in media inscriptions reveals a distinct semantic and cognitive dichotomy rooted in emotional, psychological, and social dimensions. Empowering discourse is characterized by linguistic strategies that promote strength, autonomy, and positive transformation, often addressing readers navigating vulnerability or internal conflict.

It refers to the reserve of *positive feelings* we hopefully build up with our children. (Kennedy, 2022, p. 78)

And these *positive feelings* on the inside lead to “good” behavior on the outside—behavior like *cooperation*, *flexibility*, and *regulation*. So in order to create *positive change*, we have to first build connection, which will lead kids to *feel better*, which will then lead them to behave better. (Kennedy, 2022, p. 121)

In contrast, disempowering discourse evokes themes of helplessness, inadequacy, and psychological depletion, with particular lexemes (‘failure’, ‘disharmony’, ‘powerless’, ‘desperate’), serving as potent emotional triggers.

My voice sounded awful on the outside, and my body *felt awful* on the inside—*desperate and powerless*. (Kennedy, 2022, p. 202)

As such, he feels capable of exploring, trying new things, taking risks, suffering *failures*, and being vulnerable (Kennedy, 2022, p. 59).

You experience *disharmony*, mismatch, and *failures*. (Real, 2022. p. 199)

This study provides a meaningful insight into how language in media shapes the readers’ perceptions of self-worth and agency. The lexicographic comparison across major dictionaries highlights the cognitive nuances of empowering and disempowering discourse, reinforcing the conceptual link between language, emotion, and control. Comforting, motivational, and guiding verbal components in empowering content underline the media’s potential role in fostering resilience and self-efficacy.

4.3 Cognitive-Semiotic Correlation of Empowering/Disempowering Concepts in English

4.3.1 Media Discourse

Empowering and disempowering concepts naturally occupy opposite semantic poles, with the former associated with positive transformation, agency, and resilience and the latter linked to internal conflict, emotional vulnerability, and powerlessness. These concepts are realized both linguistically (direct) and extralinguistically (indirect), where the linguistic level involves direct lexical markers, and the extralinguistic level includes indirect, affective, and situational cues.

It becomes evident that extralinguistic realization is closely tied to specific lexical units that reflect emotionally charged experiences.

But avoidance of life’s truths carries the highest price of all. We see burnout, perfectionism, addiction, *anxiety*, people-pleasing, *grief* and so, so much shame (Mathur, n.d.).

You pin your hopes and expectations on an achievement and when it doesn't work, it can feel like a rejection. *Failure* is a part of life and we know that, but it's a *hard truth* to face if we're questioning whether we're the cause. It's hard when *failure* is followed by a barrage of *self-criticism and shame*. Did you just *fail* or are you a *failure*? You may look at the broken hopes around your feet and wonder how on earth you're going to pick yourself up and dare to risk failing again. (Mathur, 2024, p. 36)

The realization disempowering concepts verbalized by extralinguistic units 'rejection', 'failure', 'hard truth', 'self-criticism and shame', 'fail', 'anxiety', 'grief', which describe the disempowering concept. These lexemes are semantically interconnected, constructing a mental model of psychological defeat, emotional fragility, and loss of self-worth. They form a semantic field in which the individual is portrayed as overwhelmed by negative self-assessment and internalized blame.

In contrast, the linguistic realization of empowerment and disempowerment can also be found in direct lexical markers such as empower and disempower:

When he strapped me as a young child, he was beating his own depression and shame into me, grooming me—unless I did the hard work of stopping it—to behave as he did. When he raged, he *disempowered* me as the recipient and, simultaneously, *falsely empowered* me through modeling. (Real, n.d.)

Here, the verbs 'disempowered' and 'falsely empowered' explicitly verbalize the conceptual dichotomy. This lexical clustering activates a disempowering semantic field where emotional and cognitive self-regulation is impaired, leading to a sense of psychological paralysis and helplessness. Such linguistic framing reflects and constructs the disempowering experience in discourse, directly shaping the readers' perceptions of agency and emotional strength.

Besides disempowering narratives, English media discourse activates positive transformations by reframing challenges and emotional struggles as opportunities for growth, healing, and empowerment. In the provided example, empowering discourse is constructed through lexical units and syntactic structures that foster hope, agency, and cognitive reappraisal.

Key lexical units contributing to this empowering conceptualization include 'opportunity', 'heal', 'feel proud', 'can do', 'amazing', 'emotion regulation', 'change', and 'empowering'. These words and expressions reflect a semantic field of positive potential, underscoring agency, progress, and emotional resilience:

Self-care can also feel overwhelming if we frame our attempts at it as another item on the to-do list. "What? I have *to change* all this stuff in myself before I can change things with my kids?" But a simple reframe can transform self-care into something *empowering and hopeful*: "I have an opportunity. I can heal things within myself at the same time as I parent my kids in a way *I feel proud of*. *I can do* both at the same time. (Kennedy, n.d.)

The first is, "Oh no, I'm messing up my kid because I'm messed up. I'm the worst!" But there's another, more optimistic and encouraging interpretation: "Wow, this is *amazing*. If I can work on some of my own *emotion regulation* abilities—which will feel good for me anyway!—my child will change in response. *How empowering!*" (Kennedy, n.d.)

Thus, it becomes clear that empowering discourse is linguistically constructed through positive lexical choices, syntactic clarity, contrastive framing, and modal expressions of control and potential. Such discourse cultivates a sense of emotional efficacy and interconnected resilience by reframing emotional struggles as co-regulatory processes and opportunities for

relational growth. Ultimately, this analysis supports the view that media discourse is a psychological tool capable of shaping readers' self-perception and promoting narratives of empowerment or disempowerment. Language, therefore, is not merely descriptive but constitutive—it actively participates in the emotional and cognitive construction of human experience.

The disempowering / empowering discourse is often tied to family dynamics. Empowerment here is linked to emotional self-awareness and nurturing autonomy in both adults and children:

Not every single tactic will be applicable to every single kid—only you know your child's individual needs—but these strategies will help you *think differently* when challenges arise, and *empower* you to tackle these moments in ways that *feel good to you, and safe to your child*. (Kennedy, 2022, p. 85)

Due to lexical markers like 'empower', 'think differently', 'feel good to you and safe to your child', the narrator constructs a semantic field of agency, emotional intelligence, and relational care. At the same time, the juxtaposition 'Not every single tactic will be applicable... but these strategies will help' introduces pragmatic realism (no universal solution) followed by practical optimism (tools for adaptation). This structure acknowledges complexity while offering hope and agency – a hallmark of empowering discourse.

The empowering concept correlates with a perfect understanding of life:

Also, the power of the *Perfect Voice* strategy is that you're teaching your child how to relate to *her perfectionism* rather than reject it; after all, rejecting a part of us feels like self-loathing. When we talk about the *Perfect Voice*, a child *doesn't see perfectionism as the enemy*; instead, *she feels empowered* to manage the perfectionism when it arises. Once you've tried it, you might even take it a step further and see if your child wants to describe the Perfect Girl (or Boy or Kid) or even draw her; *lots of kids enjoy and benefit from this*, because personifying this voice enables them to feel more grounded and capable of understanding themselves. (Kennedy, 2022, p. 143)

This example illustrates the pattern of empowering discourse in family dynamics and emotional development, mainly focusing on the relationship between self-awareness, emotional regulation, and empowerment. The lexical choices emphasize agency ('how to relate to her perfectionism'), self-compassion ('a child doesn't see perfectionism as the enemy'), and constructive inner dialogue ('she feels empowered', 'lots of kids enjoy and benefit from this'), key components of emotional empowerment in children.

Besides, English media discourse incorporates both disempowering and falsely empowering discourses, expanding the binary by introducing distortions of empowerment, especially in the context of childhood trauma and the development of self-concept.

No one on the street would tell you that Daniel's Adaptive Child was forged through *trauma*, but I would. That's because I likely have a more varied description of what constitutes trauma than the one you think of. Daniel, for example, was subject to *falsely empowering* psychological neglect. (Real, 2022, p. 58)

When we think of *trauma in childhood*, we mostly think of shaming transactions, of words or behaviors that leave the child feeling less than, *impotent, and helpless*. This *disempowering* abuse leaves those who experience it in a shame-based position their entire lives unless they do the work of transformation. On the other hand, if you elevate your child into a state of superiority, we say you are falsely empowering them. If

disempowering actions lead to later issues of shame, false empowerment leads to issues of *grandiosity*. (Real, 2022, p. 61)

By analyzing empirical evidence related to empowering and disempowering concepts, it becomes evident that empowerment is often constructed through contrast (e.g., disempowerment vs. empowerment), the use of positive modality (e.g., can, able to, opportunity), expressions of personal agency and self-reflection, as well as an emotive and inclusive tone. Lexical fields associated with empowerment include emotion regulation, agency, cognitive reappraisal, self-trust, and resilience.

In contrast, disempowering discourse presents a more complex, psychologically nuanced portrayal, especially within trauma-informed narratives. These texts frequently employ psychotherapeutic language and emphasize how early relational experiences shape internalized power dynamics, manifesting as shame, powerlessness, or grandiosity.

Disempowering and falsely empowering expressions reinforce a cognitive-emotional continuum—from feelings of inadequacy and shame to distorted self-perceptions such as grandiosity and superiority. Both ends of this spectrum deviate from authentic psychological empowerment. This is particularly evident in family-based discourse, where early relational dynamics form emotional scripts that persist unless restructured through empowering re-narration.

Thus, media discourse serves both descriptive and therapeutic functions: it reflects internalized narratives and encourages readers to reconceptualize trauma and reframe their inner dialogues. This supports the central argument that media can function as a vehicle for psychological empowerment and emotional restructuring.

5. Conclusion

This study has examined empowering and disempowering concepts as linguistically and cognitively constructed within contemporary English media discourse, employing a multidisciplinary framework grounded in cognitive semiotics, discourse analysis, and lexicographic comparison. The analysis revealed intricate semantic and pragmatic mechanisms through which media narratives shape individuals' perceptions of agency, self-worth, and emotional resilience. Empowering discourse predominantly employs lexical and syntactic strategies that emphasize personal agency, positive transformation, and cognitive reappraisal, inspiring hope and framing emotional struggles as opportunities for growth. In contrast, disempowering discourse evokes themes of helplessness, shame, and psychological depletion through emotionally charged lexical fields that construct mental models of internalized defeat and loss of control. The study also highlighted the phenomenon of false empowerment, especially within trauma-informed narratives, which complicates this binary by exposing distortions fostering grandiosity rather than genuine agency.

Furthermore, the findings underscore the significant role of extralinguistic cues and situational contexts in enriching the semiotic complexity of empowerment and disempowerment. Media discourse thus functions not merely as a reflection of social realities but as an active constructor of psychological and cultural identities, reinforcing or challenging existing power relations. In light of evolving media platforms and their increasing interactivity, this research advocates for continued critical and cognitive-semiotic inquiry to deepen our understanding of how language and multimodal texts shape collective and individual experiences of empowerment in diverse sociocultural settings. Ultimately, this study confirms media discourse as a vital psychological and cultural tool capable of fostering resilience and

emotional well-being, particularly within family and self-development narratives, while opening pathways for future empirical exploration of media language's therapeutic and transformative potentials in digital and transmedia environments.

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Manipulation of Religious Discourse in Crisis-ridden Contexts: The Case of Netanyahu's Post-October 7 Speeches

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Abstract

This study explores the deliberate and strategic use of religious discourse by Israeli Prime Minister Benjamin Netanyahu in the immediate aftermath of the October 7, 2023 operation. Employing the methodological framework of Critical Discourse Analysis (CDA), the chapter reveals the ways in which Netanyahu integrated religious metaphors, biblical allusions, and high-modality language to construct a narrative that frames the Israeli-Palestinian conflict within a framework of existential struggle and moral absolutism. By analyzing a selection of speeches and official communications delivered between October 7 and October 15, this research shows how appeals to divine authority and sacred history function to legitimize military responses, shape collective identity, and influence both domestic and international perceptions. The findings suggest that in moments of crisis, religious rhetoric can be a powerful discursive tool to consolidate national unity, justify political decisions, and suppress dissent. Nonetheless, such rhetoric carries serious risks, as it strengthens binary oppositions and deepens existing sociopolitical fractures, thereby obstructing pathways to dialogue and conflict resolution. This study, therefore, positions itself within debates on the nexus between religion, language, and power in contemporary political crises. It interrogates the ways in which religious appeals have long been instrumentalized to legitimize projects of imperialism, colonial domination, and even genocidal violence.

Keywords: religious discourse, religious rhetoric, Critical Discourse Analysis, Israeli-Palestinian conflict, domestic and international perceptions

1. Introduction

In times of crisis, political discourse often undergoes transformation, becoming more symbolic, emotional, and ideologically charged. Among the most potent rhetorical resources available to political leaders is religious language. Embedded with centuries of cultural, moral, and spiritual significance, religious discourse allows political actors to elevate hegemonic issues to a realm of sacred meaning. Through such language, conflicts are reframed as divine missions, adversaries become embodiments of evil, and national suffering is interpreted as part of a sacred destiny (Appleby, 2003; Juergensmeyer, 2017). This sacralization of political discourse serves both to assert the legitimacy of genocidal actions and to narrow public discourse by presenting political choices as moral imperatives. In this context, religious rhetoric functions as a mechanism of manipulation and control, particularly when deployed in the heat of conflict.

Religious discourse has played a particularly prominent role in the Middle East, where national, ethnic, and religious identities are deeply intertwined. The Israeli-Palestinian conflict exemplifies this dynamic, because it is not only a territorial and political struggle but also a

deeply symbolic contest over history, identity, and legitimacy (Brubaker, 2015; Haynes, 2014). In such a conflict, appeals to religious authority often transcend spiritual considerations and become tools for constructing in-group solidarity and dehumanizing the "other." Political leaders on both sides have historically invoked religious themes to frame their actions and gain support, both domestically and internationally.

On October 7, 2023, the long-standing conflict between Israel and Hamas escalated dramatically. A surprise operation by Hamas on Israeli Gaza-border kibbutzim marked the beginning of a renewed and intense wave of violence, prompting a swift and forceful response by the Israeli government. In the days that followed, Israeli Prime Minister Benjamin Netanyahu addressed the nation and the world in a series of speeches aimed at justifying military action, calming national fears, and shaping international opinion. What distinguished these speeches, however, was not merely their political urgency, but their theological framing. Netanyahu repeatedly invoked biblical narratives, divine promises, and spiritual imagery, positioning Israel not only as a sovereign state under attack but as a chosen nation engaged in a sacred battle between good and evil (Peters, 2007).

This rhetorical shift toward religious discourse raises critical questions about the use and function of sacred language in political communication. Netanyahu's speeches serve as a case of what can be described as "discourse crisis management", the process by which leaders reframe emergencies using deeply resonant language to solidify support and silence dissent (Fairclough, 2013; Wodak, 2015). Religious rhetoric in this context serves multiple strategic purposes: it legitimizes military escalation by placing it in a moral frame; it evokes collective memory and identity to unify a fragmented public; and it positions Israel's actions as beyond reproach by grounding them in divine mandate.

The strategic utilization of religious discourse during crises is not a novel phenomenon, but its intensity and political implications in the digital age call for scholarly attention. In an era marked by global media saturation, social fragmentation, and ideological polarization, religious rhetoric has become a powerful tool for shaping public narratives. When political leaders speak in religious terms, their words are attentively detected. They resound through media networks, social platforms, and international commentary, multiplying their discursive power and ideological reach (Van Dijk, 2006; Zienkowski & Breeze, 2019).

This chapter carries out a critical examination of Netanyahu's speeches from October 7 to October 15, 2023, employing Critical Discourse Analysis (CDA) as its principal methodological framework. Hence, CDA seeks to uncover how language operates within systems of power and ideology (Fairclough, 1995; Wodak & Meyer, 2016). Rather than treating Netanyahu's speeches as isolated textual artifacts, the analysis considers them as part of a broader discursive formation in which language, power, and belief intersect. Specifically, this study examines how religious tropes are used to (1) construct a morally dichotomous view of the conflict, (2) position Israel as morally superior and divinely justified, and (3) delegitimize both internal dissent and international criticism.

The chapter is structured as follows. First, it reviews relevant literature on the role of religious language in political discourse, with particular emphasis on its manipulative and legitimizing functions during crises. Second, it outlines the theoretical and methodological underpinnings of CDA as applied in this study. Third, it presents a detailed analysis of Netanyahu's speeches, identifying recurring discursive patterns and rhetorical strategies. Finally, the study reflects on the broader implications of these findings for understanding the

role of religion in contemporary political communication, particularly in conflict-ridden contexts

2. Literature Review

The relationship between the nation-state and religion has long occupied scholars of nationalism, producing diverse interpretations that range from viewing religion as a pre-modern form eclipsed by secular nationalism to recognizing it as a persistent and dynamic force in modern politics. Classical theorists such as Renan (1882) conceptualized the nation as a “daily plebiscite” grounded in shared memory and consent, a vision in which religious traditions could play a unifying role. Modernist accounts, notably Gellner’s (1983) link between nationalism and industrialization and Anderson’s (1983) portrayal of nations as “imagined communities,” often downplay religion’s ongoing significance, focusing instead on structural transformations like mass education, language standardization, and print capitalism.

The intersection of religion and politics has long been a fertile area of academic inquiry, especially in contexts marked by crisis and conflict. Religious discourse, when mobilized by political leaders, serves as a cultural maker as well as a strategic linguistic instrument that shapes collective memory, national identity, and public morality (Gangopadhyay, 2023). The purpose of this literature review is to survey the existing academic landscape on the use of religious language in political discourse, with particular attention to its role in crises, its function within nationalist and populist ideologies, and its broader implications in media and public reception. This synthesis is meant to lay the foundation for understanding how Israeli Prime Minister Benjamin Netanyahu’s post-October 7, 2023 speeches abide by and also intensify established discursive traditions.

2.1 Religion as Political Rhetoric: Historical and Theoretical Foundations

Scholars have long recognized the persuasive power of religious language in the political sphere. Weber’s foundational work (1978) positioned religion as a highly effective legitimizing force in the development of authority, particularly charismatic leadership. Religious language, in this sense, does not merely communicate faith but asserts moral authority, sacralizes political decisions, and constructs narratives of destiny and divine mission. In contemporary political discourse, this sacralizing function is often used to lift up state action from the sphere of policy into the realm of divine necessity.

Appleby (2000) explored how religion, while often appears as a peacemaker, can just as easily become a tool for violence. When religion is linked to political grievances or historical trauma, it tends to operate in absolutist terms like good versus evil, sacred versus irrereligious, and friend versus enemy. In crisis settings, such as wars or terrorist attacks, this binary framing is particularly powerful. It provides a sense of clarity and purpose to citizens while delegitimizing alternative narratives or ethical questioning.

2.2. Religious Discourse and National Identity Construction

Religion and nationalism are extremely interrelated in many state ideologies, particularly in societies that claim historical or divine rights to territory. As Anderson (2020) argued in his seminal concept of imagined communities, national identity is sustained through shared myths, symbols, and languages. In religious nations, these symbols are often drawn from sacred texts, rituals, and divine narratives. For Israel, the intersection of religion and nationalism is profoundly fixed in both the history of Jewish people and the theological notion of divine chosenness.

Gershon (2011) observed that modern Israeli political discourse often swings between secular pragmatism and religious symbolism, with leaders appealing to biblical narratives in order to connect contemporary struggles with ancient Jewish history. This rhetoric becomes especially prominent in times of perceived existential threat. When Netanyahu speaks of “Am Yisrael Chai” (the people of Israel live), or calls upon “the God of Israel,” he is not merely performing cultural heritage; he is activating an emotionally and theologically charged collective identity (Haynes, 2014). This use of religious discourse is not limited to Israel. Across various conflict zones, political leaders rely on religion to stir up loyalty and frame adversaries as moral enemies. Juergensmeyer (2017) noted that religious nationalism often converts political struggles into “cosmic wars,” where the stakes are framed as ultimate: salvation or damnation, survival or annihilation.

2.3 Discourse and Crisis

De Rycker and Mohd Don (2013) frame crisis as a socially and discursively constructed phenomenon, shaped through language, institutional power, and ideological maneuvers rather than existing as an objective reality. This perspective aligns closely with Wodak’s (2015) notion of the “politics of fear,” whereby political leaders, in times of uncertainty, mobilize religious and cultural symbols to reinforce in-group cohesion and define the out-group. Netanyahu’s post-October 7 speeches exemplify this dynamic, as he draws on biblical imagery and invokes divine protection to position the conflict as an existential, almost eschatological struggle between a “civilized” self and a barbaric, terroristic other. In doing so, his discourse not only frames the crisis in sacred moral terms but also legitimizes state actions as divinely sanctioned, thereby transforming a geopolitical conflict into a sacred contest. This case vividly illustrates the volume’s core claim that crisis narratives do not merely respond to events but actively construct them, using symbolic resources to legitimize responses, consolidate power, and reinforce exclusionary identities.

Fairclough (2013) put forth that language in crisis contexts turns to be a means of ideological struggle. Discourses are not passive reflections of events; they actively shape how those events are perceived and responded to. Describing an attack as an “act of evil” rather than a “military operation”, for instance, has serious repercussions in relation to public perception, moral responsibility, and international diplomacy.

2.4. Critical Discourse Analysis and Religious Ideology

The methodological approach of CDA suggests the main tools for deconstructing the ideological principles of religious-political speech. Fairclough (1995) considered CDA as a three-dimensional model including textual analysis, discursive practice, and social practice. This framework allows researchers to explore how and why certain representations dominate. When applied to religious discourse, CDA reveals how power operates through sacralized language.

Van Dijk (2006) added that manipulation in political discourse often occurs through presuppositions, metaphors, and lexical choices that encode ideology without appearing overtly political. The use of biblical metaphors like “shield of David” or “light unto the nations,” for instance, situates Israeli action within a divinely sanctioned narrative, defending it from secular critique. Netanyahu’s speeches repeatedly employ such metaphors, fusing modern geopolitical aims with sacred teleology.

Wodak and Meyer (2016) argued that CDA is particularly suited for exploring discourses that are historically situated. In Israel, the religious significance of Jerusalem, the trauma of the

Holocaust, and the legacy of Zionism all come together in a solid intertextual space where past and present, religion and politics are mutually interconnected. Analyzing these speeches through CDA shows the deep layers of ideological residue that shape and justify political action.

2.5 Religious Nationalism and Populist Discourse

A growing body of literature has begun to explore the intersection between religious nationalism and populist rhetoric. Brubaker (2015) defines religious nationalism as the embedding of sacred authority within the framework of national identity, often mobilized against perceived internal and external threats. In such contexts, the leader assumes both roles of a political representative and of a spiritual guide or a protector of the national identity.

Zienkowski and Breeze (2019) further identify that populist leaders often construct “imagined communities” through mythic storytelling, binary oppositions, and the sacralization of the people’s will. In Netanyahu’s discourse, the Israeli public is frequently portrayed as a divinely chosen collective under siege from an evil other. The October 7 events, therefore, are not framed simply as acts of terrorism, but as existential and spiritual attacks on the people of Israel.

This populist-religious framing enables two key discursive maneuvers: first, it consolidates political legitimacy by presenting the leader as divinely appointed; second, it delegitimizes dissent or negotiation by framing opposition as heretical or traitorous. Such narratives, once embedded in the public sphere, contribute to the erosion of democratic debate and the justification of exceptionalist state violence.

2.6 Global Media, Discourse Circulation, and Reception

In the contemporary media landscape, political and religious rhetoric does not remain confined to national borders. As Van Dijk (2006) points out, the media play a pivotal role in the reproduction of ideology by selecting, framing, and amplifying political discourse. Netanyahu’s speeches, while initially directed at domestic and diasporic Jewish audiences, were quickly disseminated globally through international news networks, social media platforms, and political comments. The global reception of religious–political discourse is mediated by cultural, political, and ideological filters. While Israeli audiences may interpret references to “the God of Israel” as affirmations of identity and resilience, international observers—particularly those critical of Israeli policy—may perceive such language as theocratic and provocative. Liebes (2023) notes that religious imagery in Israeli communication is often interpreted divergently across audiences, producing complex and sometimes contradictory receptions. Furthermore, digital media have democratized the production and circulation of counter-discourses. Civil society actors, religious leaders, and political activists now use online platforms to contest official narratives, generating a dynamic interplay between hegemonic and counter-hegemonic discourses competing for legitimacy in the global information arena. Consequently, a comprehensive analysis of religious–political discourse necessitates examining not only how it is produced but also how it is perceived, contested, and resisted across multiple sociopolitical contexts. Within the structure of this literature review, these dynamics can be addressed through two interrelated focal areas: (1) the relationship between nation-building, the state, and religion, and (2) CDA approaches to the functions and ideologies served by religious discourse in both “normal” political communication and crisis-driven settings, with particular attention to the Israeli–Palestinian conflict.

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3. Methodology

This study employs CDA approach informed by Fairclough’s (1992, 2001) three interrelated models, description (text analysis), interpretation (discursive practice), and explanation (social practice) approach, which emphasizes the interplay between discourse and other social elements in shaping and being shaped by power relations. To complement this, the analysis also draws upon Entman’s (1993) Framing Theory, which examines how communicators select certain aspects of perceived reality and make them more salient in a text to promote particular problem definitions, causal interpretations, moral evaluations, and treatment recommendations. The connection between Fairclough’s models and framing lies in their mutual concern with the *selection and organization of meaning* in discourse: while Fairclough’s CDA interrogates how linguistic choices are embedded in and reproduce social power structures, framing theory elucidates how these choices direct audience attention toward specific interpretations and away from others. In this study, the integration of CDA and framing theory creates a comprehensive methodological framework for investigating how Israeli Prime Minister Benjamin Netanyahu’s post–October 7, 2023 speeches deploy religious language to construct narratives of divine protection, frame the conflict as a moral struggle between civilization and barbarism, justify military actions, and reinforce nationalist–religious ideologies. Fairclough’s text–discourse–society analysis is employed to unpack the linguistic, intertextual, and ideological features of Netanyahu’s speeches, while Entman’s framing categories are applied to identify how religious references operate as framing devices that shape public perception, limit alternative interpretations, and legitimize particular policy responses.

3.1 Theoretical Framework

3.1.1 Framing Theory

Entman’s Framing Theory stipulates that media and political actors frame issues in a way that shapes the audience’s interpretation of events and issues. According to Entman (1993), framing involves selecting certain aspects of a perceived reality, making them more salient in a communicating text to promote a particular interpretation, judgment, or solution. Framing is a process that highlights certain elements while obscuring others, thus guiding the audience’s understanding of the issue at hand.

In the context of Netanyahu's speeches, framing is particularly relevant because his use of religious discourse functions to construct a specific narrative of the conflict. Netanyahu selectively emphasizes biblical references, divine justifications, and religious metaphors to shape the audience's understanding of the conflict as not just a political struggle, but a moral and divine imperative. According to Entman (1993), to frame is to select some aspects of a perceived reality and make them more salient in a communicating text, in such a way as to promote a particular problem definition, causal interpretation, moral evaluation, and/or treatment recommendation for the item described. Therefore, the analysis applies Entman's framing theory to investigate how Netanyahu's speeches define the conflict, diagnose its causes, make moral judgments, and propose solutions.

3.1.2. Critical Discourse Analysis

In this study, Fairclough's (1992, 2001) three interrelated models, description (text analysis), interpretation (discursive practice), and explanation (social practice) approach helps to decipher how the frames in Netanyahu's speeches interact with the broader social factors to shape public opinion. Netanyahu's use of religious discourse is analyzed not only as a political tool but also as a form of ideological communication that draws on deeply seated religious and national symbols to create a sense of shared identity and purpose.

3.2. Data Collection and Selection

The data for this study consists of Netanyahu's public speeches between October 7 and October 15, 2023, delivered in response to the Hamas operation. These speeches are selected because they are significant both in terms of their immediate impact on public opinion and in their religious framing. As a high-profile political figure, Netanyahu's speeches have a broad audience, both domestically in Israel and internationally.

The selected speeches were transcribed and analyzed in their entirety, focusing particularly on passages where Netanyahu invoked religious language, biblical references, or moral judgment. The speeches are also analyzed for the rhetorical structures and metaphors used to frame the situation, with an emphasis on how religious elements are used to construct a sense of moral legitimacy and divine justification for military action.

Table 1

A selection of Netanyahu's post-October 7 speeches

Speech ID	Date of Delivery	Occasion	Speech Title	Expert
S1	07/08/2023	Emergency national address	Battle between Light and darkness	"Israel is engaged in a battle between the forces of light and the forces of darkness. Like David before Goliath, we shall stand firm, for this is a war for our very survival."
S2	07/08/2023	Excerpt from initial declaration of war	Like David before Goliath	"Like David before Goliath, we shall stand firm... this is a war for our very survival."
S3	October 8, 2023	Press Conference with cabinet and military leaders	God stands with Israel	"God stands with Israel in this holy war. We must cleanse our land of this evil, just as our ancestors did before us."

3.3. Data Analysis

The speeches are analyzed using qualitative content analysis, with a particular focus on identifying recurring religious themes and metaphors. Each speech is examined for religious references and metaphors. These include biblical stories, divine mandates, and the moral superiority of Israel. The analysis identifies how specific frames are constructed and communicated, such as the portrayal of Hamas as evil and Israel as morally righteous. Also, the moral judgments are used, including explicit and implicit judgments about right and wrong, justice, and legitimacy. Then, there is deployment of emotional appeal, including the use of fear, pride, and solidarity to engage the audience emotionally.

5. Analysis and Discussion

4.1. Framing Analysis

Netanyahu's framing of the conflict begins with a religious-nationalist definition that positions Israel's struggle as a *divinely ordained mission*. His frequent invocation of the phrase "the forces of light and the forces of darkness" and references to "*divine protection*" function as a central frame in his speeches. His framing of the conflict as a sacred war serves to create a *divine mandate* for Israel's military actions.

This frame of *religious nationalism* is particularly significant in the context of Netanyahu's speeches because it deals with deeply rooted historical and religious narratives that define Israeli national identity. Hence, Netanyahu often draws parallels between Israel's present struggle and the *biblical through the narrative* of David before Goliath. He describes the Jewish people as eternally oppressed but destined for *divine salvation*. This framing emphasizes Israel's *right to self-defense* as not just a political but a *moral and spiritual necessity*.

When framing the conflict as an existential battle between the forces of good and evil, Netanyahu ensures that the public views Israel's actions as part of a sacred mission. His repeated references to *God's will* serve to legitimize military responses, portraying them as morally endorsed and divinely guided. This frame resonates particularly well with audiences that share these religious convictions, such as Israeli Jews, Christian Zionists, and other religiously motivated supporters. In this line, this table highlights Netanyahu *Discursive Framing of Hamas*.

Table 2

Discursive Framing of Hamas in Netanyahu's Post-October 7 Speeches

Framing Element	Description	Function in Discourse	Effect on Audience
Terminology Used	"Barbarism," "inhuman," "savage," "evil"	Dehumanizes Hamas; constructs them as morally illegitimate	Justifies extreme responses; reduces empathy or nuance toward the other side
Moral Polarization	Hamas = Evil / Israel = Good	Creates a binary moral universe; simplifies the complexity of the conflict	Facilitates moral clarity and emotional mobilization
Historical Allusions	Indirect references to Holocaust, Jewish trauma	Links current threat to past existential dangers faced by Jews	Activates collective memory; positions Israel

			as perpetually under existential threat
Crisis Diagnosis	Cause of conflict = Hamas's inherent barbarity	Frames the root cause as moral depravity rather than political or territorial dynamics	Shifts blame entirely onto the enemy; forecloses diplomatic or structural analysis
Call to Action	Israeli military response as a moral imperative	Justifies military operations as ethical and necessary	Mobilizes domestic and international support; suppresses dissent

Table 2 illustrates how Netanyahu's post-October 7 speeches employ strategic discursive framing to construct a morally charged and emotionally rich narrative about Hamas. Through terms like "barbarism," "inhuman," and "evil," Hamas is dehumanized and labeled as a fundamentally illegitimate actor, thereby justifying extreme military actions and discouraging empathy. This framing is reinforced by harsh moral polarization depicting Hamas as evil and Israel as good which simplifies the conflict into a binary struggle, making it easier to mobilize public sentiment. Historical allusions, particularly references to the Holocaust and Jewish trauma, call upon collective memory and portray Israel as continuously under existential threat, intensifying the perceived urgency of its actions. The root cause of the conflict is framed not in political or territorial terms, but as the result of Hamas's inherent barbarity. Henceforth, this will shift responsibility away from Israeli policies and eliminate alternative interpretations. Finally, calls for military action are presented as a moral obligation, legitimizing violence as ethically necessary and silencing potential criticism at home and abroad.

4.1.1 Diagnosing the Causes: Evil and Barbarism

Netanyahu's framing involves the diagnosis of the conflict's causes, particularly the portrayal of Hamas as an *inherently evil force*. Netanyahu's speeches repeatedly use terms like "*barbarism*", "*inhuman*", and "*savage*" to describe the actions of Hamas. This dehumanization of the enemy serves a dual function: it defines Hamas as morally illegitimate and makes Israel's military appear as the only morally acceptable response.

In line with Entman's framing theory, this portrayal of Hamas as an evil force serves to simplify the conflict into a *binary moral framework*, where Israel represents righteousness and Hamas represents evil. This framing makes it easier for Netanyahu to bring together both domestic and international support for military action, as it frames the conflict as not just a political or territorial conflict but a *battle between good and evil*. In Netanyahu's rhetoric, Hamas is described as a real menace to *Jewish survival*.

4.1.2 Proposing Solutions: Divine Justice and Military Retaliation

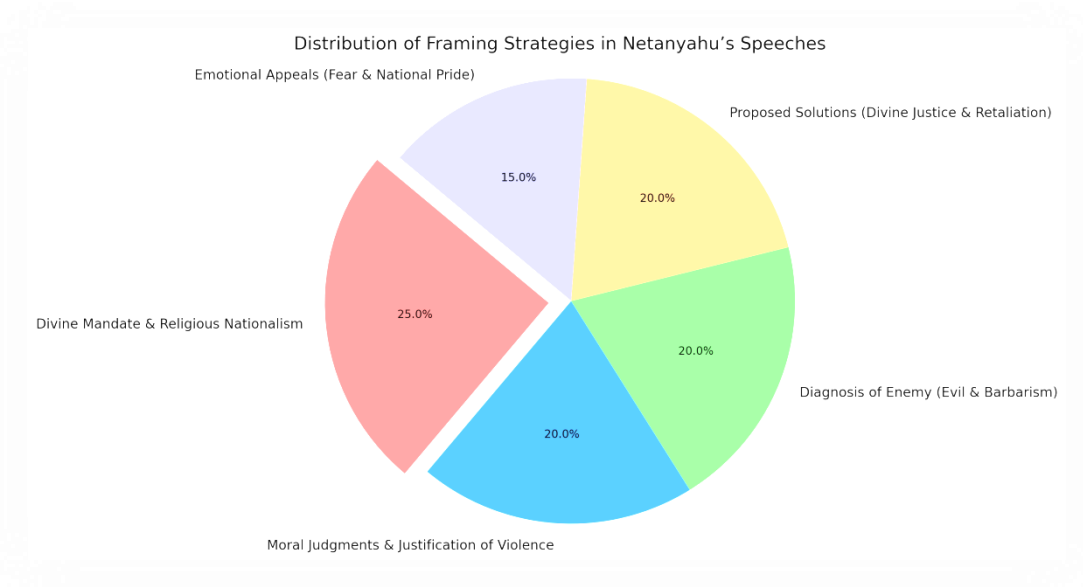
Netanyahu's religious rhetoric also serves to prescribe a solution to the conflict, particularly through the framing of *military retaliation as a divinely justified action*. In several speeches, Netanyahu states *divine justice* as the underlying justification for Israel's military operations. Phrases such as "war for our very survival" and references to Israel as "*God's chosen people*" create a framework in which Israel's actions are not merely political decisions, but part of a *larger divine plan*.

The *moral prescription* embedded in Netanyahu's speeches suggests that military revenge is not only necessary but virtuous. The *divine mandate* to protect the land of Israel and its people is framed as a *sacred duty*, one that goes beyond political or diplomatic concerns. This rhetoric

is aimed at uniting the Israeli public under a shared belief that their military actions are predetermined and blessed.

Moreover, Netanyahu's speeches emphasize the need for *revenge* against Hamas. The frame of *divine retribution* echoes biblical narratives where divine justice is meted out against enemies of Israel. Apart from strengthening the legitimacy of Israel's military response, this religious framing discourages any form of *criticism* or dissent. From the Israeli PM's perspective within this frame, to oppose Israel's actions is to oppose God's will.

Figure 1
Framing Strategies in Netanyahu Speech



As it is shown in the diagram, the divine mandate and religious nationalism is the framing strategy most used by Netanyahu. This means that the Israeli PM plays on two highly stimulating strands: religion and nationalism. Hence, the Israeli audience would feel that the war is a religious and nationalist duty and service.

4.1.3 Moral Judgments: Justifying Violence and Defense

Netanyahu's religious rhetoric is charged with *moral judgments*, particularly about the legitimacy of Israel's military actions. The speeches repeatedly frame Israel's military operations as *just and necessary*, and makes use of the language of *self-defense* and *righteous war*. By invoking divine authority and biblical mandates, Netanyahu introduces Israel as the *defender of peace* and its military as a *moral force*.

The moral judgment inherent in this rhetoric helps to *demonize Hamas* and its supporters, portraying them not only as political enemies but as *morally corrupt* and deserving of punishment. Netanyahu frequently contrasts Israel's *moral superiority* with the *barbarism* of Hamas, suggesting that while Israel is forced to take violent actions in self-defense, these actions are justified because they are part of a larger divine and moral framework. This *moral judgment* also functions to *delegitimize any alternative narratives* or calls for diplomacy. By framing the conflict as a *cosmic struggle between good and evil*, Netanyahu ensures that his rhetoric leaves little room for compromise. The public, especially Israeli citizens, are

encouraged to see military retaliation as the only acceptable response to Hamas's actions, reinforcing support for the ongoing military operations.

4.1.5 Emotional Appeal: Engaging National Pride and Fear

A key feature of Netanyahu's religious rhetoric is its *emotional appeal*. Netanyahu's speeches are designed to evoke feelings of *fear*, *anger*, and *pride* among Israeli citizens and supporters of Israel worldwide. The emotional appeal to *national pride* is particularly evident in Netanyahu's references to the "*Promised Land*" and the "*Holy City of Jerusalem*". Through invoking these sacred symbols, Netanyahu strengthens the *sense of collective identity* among Israeli Jews and reinforces the idea that their struggle is not just for survival but also for the protection of *holy spaces* and *sacred values*. At the same time, Netanyahu appeals to *fear* by emphasizing the *existential threat* posed by Hamas. The fear of annihilation or *another Holocaust* is a powerful emotional driver, particularly in the wake of the 2023 attacks. This fear is skillfully manipulated to justify military escalation and to frame Israel's actions as a *necessary response* to an impending existential threat.

4.2 Critical Discourse Analysis

This section applies Fairclough Critical Discourse Analysis (CDA) to decipher the religious rhetoric employed by Israeli Prime Minister Benjamin Netanyahu in his speeches from October 7 to October 15, 2023, in response to the Hamas operation. Through CDA, this study explores the ways in which Netanyahu utilizes religious discourse to construct and reinforce political ideologies, to justify military action, and to manipulate public perception. The analysis is structured around the three main levels of CDA: textual analysis, discursive practice, and social practice (Fairclough, 1995).

4.2.1 Textual Analysis: Identifying Religious Rhetoric

At the most basic level of analysis, Netanyahu's speeches are rich with religious symbols and references. They bring into play Jewish religious traditions, biblical imagery, and divine justification for military action. In this vein, Netanyahu utilizes a variety of metaphors and analogies that carry powerful religious undertones. Metaphors, in particular, are often used to frame the conflict in terms of a *cosmic struggle between good and evil*, in which Israel is positioned as the embodiment of light, justice, and righteousness, and Hamas as the representation of darkness, barbarism, and evil.

Obviously, Netanyahu might frame Israel's military actions as "a battle between light and darkness" or as "the forces of good versus the forces of evil." These types of metaphors are frequently seen in speeches of political leaders during times of crisis, as they aim to create a *moral dichotomy* that simplifies complex conflicts and encourages public support for the state's actions. Besides, pronouns serve a powerful role in constructing the '*us*' vs. '*them*' dichotomy. Netanyahu's speeches often emphasize unity within the Israeli nation and contrast this with the enemy (Hamas), which is depicted as '*other*' and inhuman. This *strategic use of pronouns* helps create a *sense of in-group solidarity* and a *clear demarcation* between Israelis, who are presented as virtuous, and the Palestinians, who are often depicted as barbaric or fanatical.

Netanyahu frequently uses the pronoun '*we*' to refer to the Israeli people or the Israeli state, emphasizing collective strength, righteousness, and shared values. He contrasts this with the use of the pronoun '*they*' to describe the Palestinians or Hamas, dehumanizing them and portraying them as the enemy. The use of '*we*' can evoke a sense of national unity, while '*they*'

serves to ‘otherize’ the opponent, making the conflict seem more like a clash between two fundamentally different worlds. Hence, the *inclusive* ‘we’ also functions to generate a sense of moral superiority. By framing the Israeli public and leadership as *one unified force*, Netanyahu strengthens the image of Israel as a just state acting on behalf of the common good.

Netanyahu’s speeches also rely heavily on the *modality of certainty and necessity* to assert the legitimacy of Israel’s military actions. The use of modal verbs such as “must,” “will,” “have to,” and “shall” convey a sense of *moral obligation* and *inevitability* in Israel’s response to the attacks. In one speech, Netanyahu may state, “We must defend the sanctity of our nation,” or “It is our divine right to protect the land of Israel.” Such statements invoke *high modality*, signaling that the actions Israel is taking are not only politically justified but are an unavoidable necessity tied to the survival and divine mission of the state.

This rhetorical device works to present Israel’s military actions as a *moral imperative*, positioning them as the only reasonable and just course of action in the face of an existential threat. Netanyahu’s speeches often follow a *narrative structure* that mirrors religious storytelling, where he portrays Israel’s current struggle as a continuation of historical battles that go back to biblical times. This narrative structure aids in legitimizing current actions by framing them as part of a larger, divine plan.

Netanyahu refers to the Holocaust or the ancient Jewish exile to emphasize the moral stakes of the conflict. By positioning the present moment as a pivotal episode in the long history of the Jewish people, he underscores the idea that Israel’s survival is not merely a political matter but a *sacred calling*. In addition to explicit references to God, Netanyahu employs *biblical metaphors* to cast the conflict in terms of ancient narratives. He frequently references the idea of Israel as the “*chosen people*,” a divine inheritance that must be defended at all costs. This is not merely a religious statement but a political one, asserting the legitimacy of Israel’s existence and territorial claims through a theological lens.

Another powerful device used in the speeches is the metaphor of the “*light unto the nations*,” which originates from the Book of Isaiah. This phrase is often used in Zionist rhetoric to describe Israel’s moral role in the world. Netanyahu adapts this metaphor to suggest that Israel’s actions, even in times of war, are part of a broader divine mission, thus framing military strikes and retaliation as morally justifiable. By invoking these religious tropes, Netanyahu seeks to provide his actions with an air of inevitability and righteousness.

Table 3

Religious Rhetorical Strategies in Netanyahu’s Speeches

Rhetorical Device	Description	Religious Connotation	Intended Effect
Metaphors & Analogies	Framing conflict as “light vs. darkness” or “good vs. evil”	Biblical and eschatological imagery	Creates moral clarity; frames Israel as righteous
Pronoun Usage	Strategic use of “we” (Israel) vs. “they” (Hamas/Palestinians)	Reinforces collective identity and othering	Builds unity and dehumanizes the enemy
Modality	Use of modal verbs like “must,” “shall,” “have to”	Evokes divine command or moral obligation	Justifies military action as necessary and non-negotiable

4.2.2 Discursive Practice: Framing and Audience Engagement

At the level of discursive practice, Netanyahu's speeches reflect a careful strategy of audience targeting and emotional manipulation. His primary audience includes not only domestic Israeli citizens but also international Jewish communities and global sympathizers. The speeches aim to unite these groups in a collective religious-national identity, drawing on shared religious symbols to foster a sense of solidarity and purpose.

The framing of the conflict as a *cosmic struggle between good and evil* is a key strategy in Netanyahu's rhetoric. He positions the Hamas militants not just as political adversaries but as *forces of darkness* or even evil incarnate. By invoking biblical imagery, Netanyahu frames the Israeli-Palestinian conflict as a continuation of an age-old battle between the righteous people of Israel and malevolent forces. This dichotomous framing leaves little room for moral ambiguity and constructs the war as a moral imperative.

A striking example of this is Netanyahu's consistent use of the term '*barbarism*' to describe Hamas's actions, which serves to dehumanize the opposition and render them morally illegitimate. The use of terms like 'brutal,' 'inhuman,' and 'savage' in reference to Hamas is designed to draw a clear line between the Israeli military, portrayed as a divinely appointed defender of peace, and the enemy, which is depicted as a barbaric force of destruction. This dualistic framing is reinforced with the repeated invocation of "*divine justice*," suggesting that Israel's military actions are a necessary response to the "evil" unleashed by Hamas. At the same time, Netanyahu employs religious appeals to consolidate *domestic unity*. By framing Israel's fight as not only a military one but also a *spiritual and existential struggle*, Netanyahu aims to rally national support and moral backing for military escalation. Religious language provides a powerful tool for solidifying national identity, particularly among Israeli Jews, by invoking sacred concepts like "*the Promised Land*" and the "*Holy City of Jerusalem*."

4.2.3 Social Practice: Ideological Construction and Legitimization

The third level of CDA focuses on the broader social practices that are reinforced by the religious discourse in Netanyahu's speeches. At the heart of this analysis is the question of how religious language serves to *legitimize political action* and shape national consciousness. Netanyahu's speeches construct an ideological narrative where the actions of the Israeli state are framed as divinely sanctioned and morally justified. This form of *religious nationalism* draws on both *historical trauma* (e.g., the Holocaust) and a *theological imperative* to legitimate military retaliation and to consolidate a sense of national unity.

By making religious narratives, Netanyahu seeks to build an unassailable moral authority for his government. In doing so, he draws upon the deeply rooted connection between religious and national identity in Israel. The speeches are not just calls for military action—they are calls to defend a sacred cause. This tactic effectively discourages dissent, framing any opposition as not only politically unpatriotic but also theologically misguided. Furthermore, the religious rhetoric helps Netanyahu appeal to *global audiences*, particularly Christian Zionists in the United States and Jewish communities worldwide. By positioning Israel as the embodiment of divine will, Netanyahu seeks to align the Israeli state with a *universal struggle for righteousness*, thereby seeking moral validation from a broader, religiously motivated global constituency.

4.2.5 Intertextuality: Linking the Present to the Past

Another key feature of Netanyahu's religious discourse is its *intertextuality*, the way in which his speeches draw connections between the contemporary situation and historical or biblical events. Netanyahu frequently makes references to past Jewish victories, such as the *David and Goliath battle*, framing Israel's present struggle as part of a long tradition of divine deliverance and triumph over adversity.

He describes the attacks of October 7 as a *modern-day enslavement* of the Jewish people, equating it to the historical oppression of the Israelites throughout history. This serves to frame the conflict not just as a geopolitical issue but also as part of a larger, divinely ordained narrative of Jewish survival. In this way, Netanyahu's speeches perform a rhetorical *linking of the past and present*, creating a continuous thread of sacred history that positions the state of Israel as the heir to ancient Jewish glory. The invocation of *biblical language* such as "a mighty hand and an outstretched arm" in reference to God's protection over Israel adds a sense of *historical continuity* and divine favor. This links contemporary Israeli military action with the mythic narratives that define Jewish identity and historical experience. By doing so, Netanyahu transforms an immediate military crisis into a larger existential struggle with divine implications.

Through a detailed CDA of Netanyahu's speeches, it becomes clear that religious discourse functions not only as a tool for legitimating Israel's military actions but also as a method of shaping public perception and galvanizing national unity. By framing the conflict in religious terms, Netanyahu is able to present his actions as divinely sanctioned, thereby positioning Israel as the defender of sacred truth against the forces of evil. This discourse manipulates the political landscape by drawing on deep-seated religious and national identities, ultimately consolidating power and marginalizing dissent.

6. Conclusion

This article has critically analyzed Israeli Prime Minister Benjamin Netanyahu's speeches between October 7 and October 15, 2023, using the integrated frameworks of Critical Discourse Analysis (CDA) and Framing Theory. The findings demonstrate that religious discourse in these speeches functions not merely as expressive language but as a strategically instrumentalized rhetoric—used to legitimize political violence, reinforce national solidarity, and marginalize dissent under the guise of moral absolutism. Through repeated use of biblical references, divine election, and existential binaries, Netanyahu transformed a complex geopolitical conflict into a sacred moral war.

Such discursive framing carries far-reaching implications. It activates collective memory and trauma to cultivate emotional allegiance, justifies exceptional state practices through divine legitimation, and constrains the democratic space for critique by delegitimizing opposition as morally deviant. Henceforth, religious-nationalist populism reinforces theological narratives to naturalize state power and suppress pluralistic debate—particularly in contexts of crisis where fear and identity are prevailing.

This analysis calls for renewed scholarly attention to the intersection of religion, crisis discourse, and political legitimacy. As global political actors increasingly instrumentalize sacred language to manage crises and fortify authority, the risks of rhetorical theocratization intensify. The normalization of such discourse threatens to erode secular democratic principles,

entrench antagonistic worldviews, and perpetuate cycles of violence by foreclosing diplomatic, legal, or ethical alternatives.

Through unveiling the ideological mechanics of Netanyahu's post-October 7 rhetoric, this study contributes to broader critical conversations about language, power, and belief in contemporary political discourse. It urges scholars, journalists, and civil society actors to remain alert against the manipulation of faith for political ends and to advocate for more accountable, inclusive, and critically engaged public dialogue, especially in democratic contexts where the sacred must not eclipse the civic.

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Translation in Crisis: Navigating Competing Discourses in Media Coverage of the October 7 Attack

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Abstract

This chapter tends to explore the complex overlapping layers of both “discourse crisis” and “crisis discourse” within the media coverage of the October 7th attack in the occupied territories. The aim of the study is to show the role of translation practices in framing global public understanding and perceptions of this sensitive conflict. The research uses a qualitative methodology, combining critical discourse analysis (CDA) with insights from different translation studies. It particularly digs into the way both Arab and Western media outlets depicted the October 7th attack. Distinct linguistic and framing techniques were used to construct their respective crisis discourse approaches. The study then examines the instrumental role of translation in mediating these different narratives, drawing on theoretical frameworks that bring translation as a non-neutral act of negotiation across linguistic and cultural layers. Finally, it analyzes how the complex tensions in these mediated speeches bring a broader discourse crisis to the table, with clear conflicting interpretations. The research findings show that Arab and Western media outlets adopted principally distinct framing approaches. These approaches reveal not only distinct ideological perspectives but also opposite political angles, which significantly drew their “crisis discourses.”

Keywords: discourse crisis, crisis discourse, translation, media framing, public opinion

1. Introduction

The realm of international conflict presents a plethora of challenges for media, bearing the critical and complex responsibility of informing public understanding and making global perceptions. However, the narratives propagated are usually multi-faceted and universally problematic. The depiction of the profoundly tragic events of October 7, 2023, is a case in point. In fact, the immediate repercussions in the occupied territories, offer a compelling case study for exploring how conflicting discourses and competing translations emerge, collide, and coalesce within the extensive landscape of media coverage. This article scrutinizes the intricate interplay between two distinct yet interconnected phenomena: “discourse crisis” and “crisis discourse” throughout the translation channel. Our central objective is to meticulously unveil the profound and often understated influence of translation in mediating, and regrettably, at times exacerbating, the inherent fragmentation of public understanding during such critical events.

No doubt, the media coverage of the October 7 attack remarkably showcases a complex and problematic communicative environment. It is not unnecessary to mention that in this volatile and emotionally charged setting, information is disseminated with unprecedented speed across

disparate linguistic and cultural boundaries. Within such a charged atmosphere, translation departs from its classical and conventional role as a mere technical process of linguistic conversion. In fact, with the complexity of this overwhelmingly charged setting of the crisis, translation, naturally and consequently, transforms into a critical site of active meaning-making, complicated negotiation, and the often-subtle inscription of ideological biases. Our analysis in this research is systematically based upon three major sections, which are meticulously designed to demonstrate how specific translation versions fundamentally influence and ultimately shape global perceptions of the conflict. By dissecting the formation of “crisis discourse” in both Arab and Western media, featuring the non-neutral role of translation in mediating these narratives, and subsequently analyzing the emergence of a “discourse crisis” stemming from conflicting translations, this study endeavors to provide a comprehensive understanding of the communicative challenges inherent in reporting on highly sensitive international events.

2. Literature Review

Translation was found to be a pivotal, non-neutral process, regularly caught between these competing stories due to pragmatic lexical choices, omissions, additions, and re-contextualization, driving the audience to fragmented portrayals of the event. This fragmentation finally resulted by the end in a “discourse crisis,” where audiences were in front of conflicting translations. They found themselves facing several translations, revealing several facts, leading to several “truths”, and consequently not only eroding trust but also boosting polarization. Translation in media coverage frames public opinion during international crises. The navigation of conflicting discourses as well as translations present significant challenges, directly affecting global opinions, particularly in politically sensitive contexts. Understanding these dynamics is crucial for enhancing critical media literacy and promoting a more balanced understanding of complex geopolitical events. In the following lines, two key theoretical approaches have been adopted to help carry out this study.

2.1 Crisis Discourse (Van Dijk, 2006)

A. van Dijk’s work (2006) on crisis discourse posits that language and communication during crises are not merely descriptive but performative, serving to shape public perception, mobilize support, assign blame, and legitimize actions. His work highlights that crises are socially made through discourse. In fact, the selection of words, narratives, and communicative strategies play a significant role in defining what is perceived as a ‘crisis,’ in depicting who is responsible, and showing how it should be addressed. In this sense, discourse is not a neutral reflection of reality but an active process of meaning-making that can escalate, downplay, or reframe events depending on the communicative intent and ideological position of the speaker or institution.

Van Dijk argues that crisis discourse is particularly powerful in political and media contexts, where the urgency of a situation often demands immediate framing. Media outlets, for instance, employ lexical choices, thematic emphasis, and rhetorical strategies to highlight certain aspects of the crisis while obscuring others. This selective emphasis can invoke fear, empathy, or solidarity, while simultaneously constructing moral dimensions that delineate victims, heroes, and villains. Thus, discourse not only reports crises but also participates in their management and resolution by steering public emotions, legitimizing intervention, and delegitimizing opposition.

A central concept in Van Dijk's framework is the "ideological square"—a discursive tool that structures how groups represent themselves and others in moments of crisis. This involves four key strategies: (1) maximizing positive self-representation, (2) minimizing negative self-representation, (3) maximizing negative other-representation, and (4) minimizing positive other-representation. In crisis contexts, this mechanism becomes particularly salient, as actors seek to construct narratives that justify their actions, garner international sympathy, or delegitimize adversaries. For example, governments and media blocs may highlight their own humanitarian efforts while portraying opposing groups as aggressors or morally corrupt. Similarly, the translation in these circumstances will not be exception.

By applying Van Dijk's framework, this study critically examines how media discourse, and the translation behind, not only narrates but actively constructs crises. This includes analyzing how specific linguistic and rhetorical patterns foreground urgency, amplify moral judgments, and frame conflicts in ways that serve particular ideological or political agendas. Such an approach underscores the role of discourse as both a lens for interpreting crises and a tool for shaping collective understanding and response.

Nevertheless, while Van Dijk's model offers valuable insights into how ideology shapes crisis discourse, some scholars caution that it may overemphasize the power of discourse producers (e.g., governments or media institutions) while underplaying the agency of audiences. Reception studies suggest that audiences are not passive recipients of crisis narratives but may resist, reinterpret, or contest dominant framings. Furthermore, Van Dijk's framework is heavily focused on ideology and polarization, which can sometimes obscure other important dimensions of crisis communication, such as emotional appeal, multimodality (e.g., visuals, social media), and the role of global-local dynamics.

2.2 Non-Neutrality of Translation (Baker, 2006, 2018)

Focusing on Mona Baker's seminal contributions to translation studies, this research adopts the perspective that translation is far from being a neutral linguistic transfer. Instead, translation is seen as a deeply engaged task involving the negotiation of meaning across linguistic and cultural boundaries. Baker (2006, 2018) points to the fact that translators are not invisible mediators but active participants, whose decisions inevitably reflect ideological, cultural, and political positions. In this sense, translation is a site where power, representation, and identity are continuously negotiated.

Baker's work on shaping narratives is particularly relevant to crisis discourse. In crisis situations, translation is not simply a matter of converting information accurately but of selecting how the crisis is narrated, which voices are amplified, and which are silenced. Translators may adopt particular frames—through lexical choices, omissions, additions, and re-contextualization—that align with dominant or resistant narratives. These strategies can result in differing, sometimes conflicting, representations of the same crisis depending on the translator's socio-political context, institutional affiliations, or target audience.

Bias in translation thus becomes especially visible during crises, where competing narratives often vie for legitimacy. As Hatim and Mason (1997) note, translators' choices are never ideologically innocent, since even small shifts in modality, register, or terminology can change the evaluative force of a text. For instance, the decision to translate a group as "freedom fighters" versus "terrorists," or to highlight "civilian casualties" versus "collateral damage," does not merely involve semantics but conveys profound ideological stances (Schäffner, 2012).

Such lexical framing determines public perception, legitimizes or delegitimizes actors, and contributes to the construction of moral perspectives within the crisis narrative. In this sense, translators act as co-constructors of crisis discourse, influencing how global audiences interpret events.

This position resonates with Tymoczko (2007), who states that translation is embedded in larger narratives of power and cultural politics, and with Venuti (1995), who critiques the illusion of translator invisibility by stressing the ideological impact of translation. Connecting Baker's insights with Van Dijk's (2006) framework, we can see how translation bias overlaps with the ideological square: translators may reinforce positive self-representation of one group while highlighting the negative representation of another, which results in perpetuating ideological divides. This dynamic becomes particularly salient in media translations, where speed, institutional pressures, and political sensitivities intensify the risk of skewed representations.

Recognizing the non-neutrality of translation allows this study to interrogate translated media texts as active discursive interventions rather than transparent channels of information. By analyzing the shifts introduced through translation, the research uncovers how narratives of urgency, legitimacy, and morality are constructed and circulated across linguistic boundaries during times of crisis.

Nevertheless, while Baker's model provides valuable tools for unveiling bias, some critics suggest that it risks overstating the translator's intentionality. As Schäffner (2012) and Bielsa & Bassnett (2009) argue, translators often operate under significant institutional constraints—such as editorial policies, censorship, and time pressures—that limit their freedom to frame narratives independently. Thus, translation bias should be understood not only as the result of individual agency but also as shaped by structural forces within the media and political landscape. Acknowledging these tensions enables a more nuanced analysis of translation in crisis contexts, situating translator choices within broader networks of power, ideology, and institutional practice.

In light of these perspectives, this research approaches translated media content during crises as discursive, rather than linguistic, constructions shaped by ideology.

3. Methodology

This research examines the complex interplay between “discourse crisis” and “crisis discourse” in media coverage, with a specific focus on the October 7, 2023 attack and its immediate aftermath. The study employs a Critical Discourse Analysis (CDA) approach combined with insights from translation studies, particularly Van Dijk's framework of crisis discourse (2006) and Baker's notion of framing and non-neutrality in translation (2006, 2018). This dual lens allows for a systematic exploration of how narratives and translations are constructed, mediated, and reframed across linguistic and cultural boundaries.

3.1 Data Collection

The primary materials for this research consist of media coverage—including news reports, headlines, opinion pieces, and editorials—from both prominent Arab and Western media outlets after the October 7 events in the occupied territories. For analytical balance, the corpus draws from news agencies and broadcasters that are broadly representative of each geopolitical and cultural sphere.

The temporal scope focuses on the first three weeks following October 7, a critical period when foundational narratives were being constructed, circulated, and contested. Within this timeframe, recurrent patterns of crisis framing, lexical choices, and translation shifts were collected for analysis.

While individual outlets are not named to maintain focus on general trends, the selection covers widely circulated English-language media (e.g., Western international news agencies) and major Arabic-language broadcasters and newspapers with global reach. This ensures coverage of contrasting discursive and ideological positions.

3.2 Research Methods

The study adopts a qualitative research design grounded in Critical Discourse Analysis (CDA). Van Dijk's (2006) theory of crisis discourse provides tools for analyzing how urgency, morality, and blame are linguistically constructed through strategies such as lexical choice, thematic emphasis, and the ideological square.

In parallel, Baker's (2006, 2018) framework on translation and framing is applied to assess how meaning is negotiated across Arabic and English media contexts. This involves identifying how translation bias emerges through shifts in terminology, omissions, additions, and re-contextualization, particularly in the rendering of politically charged terms (e.g., "muqāwama" → "resistance"/"militants"/"terrorists"). The combination of CDA and translation studies allows for a multi-layered analysis that situates translation as an active discursive process within the broader crisis narrative.

3.3 Data Analysis

The analysis proceeded through a systematic examination of translated media texts to uncover how crisis narratives were mediated across Arabic and English. The process began with a close reading of selected news reports, headlines, and opinion pieces to identify recurrent lexical patterns and framing devices in both the source and target texts. Particular attention was given to points where translation introduced shifts—such as the omission or addition of culturally charged terms, the softening or intensification of evaluative language, and the re-contextualization of events within pragmatic frames. These instances were coded and compared to trace how translation practices influenced the representation of October 7 attacks, either reinforcing dominant ideological positions or creating alternative readings. The analysis was informed by critical discourse analysis but foregrounded translation as the mediating practice, allowing for an exploration of how translators' choices actively shaped crisis discourse rather than neutrally transmitting it. Through this process, the study sought to highlight patterns of bias, asymmetry, and reframing that emerge when crisis events are translated and circulated across different media and cultural contexts.

4. Findings and Discussion

The analytical process in this research involved several stages.

4.1 Comparative Framing Analysis

Our analysis began with a comparison of initial reports from both Arab and Western media following October 7. It quickly became evident that dominant frames emerged, each with distinct underlying ideologies.

4.1.1 Western Media Framing

Predominantly, Western media outlets framed the events as a "terrorist attack" (هجوم إرهابي *Hujoom Irhābī*) by Hamas, often showing the image of brutality against civilians, including women and children. News usually referred to terms such as "massacre", "atrocities", and "unprovoked attack." The narrative often stressed the "self-defense" right of Israel and aimed to sympathize with Israeli victims. To illustrate, we take this headline from a western channel: "Hamas Terrorists Massacre Israelis in Brutal Cross-Border Attack." This headline appears to be highly biased since it uses emotionally charged language like 'massacre' and labels one side as 'terrorists' without giving evidence, or depicting the broader conflict or casualties on both sides. Balanced reporting should not refer to inflammatory language. On the contrary, it should strive for neutrality, especially in such complex and sensitive situations.

4.1.2 Arab Media Framing

In contrast, significant portions of Arab media framed the events as a "resistance operation" (عملية مقاومة *amaliyyat muqāwama*) or a response to recurrent attacks and bombardment. This term is commonly used in Arab media and by Palestinian groups to describe actions taken against the Israeli occupation, often implying a legitimate struggle for self-governance. On the contrary, Western media very often opts for terms like "terrorist attack" or "militant operation" to describe the same events. Here, one comes to stress the significant role of translation in framing international narratives and perceptions. While not universally condoning civilian casualties, the narrative often contextualized the actions within the broader Israeli-Palestinian conflict, emphasizing Palestinian grievances and the right to resist occupation. In addition, expressions like "Al-Aqsa Flood" (طوفان الأقصى *Tufān al Aqsā*) were used to describe the operation. The subsequent Israeli military response was often characterized as "collective punishment" (عقاب جماعي *ikāb jamā'ī*) or "genocide" (إبادة جماعية *ibāda jamā'ia*). As an example, a common headline in Arab news was "Al-Aqsa Flood Operation Shakes Israeli Occupation," or "Gaza Under Siege: Israeli Aggression Continues."

It is crystal clear that these initial framing differences immediately set the stage for divergent understandings, where the same event was presented from completely different perspectives, heavily influenced by historical context and geopolitical perspectives. (See appendix A)

4.2 The Lexical and Semantic Analysis

The researcher employed an analysis that delved into key terms, revealing their profound connotations and ideological weight. Here, the non-neutral role of translation becomes particularly apparent.

4.2.1 "Militants" vs. "Terrorists" vs. "Resistance Fighters"

In Western media, the Arabic term "*muqawama*" (مقاومة), meaning *resistance*, was almost exclusively translated as "*terrorists*" when referring to Hamas. This translation choice immediately delegitimizes the group and its actions, aligning with a specific political stance. Conversely, many Arab media outlets consistently used "*muqawama*" (resistance) or "*rijāl al-muqawama*" (رجال المقاومة - *resistance men/fighters*). When translating Western reports, if they referred to "terrorists," Arab media might retain it within quotes or rephrase it to "alleged terrorists" or simply "militants" (مسلحون - *musallahūn*), a more neutral term that avoids immediate condemnation. The choice between "terrorist," "militant," or "resistance fighter" is

a prime example of how translation shapes perception and assigns moral weight (See appendix A).

4.2.2 “Self-Defense” vs. “Aggression”

The Israeli response was almost universally, described as "self-defense" (دفاع عن النفس *difāʿ an al-naḥs*) in Western media. When translated into Arabic by Western-aligned news agencies, this term was directly rendered. However, in much of Arab media, the same actions were termed "aggression" (عدوان *ʿudwān*) or "escalation" (تصعيد *taṣʿīd*), implying an offensive rather than defensive posture. The translation of "self-defense" by some Arab outlets might be accompanied by qualifiers or can be put into inverted commas to signal disagreement with the framing.

4.2.3 “Incursion” vs. “Infiltration” vs. “Storming”

Western media usually used terms like "incursion" or "infiltration" to depict the initial crossing into Israeli territory, sometimes implying a stealthy or limited action. However, Arab media frequently used terms like "storming" (اقتحام - *iqtiḥām*) or "breaking through" (كسر الحصار - *kaṣr al-ḥiṣār* - breaking the siege), which convey a more forceful and purposeful breach, often linking it to the breaking of the Gaza blockade. The choice of the verb directly impacts the perceived intention of the actors. (See appendix A)

4.3 Translation Choices and Strategies

This stage highlighted significant shifts in meaning, emphasis, or framing due to specific translation choices including omissions and additions, lexical substitution and re-contextualization.

4.3.1 Omissions and Additions

Some Western media translations of official Palestinian statements might omit references to the historical context of occupation or the humanitarian crisis in Gaza, focusing solely on the immediate violence. In fact, information that contradicted the prevailing narrative in the target language was frequently omitted. For instance, detailed historical grievances or statistics on settler violence, prevalent in Arabic reports, were often absent in English translations.

Conversely, some Arab media translations of Israeli statements might add clarifying context about the disputed territories or the historical grievances not present in the original English. For example, a Palestinian statement detailing "the ongoing suffering under occupation" (المعاناة المستمرة تحت الاحتلال *al-Muʿānāḥal-Mustamirrataḥṭāl-Iḥṭilāl*) is translated by a Western outlet as "the ongoing conflict," (الصراع المستمر *al-Ṣirāʿ al-Mustamirr*) effectively stripping away the historical context of occupation. On the opposite side, explanatory clauses or qualifiers were often added in translation to align the message with the target audience's geopolitical understanding. Phrases like "a group designated as a terrorist organization by some countries" appended to "Hamas" exemplify this practice. It is crystal clear in this translation, that the translator plays a significant role in shifting the meaning from "the suffering" or "the hardship" (المعاناة) to a struggle or mere dispute (الصراع).

4.3.2 Lexical Substitution and Re-contextualization

When statements from Palestinian factions or Arab states using “تهديئة” (De-escalation) are translated or reported by some Western outlets, the concept is often implicitly or explicitly re-

framed to suggest something more akin to a “lull,” “respite,” or “period of regrouping” for militants, rather than a genuine peace effort or pacification. This subtle shift in emphasis undermines the notion of a legitimate ceasefire or de-escalation from the Palestinian side. Similarly, the translation of Israeli casualty figures might emphasize them as “victims of terrorism” (ضحايا الإرهاب *Ḍaḥāyā al-Irḥab*) in Western media, while some Arab translations might downplay this or include them within a broader count of “casualties of conflict,” (ضحايا الصراع *Ḍaḥāyā al-Ṣirāʿ*), blurring the distinction between civilian and combatant.

4.3.3 Emotional Tone and Modality

Beyond the literal transfer of words, translators apply significant power in modulating the emotional temperature and rhetorical force of a message. This influence operates on the level of modality (expressions of certainty, possibility, obligation, or speaker attitude) and affects the emotional quality conveyed. In highly sensitive international events, where emotions run high and narratives are fiercely contested, these translational choices can be instrumental in shaping public sentiment, rallying support, or inciting outrage. Let us examine this example;

Original (English):

“*Hamas Terrorists Massacre Israelis in Brutal Cross-Border Attack.*”

When considering two different translations into Arabic, each with distinct modality and affect, we get the following versions:

a) Translation (i) – High Affect, High Modality (Mirrors Original Bias)

The Arabic phrase “إرهابيو حماس يرتكبون مجزرة بحق الإسرائيليين في هجوم وحشي عبر الحدود” can be back-translated as “*Hamas terrorists commit a massacre against Israelis in a brutal cross-border attack.*” This translation demonstrates strong modality through verbs such as “*commit*” and nouns like “*massacre*,” which convey definitive and non-negotiable judgment. Its affective intensity is also very high, with terms such as إرهابيو (terrorists) and مجزرة (massacre) evoking fear, anger, and moral outrage. The effect of this choice is to reinforce a one-sided, emotionally charged narrative that delegitimizes one party entirely and leaves little room for nuance or alternative interpretation.

b) Translation (ii) – Neutral Tone, Reduced Affect/Modality

In contrast, the phrasing “مسلمون من حماس يهاجمون إسرائيليين في عملية عبر الحدود أودت بحياة عدد من الأشخاص” can be back-translated as “*Armed Hamas members attack Israelis in a cross-border operation that resulted in multiple deaths.*” Here, the modality is more tentative, as terms such as “*operation*” and the phrase “*resulted in*” reduce the sense of absolute certainty or moral judgment. The affective charge is also lower, since the wording avoids emotionally loaded terms like “*terrorist*” or “*massacre*.” This translation allows greater space for interpretation and potentially opens the door for more complexity, context, or alternative framings of the event.

It is worth mentioning that the same event, when translated with different modal and affective choices, can either inflame tensions and raise biased anger or allow for reflection and rational thinking. This is not just a linguistic decision — it is a rhetorical and ethical one, especially in conflict journalism and diplomacy.

a) Diminishing Emotional Impact: From “Justice” to “Fairness”

When a passionate speech by a Palestinian advocate might repeatedly invoke “العدالة” (al-adalah) – a term deeply loaded with notions of rectification of wrongs, retribution

for suffering, and fundamental human rights, especially in the context of historical grievances and occupation. The Arabic term often carries a strong moral imperative and a sense of urgency. However, when translated as “fairness,” rather than “justice,” the emotional and ideological weight is significantly diluted. “Fairness” suggests a more procedural, equitable, or even negotiable outcome, rather than a fundamental moral right demanding immediate redress. It shifts the discourse from a high-stake, rights-based demand embedded in the word “justice” to a more amenable, potentially compromised discussion within the word “Fairness”. In fact, if an Arabic statement declares:

“لا سلام بدون عدالة للشعب الفلسطيني *lā salām bidūn adāla lil sha‘b al felestini* (There is no peace without justice for the Palestinian people!).

A translation of "There can be no peace without fairness for the Palestinian people!" diminishes the urgency and inherent rightness of the demand, making it sound more like a plea for equitable treatment rather than an assertion of a fundamental right that has been denied.

4.4 Identification of Contradictions and Discrepancies

In the final stage of his study, the researcher highlighted the direct contradictions and persistent discrepancies in translated narratives between Western and Arab media, ultimately revealing the emergence of a "discourse crisis". This phenomenon is far from being a simple matter of linguistic variation; it is rather a reflection of deeply rooted ideological divides that surface through translation practices and choices.

4.4.1 Conflicting Facts

A highly significant finding of the study was the existence of different and even divergent “realities” in media representations of the October 7th events and their aftermath. In Western outlets such as *The New York Times* or *BBC News*, the events were predominantly framed as an “unprovoked terrorist attack” (هجوم إرهابي غير مبرر) by Hamas, emphasizing Israeli civilian casualties and invoking language such as “massacre” (مجزرة *majzara*) or “slaughter” (مذبحة *madhbaha*).

In contrast, major Arab media outlets like *Al Jazeera Arabic* or *Al-Mayadeen* depicted the same event as a “resistance operation” (عملية مقاومة) aimed at “breaking the siege” (كسر الحصار) on Gaza, using expressions such as “martyrdom” (الشهادة *ash-shahāda*), “liberation” (التحرير *at-tahrīr*), and “retaliation” (الرد على الهجوم *ath-tha’r* or الثأر). These represent not merely divergent terminologies but fundamentally incompatible worldviews (Baker, 2006; Khalifa, 2021). As Hatim and Mason (1997) assert, translation is not a neutral conduit of meaning but is inherently influenced by ideological positioning. Thus, audiences across linguistic and cultural divides, with divergent versions of news and conflicting interpretations, are not only informed differently—they are conditioned to perceive reality differently. They are facing many “realities” and many “truths”.

4.4.2 Obstacles to Diplomatic Solution to the Crisis

At a time when language and interpretation ought to play a paramount role in resolving crises—serving as vital tools for fostering dialogue, mutual understanding, and de-escalation—the opposite seems to be unfolding. Instead of acting as bridges between conflicting parties, language is increasingly weaponized, manipulated, or distorted to reinforce divisions, justify

violence, or perpetuate ideological narratives (Baker, 2006; Fairclough, 1995). Interpretation, which should mediate meaning across cultural and political boundaries, is often overshadowed by mistranslation, selective framing, or deliberate miscommunication (Inghilleri, 2005; Schäffner, 2004). Gutt (2000) highlights the importance of contextual relevance in interpretation, without which even well-intentioned communication can lead to misunderstanding. Meanwhile, Venuti (1995) warns of the “invisibility” of translators, whose choices—though often hidden—can profoundly shape public discourse and perception. This reversal undermines the potential of language as a peace-building mechanism and signals a deeper crisis of representation and trust in global communication. The emergence of this discourse crisis has significant diplomatic implications.

When policymakers, diplomats, and publics operate based on such divergent foundational understandings, constructive dialogue becomes extremely difficult. Language—intended to bridge understanding—becomes a site of miscommunication and misinterpretation. For example, calls for a “ceasefire” (وقف إطلاق النار) in Arab translations are often interpreted as a humanitarian necessity, while in some Western contexts, they are viewed through a political lens, implying the legitimization of a “terrorist” entity. There is often concern that a ceasefire could allow armed groups or designated terrorist organizations to regroup, rearm, or gain strategic advantage. This narrative can frame ceasefires skeptically or as potentially risky (e.g., “Critics warn ceasefire could empower militants”). According to Baker (2010), these narrative battles severely impede conflict resolution, as the parties involved are “talking past each other”, rooted in separate discursive universes.

4.4.3 Reinforcement of Existing Biases

Perhaps most critically, the study underscores how translation can reinforce existing biases within different media ecosystems. Venuti’s (1995) notion of the “invisibility” of the translator is particularly relevant here; rather than remaining neutral, translators and editors often reproduce the dominant ideological narratives of their sociopolitical environments. In the West, translations tend to preserve the Israeli perspective, framing Hamas actions in terms of terrorism, while Arab translations foreground Palestinian suffering and Israeli aggression, positioning Palestinians as victims of colonial occupation. This selective framing contributes to echo chambers in both spheres, where alternative narratives are often dismissed as propaganda or misinformation (Bielsa & Bassnett, 2009). The result is not mutual understanding but mutual delegitimization, which obstructs empathy and perpetuates the cycle of conflict.

In conclusion, the media coverage of October 7, particularly through the perspective of translation, exemplifies how the linguistic choices made by translators, editors, and media organizations are not innocuous. These choices intentionally mediate and shape meaning, contributing directly to divergent “crisis discourses” and ultimately leading to a profound “discourse crisis” that exacerbates communicative challenges in reporting on highly sensitive international events. This highlights the critical need for greater awareness of translation’s power and its potential to either bridge or widen cultural and ideological divides.

5. Discussion

The findings from this study confirm that the media coverage of the October 7 attack exemplifies a dynamic interplay between “crisis discourse” and “discourse crisis,” with translation serving as a pivotal, yet often understated, mediator. The distinct framing employed

by Arab and Western media, coupled with the non-neutrality of translation practices, created a fragmented global understanding of the event.

5.1 Key Findings and Explanation of Results

Our research reveals something striking: the same event, seen through different ideological perspectives, can give rise to opposing crisis stories. On one hand, Western outlets framed the violence as a sudden terrorist assault, foregrounding grief and building a case for strong military payback. On the other hand, Arab channels spoke of resistance and linked the outburst to a long history of occupation, suffering, torture, and rights abuses. Translation, within this crisis journey and between these rival accounts, goes far beyond the simple act of reporting; it crafts a shared moral and political world for the people who consume these translations. Translation choices, as shown through the previous lines, show how translators-pressed by newsroom guidelines and the politics of the receiving society-pick words, drop awkward details, add clarifying phrases, and shift a speaker's frame, all of which steer the story in one direction or another. Such practices prove that translation is hardly neutral, echoing Baker's work from 2006 and 2018, which reminds us that translators are meaning-makers in their own right, not just silent passageways between languages.

5.2 Comparison with and Discussion of Similar Research

Our results fit neatly into a larger body of work that studies how conflict is presented in the media and how language drives those images. Van Dijk's (2006) analysis of crisis talk and his idea of the ideological square explains how powerful groups-including news outlets-shape language to push their own political goals when situations heat up. We show that squares in action by offering very different stories about the same event, depending on the outlet or language version a person chooses. Our study also speaks to translation research, echoing Baker (2006, 2018), and Chouliaraki and Fairclough (1999), who warn about crises of discourse. The mismatches we spotted in translated news clearly picture their promised breakdown in coherence across media landscapes, which in turn create rival and opposed readings. By documenting our case in a fast-moving and politicized global moment, we add empirical weight to their theories and spotlight the often invisible work of translation itself.

5.3. Impact and Measures to be Taken

The deepest effect of today's truth crisis is a gaping split in how people see the world, which fuels deadly levels of polarization. When different audiences encounter their own versions of the facts, trust in all sources declines, biases deepen, and self-contained bubbles emerge. That dynamic blocks real cross-cultural talk, and also ties diplomats' hands and slows humanitarian aid. Policies built on such shaky ground are often blind, miscalculated, or simply useless.

There are steps we can take to tame these problems. Most important, we must teach people to read with a questioning eye and a critical mind, to note who frames the story and why, and to hunt for rival angles. News outlets, meanwhile, should clearly explain how they translate terms and note when a word carries political weight. Finally, researchers should draft ethics guidelines for translators working in conflict zones, helping them navigate the high stakes and fast pressure.

6. Conclusion

This study has compellingly demonstrated that translation plays a critical, non-neutral role in shaping public understanding during international crises, specifically exemplified by the

media coverage of the October 7 attack. The initial “crisis discourses” crafted by Arab and Western media outlets diverged remarkably, revealing remarkable ideological divides. This divergence was then compounded and transmitted through translation practices that often prioritized narrative alignment over strict linguistic neutrality, leading to varying depictions of the same event. As a result, the tension between these competing, translated narratives culminated in a “discourse crisis,” where audiences were presented with irreconcilable interpretations. This breakdown in coherence across global media landscapes not only erodes trust but also fuels polarization, significantly hindering effective dialogue and a nuanced understanding of complex geopolitical realities. Recognizing the powerful influence of translation in crisis reporting is therefore essential for fostering critical media literacy and promoting more informed global perceptions.

A strength of this study is its direct application of established discourse and translation theories to a contemporary, highly relevant case study, offering empirical insights into the mechanisms of narrative construction and mediation. The comparative analysis of Arab and Western media provides a rich ground for observing ideological divergence. However, a limitation is the scope of media outlets analyzed, which, while representative, could be expanded to include a wider range of sources (e.g., social media, non-state media) for a more comprehensive picture. Furthermore, the inherent complexity of identifying the exact “source” of a translation decision (individual translator vs. editorial policy) can be challenging without direct access to newsroom processes.

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Appendix A: Key Terms and Divergent Translations in Western and Arab Media

Arabic Term	Transliteration	Literal Meaning	Western Media Translation/Usage	Arab Media Translation/Usage
مقاومة	<i>muqāwama</i>	resistance	Terrorists (esp. for Hamas)	Resistance / Resistance fighters (<i>rijāl al-muqāwama</i>)
رجال المقاومة	<i>rijāl al-muqāwama</i>	men of resistance / resistance fighters	Terrorists	Resistance men/fighters
مسلحون	<i>musallahūn</i>	armed men	Militants (sometimes "alleged terrorists")	Militants (neutral tone)
دفاع عن النفس	<i>difāʿ ʿan al-naḥs</i>	self-defense	Self-defense (standard framing)	Often rejected; replaced with "aggression" or placed in quotes
عدوان	<i>ʿudwān</i>	aggression	Rarely used	Aggression (offensive framing)
تصعيد	<i>taṣʿīd</i>	escalation	Escalation (sometimes used)	Escalation (frequent)
اقتحام	<i>iqtiḥām</i>	storming/forced entry	Infiltration / Incursion	Storming / Breaking through
كسر الحصار	<i>kasr al-ḥiṣār</i>	breaking the siege/blockade	Infiltration / Breach	Breaking the siege (positive connotation)
المعاناة المستمرة تحت الاحتلال	<i>al-muʿānāh al-mustamirrah taḥt al-iḥtilāl</i>	ongoing suffering under occupation	The ongoing conflict	Ongoing suffering under occupation
عملية مقاومة	<i>ʿamaliyyat muqāwama</i>	resistance operation	Terrorist attack	Resistance operation
الشهادة	<i>ash-shahāda</i>	martyrdom	Suicide bombing (in violent contexts)	Martyrdom (positive framing)
التحرير	<i>at-taḥrīr</i>	liberation	Not commonly used	Liberation (ideological framing)
الثأر / الرد على الهجوم	<i>ath-thaʿr / al-radd ʿalā al-hujūm</i>	revenge / retaliation	Retaliation (sometimes)	Retaliation / justified response

Appendix B: Key to Transliteration of Arabic Letters and Sounds

Arabic letters	Name	English IPA ¹	Arabic letters	Name	English IPA
ء	Hamza	ʔ	ظ	ẓā'	zʔ\ðʔ
ا	Alif	a:[ʔa]	ع	‘ayn	ʕ
ب	Bā'	B	غ	ghayn	ɣ
ت	Tā'	T	ف	Fā'	F
ث	thā'	θ	ق	Qāf	Q
ج	Jīm	dʒ	ك	Kāf	K
ح	ḥā'	ħ	ل	Lām	L
خ	Khā'	X[kh]	م	Mīm	M
د	Dāl	D	ن	Nūn	N
ذ	Dhāl	ð	ه	Hā'	H
ر	Rā'	R	و	Wāw	w,u:[uu]
ز	Zany/zāy	Z	ي	Yā'	j,i:[ee]
س	Sīn	S	آ	alifmaddah	a:[aa]ʔ
ش	Shīn	ʃ	ة	Tā'marbūṭah	a,at
ص	ṣād	sʕ[ʕ] ²	ال	aliflām	a:[a]
ض	ḍād	dʕ[ḍ]	ى	alifmaqṣūrah	(var.)
ط	ṭā'	tʕ[t]			

¹. International Phonetic Association.

http://eprints.whiterose.ac.uk/81481/13/Automatically_Generated_Phonemic_Arabic_IPA.pdf

Machine Translation and Data Mobility Crisis: A Curse, or a Blessing?

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Abstract

Advances in machine translation (MT) foster data transfer and the mobility flow of information. This process is essential not only for global communication and coping with geographical, linguistic, and cultural barriers but also for the democratization of information sharing. This paper endeavors to explore the dualist nature of MT and evaluate its benefits as well as its shortcomings. Making use of mobility studies, this chapter seeks to offer a nuanced evaluation from a human translator's point of view. The rationale is to expose the paradoxical nature of machine translation and make its users aware of the moral crisis behind it. Both quantitative and qualitative analyses are conducted and show that there is unfair data mobility and unjust geographical coverage. Precise case studies from the author's own translations and other sources highlight that there is still a lack of accuracy and precision in MT linguistic output in comparison with human translation. The impact is a continuing crisis, denoting that whenever there is machinery in human life, there is a huge risk of unfairness, alienation, and loss.

Keywords: alienation, assessment, crisis, machine translation, human translation

1. Introduction

Translation was, is, and will continue to be a human art at its core. R.T. Bell (1991) even further suggests that translation is mutually an art and a science. The translator is someone who masters the native language and knows about the target language due to long years of scholarship learning not only its linguistic system but also through training in translation and careful trials to bridge cross-lingual barriers and inform others about this trade. Many Massachusetts Institute of Technology references, on the other hand, insist on oversimplifying the definition of translation as "the task of transforming an existing text written in a source language, into an equivalent text in a different language, the target language" (Goutte et al., 2009, p. 1), or simply put "to transpose a source-language text into a target-language text" (Poibeau, 2017, p. 1). Yet, translation is indeed a far more complex process. The invention of computers in this context serves as a competitive target to get rid of the human touch in a global world. The reality proves that MT is used quite often every day at an increasing level in chat rooms, in social media, in education, helping people to learn new languages, and even in the translation of a lot of documents for students, businessmen, and in academic spheres. Millions of users trust web browsers' option to translate for them the content of any site, for surfing a website written in a foreign language may seem like moving in the jungle. Though the apparent noble mission is to bridge communication, enhance accessibility, allow the flow of enormous quantities of data, and ensure cost effectiveness by reducing financial charges spent on human translators, MT, like any other machinery, is part of human alienation and hides a deeply rooted ethical crisis.

2. Literature Review

2.1 The History of Machine Translation

Machine Translation has a long history; some references suggest that it goes back to the days of al Kindi (9th Century AD) the father of the science of cryptography and thriving with Arab translations from various sources (Khan, 1996) since the Arabs can be considered as the “first in laying down the basic algorithms in cryptanalysis” (Mrayati et al., 2002, p. 11). The principle is to decipher symbols using statistics, probabilities, and comparative analysis of letters and words, making use of what linguistic terminology refers to as the typology of any natural language. Other references highlight that MT in its modern features, as defined by the Oxford Advanced Learner’s Dictionary “the process of translating language by computer” (Hornby, 2015), began in the 1940s (Goutte et al., 2009), or “starting in the days of the Cold War” (Bhattacharyya, 2015, p. xix).

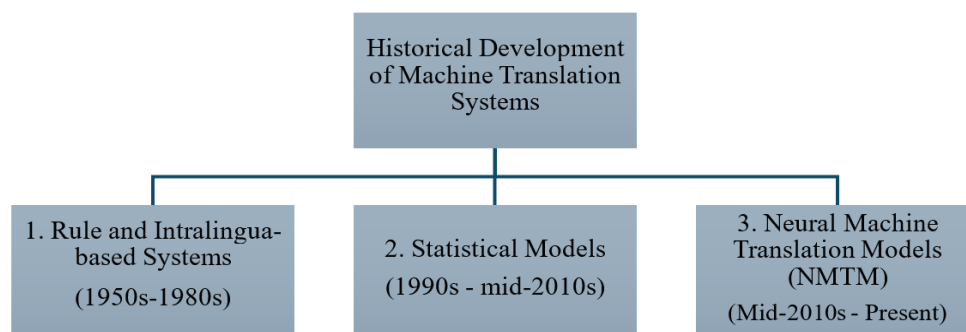
Yorick Wilks cites five generations of MT (Wilks, 2008, pp. 11-25). He mentions the generation of the 1950s that relies more on statistical methods and speech algorithms, namely the works of IBM and the Hidden Markov Model, and another generation relying on machine-assisted human translation (MAHT) advocated by Martin Kay (1997). Both generations, according to Wilks, exclude the linguistic theory’s help in offering a solution for MT. Another generation saw the light during the 1970s, relying more on artificial intelligence (AI) with a simple endeavor to make the machine learn from the already good human translations. The generation that still competes up to now is another model, namely the SYSTRAN system, which relies more on Neural Machine translation technology. Today, the most developed generation is a hybrid technology that blends the statistical and the symbolic. Still, the hostility towards the linguistic theory underlying the full process is a reality. Eventually, to sum up the scope of MT as described in Figure 1, we can safely say that there are only three frameworks that summarize the technical background of this field. A similar tripartite approach is also adopted by other references (Bhattacharyya, 2015; Naveen and Trojovský, 2024). First, the rule-based systems, such as intralingua-based systems that represent the ancient applications that depend upon dictionaries and grammar rules and consist of direct translation, or what is referred to in the human translation field as the literal translation. This method is quite the same when you look up the translation of any word in an online or installed electronic dictionary, with the kind of digital version of the paperback dictionary you might have on your shelf.

Second, statistical models with roots dating back to al-Kindi but developed up to now. Working on translation probabilities based on word alignment and lexical occurrence frequency, mathematics is a great tool in this context and “grounding in linguistics and probabilities and covers the major models for machine translation: word-based, phrase-based, and tree-based” (Koehn, 2010, p. ix). The most widely used translation systems that use variants of this model today, such as Google and Bing translation, are all based on a variety of these statistical MT translations but use other mixed models as well.

The final model is the Neural MT, which is according to Phillip Koehn the most significant model today (Koehn, 2020, p. 30). As its name suggests, NMT is an emerging artificial intelligence system that works by imitating, and perhaps mimicking, human brains to compete and later replace human translators. It translates phrases between languages using deep learning throughout the exposure to an encoder-attention mechanism-decoder model. Similar to the human brain, NMT develops connections and data networks over time to become more intelligent. Simply put, the whole process from the perspective of neural machine translation (NMT) and NMT designers is to prepare data from both the source language (SL) and target

language (TL), align such data, and take into consideration the normalization, diacritics and tokenization of TL, then train the model with the maximum dataset.

Figure 1
Machine Translation and its History

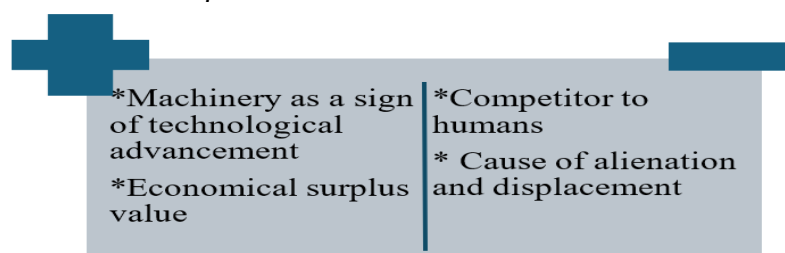


Eventually, the inclusion of artificial intelligence (AI) in translation is of paramount importance. The term AI was first introduced by McCarthy (1956). The term “AI” is currently defined in many different ways, and no consensus has been reached to agree on a common definition of AI. Given the fact that the meaning of AI is dynamic and constantly changing, and more to the point, since its study's interdisciplinary nature, it is difficult to develop a common definition of AI where “Computer systems that have been designed to interact with the world” (Luckin et al., 2016, p.14). Many scientists and researchers consider AI to be a computer-like device or computer system that mimics human cognitive capabilities (Russell & Norvig, 2010), while others define AI as a set of computer capabilities that are primarily related to education, especially training. The birth of cloud-based translation offering pertained models for consumers is a normal development in this field.

2.2 Machinery inside Marxist trends and Mobility Studies

The assessment of machine translation in this paper will rely more on human translation, namely, my case study, which is interplayed with other human disciplines. To evaluate MT, our analysis depends on an interdisciplinary model that combines Karl Marx's view of machinery in an interplay with John Urry's new mobility turn or paradigm. The inclusion of Kenneth Burke's theory (1966a) on defining man as a symbol user, consumer, and victim of his own tools can be of great help as well in understanding what is going on in this field. The first reflects an ambivalent perspective towards machinery in general. On the one hand, machinery as a sign of technological advancement helps in improving human labor, providing surplus value. This paradox is summarized in Figure 2. On the other hand, it serves as a tough competitor to humans and therefore leads to social alienation. MT becomes a productive force monopolized by big capitalist companies, rendering the algorithmic process a dehumanized act of enslavement.

Figure 2
The Paradox of Machine Translation



2.2.1 Machinery for Karl Marx

As Adam Smith puts it, value in any system is related to scarcity value, use value, and exchange value. Scarce commodities are at a high rank of value, for rare things are hardly found (Smith, 1776, pp. 22-25). David Ricardo refers to Adam Smith's *Wealth of Nations* where the value of any commodity is related to "the proportion between the quantities of labour necessary for acquiring different objects, seems to be the only circumstance which can afford any rule for exchanging them for one another" (Ricardo, 1891, p. 13). A key idea in classical economics is David Ricardo's theory of value, sometimes called the labor theory of value. This theory states that the amount of labor needed to make an item, including the labor needed to produce the machinery and raw materials needed for the process, determines the good's worth (Ricardo, 1891, p.13). Marx's critical view of value links all that is said above to the production process in its socio-economic context. It is in this context that Cutler, et al. claim that "Marx's theory of value is primarily a theory of exchange and of exchange value, and insisting that the concept 'value' explains the way in which production relations govern exchange relations" (Cutler et al., 2013, p.11). It follows that a machine's productive power is defined by its technical features, not by the labor required to create it. The following points explain how machine productive power affects value relationships: (A) Productivity influences value relations by "cheapening" (in terms of value) the labor-time component per unit of the product; (B) Labor time is what gives a product its value.

Karl Marx's account of machines is ambivalent and complex but stays critical on the whole. On the one hand, he does acknowledge that machines can increase the productivity of labor, allowing workers to produce more goods in less time he says: "...machinery is intended to cheapen commodities and, by shortening the part of the working day in which the worker works for himself, to lengthen the other part, the part he gives to the capitalist for nothing. The machine is a means for producing surplus value" (*Das Capital*, 1976, p.492). On the other hand, Marx emphasizes that the primary purpose of machinery in the context of capitalist production is to increase profits and produce surplus value, rather than to improve the living standards or reduce the working hours of the workers. When he traces the history of the development means of production, he notices progress from the mere human use of simple tools in agriculture and elsewhere to the technological advancement through industrialism which gave birth to what he calls "a whole system of an automaton". Yet, Marx's view in *The Grundrisse: Foundations of the Critique of Political Economy* (written between 1857 and 1861 yet published during WWII) is quite different from his complex highly critical, and developed social conception of the intricate relationship between human beings and what they created in terms of machinery in the *Das Capital*, Volume one (first published in 1867).

As we can see the descriptions in the *Grundrisse* portray the process where there is an assemblage/union between the human body and the machine into a system, whereas descriptions in *Das Capital* reflect the superiority and power of the machine which not only is a competitor to men but also a dominating power enslaving them. Marx highlights the capitalist motivation for the development of machinery in *Das Capital*, emphasizing that it was intended to generate surplus value and boost profits rather than lessen the workload for employees or shorten the workday. He also takes issue with the detrimental consequences that machinery has on laborers, including increased alienation and exploitation. Karl Marx's analysis of machinery in *Capital* provides a critical framework for understanding MT as a tool reflecting the capitalist exploitative logic that prioritizes profit over ethical values.

Yet, Marx offers a more in-depth critique of machines in the *Grundrisse*, emphasizing their function in the capitalist mode of production as well as their effects on workers. He admits that

labor productivity may be increased by machines, enabling workers to produce more items in less time. Marx's critique in the *Grundrisse* highlights how workers are negatively impacted by machines, including increasing alienation, enslavement, and exploitation. As a whole, Marx acknowledges the potential advantages of machines in rising productivity, even though his critique of them in *Das Kapital* is mostly unfavorable. Instead of raising living conditions or cutting down on working hours, he highlights that the main goals of capitalist machinery use are profit maximization and worker exploitation. Machine Translation is not an exception because it gives rise to this crisis of communication, falling into the same paradox: offering a cost-effective service that allows development, but at an exorbitant ethical cost. Contemporary Marxists have drawn attention to such a crisis for so long. Therefore, we need to take a glance at such theoretical development.

2.2.2 Contemporary Marxism

Many readers of Marx provided various interpretations: some scholars contend that Marx's "Fragment on Machines" within the *Grundrisse* highlights the notion of the general intellect and its function in the advancement of capitalism. According to this reading, Marx's conception of machines includes the possibility that they could represent the collective intellect, which would change how work is organized and how things are produced. Massimiliano Tomba and Riccardo Bellofiore (2014) are very representative of this view. They explore the concept of the general intellect and its role in capitalist development, drawing on Marx's "Fragment on Machines" in the *Grundrisse*.

Others, like Althusser and his colleagues, saw that "Marx presents the capitalist system as a mechanism, a machinery, a machine, a construction" (Reading Capital, p.193). Althusser (1971) offers a close reading and critical interpretation of "Fragment on Machines" in the *Grundrisse*, contending that the focus of the text is actually on the function of machines in the capitalist mode of production rather than on the general intellect. He addresses the significance of machines concerning interpellation and ideology. He contends that ideology forces people to become subjects and that this process is analogous to being "hailed" by a stranger on the street who stretches out her arm to offer you a ride. With regard to work, social structure, and the capitalist system, this critical reading of Marx's "machines" provides a new angle.

It is also believed that Marx's critique of machinery is essential to his larger attack on capitalism. According to some readings, Marx's social critique of machinery is a component of his gloomy assessment of the prospects for a capitalist economy, which is based on his dialectical materialist theory of history and his critical viewpoint on the workings of capitalism. Among those who advocated this view, we can mention Donald Mackenzie (1984), who explores Marx's theories regarding machines and how they affect social structure and labor. Marx's extensive treatment of the topic, especially in Volume 1 of "Capital," according to MacKenzie, shows a distinct viewpoint. He argues that Marx contended that social connections, not technology, shaped the enormous complex of technological advances of his day, including the introduction of large-scale mechanized manufacturing (p.475).

That being said, MT tools appear to provide more productivity and access to broader markets (a type of "freedom" of movement in the digital realm), they also have the "fetters" effect of increasing competition and pushing translation rates lower. In order to stay competitive, human translators are being forced to accept lesser pay and more stringent deadlines, so turning into a mobile proletariat in the digital gig economy.

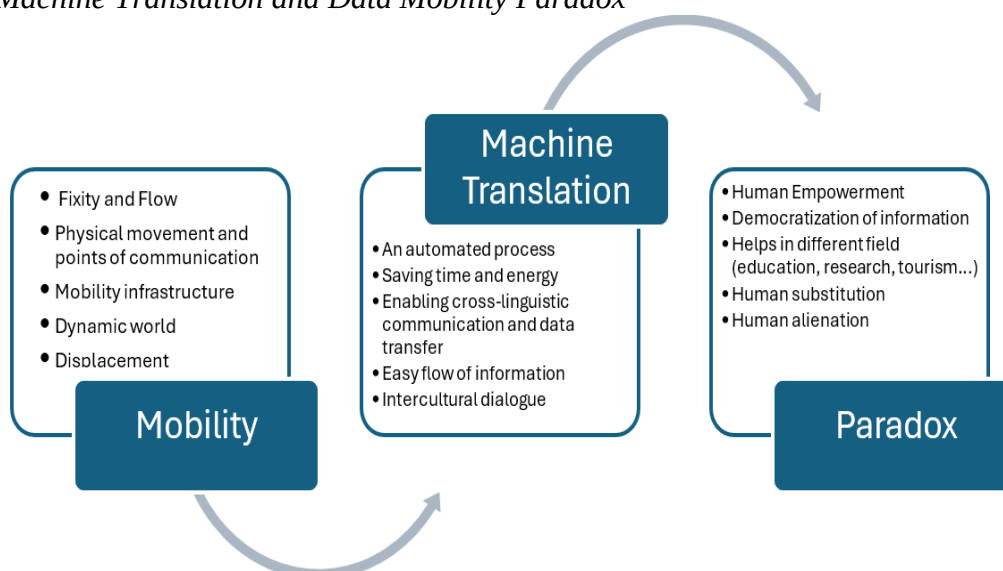
2.2.3 Machine Translation inside the New Mobilities Paradigm

The need for Urry's new mobilities paradigm is to account for data mobility in its advantages and defects. Machine translation turns out to be a double-edged weapon, for though it connects people and communities, it commodifies language and makes it a mere service that expands commercial exploitation. Tim Cresswell further suggests that any mobility involves displacement, some loss, and "lines of flight" (Cresswell, 2006, p. 2). The various facets of political, economic, and social life that are in some manner "on the move" or removed from "home" seem to be changing as a result of these convergent mobile technologies. In a mobile world, there are numerous and complex links between physical movement and points of communication. These connections create new unequal fluidities that are frequently challenging to regulate.

Since people, machines, images, information, power, money, ideas, and hazards are "on the move," connections are being made and broken at a frequently accelerated rate around the globe, it appears that physical changes are "de-materializing" links (Urry, 2007, p. 5), and de-humanizing I shall add. What MT allows is a priority for English being the first language in the hierarchy. Hence, English becomes at the center, a capital for those who can afford to use it, while other languages will stay marginalized. MT is, in this respect, a commodity and a service offered by big corporations, like Google, Microsoft, IBM, and OpenAI that are looking for profit from such a process.

Urry indeed highlights a paradigm where machine translation can facilitate communication and the easy flow of information between countries and people, transcending linguistic barriers. Yet, he also invites us to critically assess the unjust nature of such a flow. The link between machine translation and mobility, as summed up in Figure 3, reflects how the process is even more paradoxical.

Figure 3
Machine Translation and Data Mobility Paradox



Assessing the whole issue needs a critical eye since critical thinking is considered to be the skill of the 21st century that allows people to overcome complex problems of this genre, evaluate all sorts of information, and distinguish false and true data amongst them, especially in the world of technology and MT. Thinking critically is a special behavior attached only to the human mind and uniquely to human symbol creation. When it comes to translation, it provides

more than the consumption of texts, but rather exercises deeper insight, connections with other works, analysis, and interpretation of different materials. The concept of critical thinking emerged centuries ago when Socrates, the ancient Greek philosopher and mentor, for instance, proposed a method of inquiry for his disciples that challenged beliefs, validating them with evidence and facts.

The same tradition went on by enlightened philosophers as a way to seek the truth, especially the Cartesian notion of doubt as a sign of thinking and being, Kant and his *Critique of Pure Reason* where he discusses the limitations of the human mind, and David Hume's skeptical epistemology (Descartes, 2008; Hume, 2023; Kant, 1998) and the same skill has been utilized throughout human history (Paul & Elder, 2019). As stated by Glaser (1941), critical thinking consists of seeking evidence to support a viewpoint or argument. Such a skill essentially opens the door to the world of dynamic interpretations. Therefore, understanding goes beyond what is superficial and digs deeper to undergo a reading in dialogue with the author's spirit. This is the key to solving treasures hidden in written words (Wooley, 2011). Comprehension of any written materials and then the attempt to translate them is a miscellaneous activity that involves using a variety of cognitive abilities and skills; it involves deriving meaning from the text (Wooley, 2011).

According to Kahneman and Tversky (1982), individuals who engage in critical thinking actively avoid intellectual laziness and are characterized by their engagement, dissatisfaction with surface-level answers, and heightened skepticism toward their intuitive thoughts. When it comes to machine translation, human translators should apply critical thinking which involves assessing different perspectives and making informed decisions and judgments. Kong and Seng (2006) also asserted that critical thinking encompasses fostering traits such as a strong curiosity to explore various issues. McPeck (1981) described critical thinking as the willingness and ability to challenge assumptions, which requires a deep understanding of the relevant subject or field. Ennis (1993) defined critical thinking as the capacity to employ rational and logical reasoning techniques, analyze problems and issues based on prior experiences, and synthesize information, knowledge, and skills.

3. Methodology

This research relied on both quantitative and qualitative approaches to tackle the case study. A comparative analysis of data is of paramount help also in this respect. The assessment of machine translation in this paper will rely more on human translation, namely, my case study, which is interplayed with other human translations in parallel with machine translation. To evaluate MT, our analysis depends on an interdisciplinary model. Quantitative data and evaluative measures of MT are retrieved from available figures and percentages as advertised on their websites. Many reliable statistical websites offer sound reports and statistics that help us gain some insights about online MT coverage, its overall use, and the languages included in MT. Comparative tables include collected data in an attempt to show the unfair representation of languages inside MT. Further figures account for uneven linguistic and geographical coverage of MT. When it comes to qualitative analysis, this paper carries on the same line of Marxist and mobility studies. The Marxist deconstructive approach to machinery, including machine translation, is still valid. Case studies, including the author's translation and other human translations, are presented to support the findings. Results show the inaccuracy of MT and the deep ethical crisis behind the debate.

4. Findings

Our point of departure is that “All the world seems to be on the move” (Sheller & Urry, 2006, p. 207). Urry (2007) has observed that human beings and their products have become “bits of scattered information distributed across various 'systems' of which most are unaware” (p. 15). Mobility includes translation as a way of transferring data between texts and cultures. Seen from this angle, everything can be treated as what Latour terms a “circulating entity” (Latour, 1999, p. 17), receiving a series of translations in a network of digitized systems through personalized machines. Translation in this context refers to the circulation that gradually moves us in what Urry (2007) qualifies as “virtual” and “communicative” travel (p. 47). Yet, is this mobility fair, and even among all countries and languages?

No one can deny that machine translation has a crucial role in today's life, but at what cost? We should be aware of the benefits such technology offers. It is involved in various domains transcending linguistic barriers, namely travel and tourism, business, diplomacy, education, personal communication, research, and collaboration (Naveen & Trojovský, 2024, p. 5). On the surface, this technology belongs to the service sector that bridges linguistic obstacles, fosters intercultural communication, and “promotes multicultural understanding by facilitating the exchange of ideas, knowledge, and cultural perspectives” (p. 6). At a deeper level, machine translation is rather a commodity that faces real challenges with harsh impacts.

4.1 Machine Translation is a Blessing

Due to its cost-effectiveness, the use of machine translation is a real alternative in many areas. Its primary goal is to save time and money on the translation of texts. Such an alternative can assist translators, learners, and all of its users in a mobile, dynamic world. The need for information at a global scale depicts an increasing demand for MT presence and use in websites, scientific literature, e-commerce, and education. Eventually, machine translation does not only cover texts but also image and speech translation because “text translation, image translation and speech translation have been widely used in real applications based on recent advances in artificial intelligence techniques” (Wang et al., 2021, p. 149). Besides, neural machine translation has improved the quality of the translated texts (Kasperé & Liubinienė, 2023; Wang et al., 2021).

In education, for instance, MT can foster a multilingual environment. Children are already using these tools effectively (Macías et al. 2020, p. 68) to improve skills like reading and writing (García & Peña, 2011; Jiménez-Crespo, 2017; Tsai, 2019). At the academic level, for example, Steigerwald and her colleagues mention that “translating scientific abstracts is already a common practice for some journals in bilingual or (primarily) non-Anglophone countries” (Steigerwald et al., 2022, p. 991). Students in the academic sphere are profiting from MT because “MT integration in language teaching and learning has received academic attention” (Deng and Yu, 2022, p. 7598). Teachers also recognize the importance of MT and “have a favorable opinion of this application” (Purnama, 2022, p. 3177).

The use and beneficial achievements of MT extend to further domains. According to Naveen and Trojovský (2004), in addition to the importance of MT in education, it also contributes to five more trades, namely research, business, travel and tourism, diplomacy, and personal communication. They also list 8 crucial positive impacts present in the use of this tool, such as “breaking language barriers”, “fostering multicultural understanding”, “enabling global collaboration”, “enhancing access to information”, “bridging the digital divide”, and “facilitating humanitarian efforts” (Naveen & Trojovský, 2024, p. 6).

4.2 The Crisis behind Machine Translation

Despite the progress made while using machine translation, pitfalls, challenges, and shortcomings demonstrate that such artificial machinery is far from being perfect. This paper attempts to unveil, both quantitatively and qualitatively, that only a few privileged languages are represented in these technologies. Besides, the whole picture hides a capitalist endeavor looking for profit at the expense of quality since “many professors recognize that this tool cannot be useful because the grammar of the translation results is incorrect” (Purnama, 2022, p. 3178). Even though MT can communicatively handle the process of data mobility, it is still doing it in a deformed way, for “incorrect or offending translations may occur” (Plenter, 2023, p. 1268320). Furthermore, an evaluation of MT accuracy is needed so that we can grasp the harshness of the work that needs to be done for future research.

4.2.1 Unfair Mobilities in Machine Translation

The involvement of language technologies in general, and MT translation in particular, promotes multilingualism and communication, but “only a very small number of the over 7000 languages of the world are represented in the rapidly evolving language technologies and applications” (Joshi et al., 2020, p.6282). In reality, the number of unrepresented languages is far beyond the represented ones. Figure 4 unveils that the top machine translation platform (Google Translate) only covers 3,48% of the total estimated number of 7159 languages as counted by Ethnologue Research Center (Ethnologue, 2022). The still unrepresented languages percentage by this technology is 96,52 %, which shows the amount of work that needs to be done by various contributors to alleviate this disparity.

John Urry’s concept of uneven mobilities is evident in the disparities in MT quality and accessibility across languages. There are real gaps and doubts about whether the “proposed language technologies extend to other languages” (Joshi et al., 2020, p. 6290). For example, Google Translate, Yandex Translate, and the like online platforms support just a few languages, among thousands of other forgotten tongues (see Table 1), but the quality of translation varies significantly. The example of the underrepresentation of African languages, for instance, is highly suggestive. It is in this respect that Nekoto and his colleagues (2020) conclude that “Despite immense improvements in MT over the past decade, MT is centered around a few high-resourced languages” (p. 2144). However, High-resource languages like English, Spanish, and Chinese receive far more attention in terms of data and development, while low-resource languages like Yoruba or Māori are often poorly served. This reinforces linguistic hierarchies, as speakers of dominant languages benefit more from MT technologies. My findings in Figure 4 show that the top 7 machine translation platforms cover only 9.1% altogether.

Research conducted by Joshi et al. (2020) is more optimistic, though it still highlights the “digital language divide,” (p. 6283) showing that only 20% of the world’s languages are supported by MT systems, leaving billions of people excluded from global digital communication. Based on their empirical findings, Joshi and his colleagues propose a harsh taxonomy of six classes of languages stratified by numbers starting from 0 to 5 and qualified by very sarcastic labels going from: “The left behinds” i.e. the ignored languages, “The Scraping-Bys” which are joining the ‘race’, “The Hopefuls” that are striving to keep alive in this technological tide, “The Rising Stars” with a sturdy online existence, “The Underdogs” showing their ‘digital superiority’, and finally “The Winners” which have a massive dominant presence (p.6284). The paradox is that the highly online-represented languages in various datasets represent just a few people around the globe.

Table 1

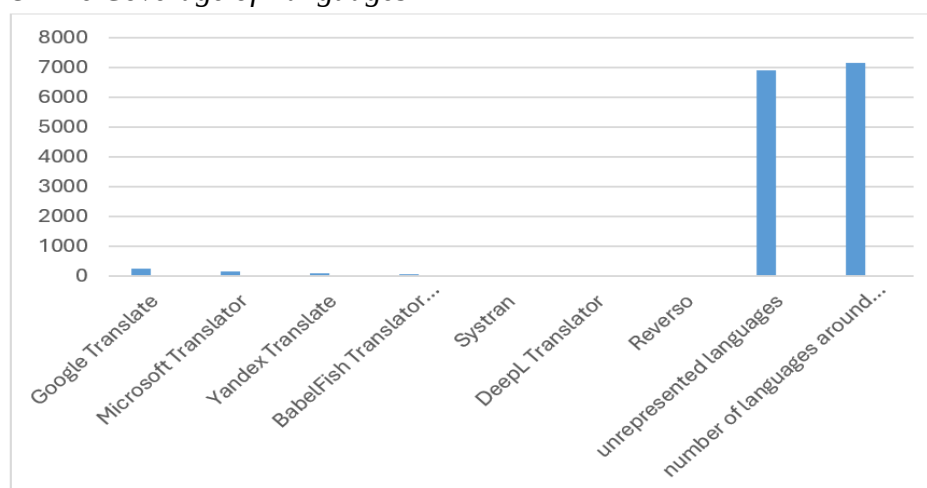
Number of Supported Languages in Famous Online Machine Translation Platforms

Online machine translation platforms	Number of supported languages	Linguistic Coverage %
Google Translate	249	3,48%
Microsoft Translator	179	2,50%
Yandex Translate	94	1,31%
BabelFish Translator	75	1,05%
Systran	55	0,77%
DeepL Translator	33	0,46%
Reverso	26	0,36%
Unsupported Languages	6910	96,52%
Number of languages around the world	7159	

To account for this inequality, where the continents with the most spoken languages are still under-represented, we can mention that these platforms are designed and commercialized by American companies. Ethnologue Research Center explains that “This is due first to the colonial influence of the British Empire, and later to the spread of American culture” (Ethnologue, 2025). Further technical factors can account for this fact because, as a Google Translate expert explains, “The added language should have enough publicly available datasets on web to train the Neural Machine translation and so on and so forth” (W16 Engie, 2021). This leads to another crucial factor that native speakers of thousands of unrepresented languages, other than English, are not actively involved in the online use of their mother tongues either in the written or spoken media, let alone the production of translations that cover scientific literature, books, articles, websites with multiple languages, governmental pages and so on.

Figure 4

Online Coverage of Languages



Discrimination not only stays at the level of classes of languages but also extends to reach gender inequality. Marcelo Prates and his colleagues conclude in their conducted experiment on the Google platform of translation that “Google Translate exhibits a strong tendency towards male defaults” (Prates et al. 2019, p. 11987). Thus, machine translation can explicitly exhibit gender bias at the time “ELIS data confirms that the language industry is a women-dominated industry, with as many as 80% female independent professionals” (*European Language Industry Survey*, 2023, p. 5). This reflects a stereotypical unfair prejudice at the level of

translation, deeply broadening the gender roles in our societies. This unequal distribution of roles reflects the rather commercial zeal of translation companies behind these machines, neglecting the necessary element of accuracy needed in this process.

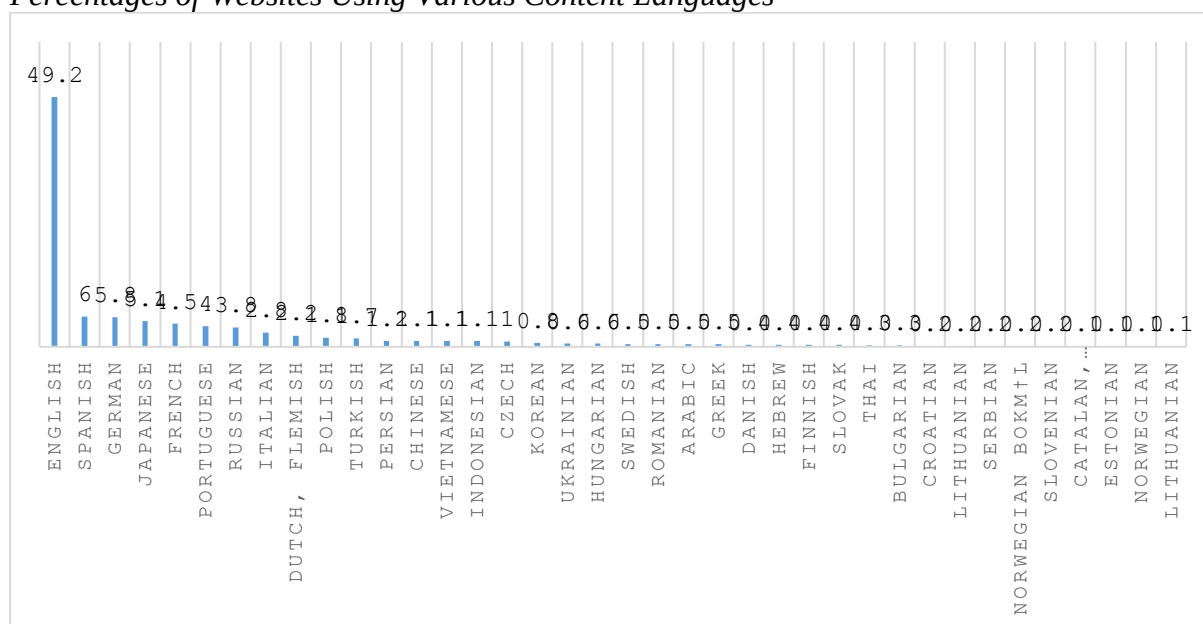
4.2.2 A Marxist Critique of the MT Industry

Since the primary goal of big companies behind the development of machine translation is financial profit at the expense of scientific accuracy, Marx's critique of machinery as a tool revealing capitalist exploitation is evident in the way that MT technologies are developed and deployed by these giant corporations. For instance, MT systems like Google Translate and Microsoft Translator rely on vast amounts of user-generated data, namely online published materials such as human translation, the contribution of content creators in Wikipedia, blogs, and social media, which are often collected without explicit consent or compensation. This fact is advertised by Google Translate as a free service available for any user. For example, a study conducted by Caswell and Budhiraja (2020) found that MT systems often exploit low-paid workers in the Global South to generate training data, such as annotating translations or correcting errors. This highlights the exploitative labor practices underlying MT development and the North versus South dichotomy as depicted by Gramsci (Gramsci, 2015). Google Translate, for instance, advertises that "Google's service, offered free of charge, instantly translates words, phrases, and web pages between English and over 100 other languages" (highlighted words as on their website), where English becomes the lingua franca, and the other languages are listed as attributes.

Statistically speaking, English is dominating cyberspace with more than half of the other commonly used languages. Mirela (2023) cites that English represents 52,6 % of websites, whereas European Languages do not exceed 20% altogether. As shown in Figure 5 from the Web Technology Surveys, a closely scrutinized image of the percentages of websites using various languages reveals that "English is used by 49.2% of all websites whose content language is known" (W3Techs.com, 13 April 2025). Figure 5 gives a better vision of what is going on in the virtual space of languages, where English represents half of the online circulated data. Among the 249 recognized languages by Google Translate, being the top machine translation system (Bishop, 2025), English alone represents a leading group by its own. This hides that Google's translation machine model covers only 3.48% of the world's languages. About less than 0.1% of the web sites cover marginal languages. Privileged language pairings that exchange data through translation do not exceed 10%, let alone the thousands still absent from the online realm.

The number of texts translated from English into other languages reveals that close links are often to Western Languages. To translate between languages, other than English, translation should necessarily go through English since all machines of translation are pretrained to use English as reference point "for language combinations with English, the top three are Spanish (232), French (197), and German (152)" (Freelance Translator Survey 2020, 2020). The translation of other languages necessarily passes through English due to technical preprogrammed learning. According to the survey conducted by Inbox Translation, "language combinations between languages other than English, the top three languages are German (78), French (49), and Italian (38)" (Inbox Translation, 2020).

Figure 5
Percentages of Websites Using Various Content Languages



Source: W3Techs.com

This reflects not only a geopolitical disparity between countries but also an unevenness at the level of linguistic online representation. China, for example, just represents 1,1 % of website content, let alone other languages, which represent less than 0.1% of the websites despite the huge number of its users. Thousands of languages with millions of speakers are either underrepresented or not represented at all. To mention but a few, Mandarin, Hindi, and Arabic are still marginal despite the number of their speakers. Wilhelmina Nekoto and her colleagues' case study shows that African Languages are “ranging from “The Left Behinds” to “The Rising Stars”, with most languages not having any annotated data” (Nekoto et al., 2020, p. 2149).

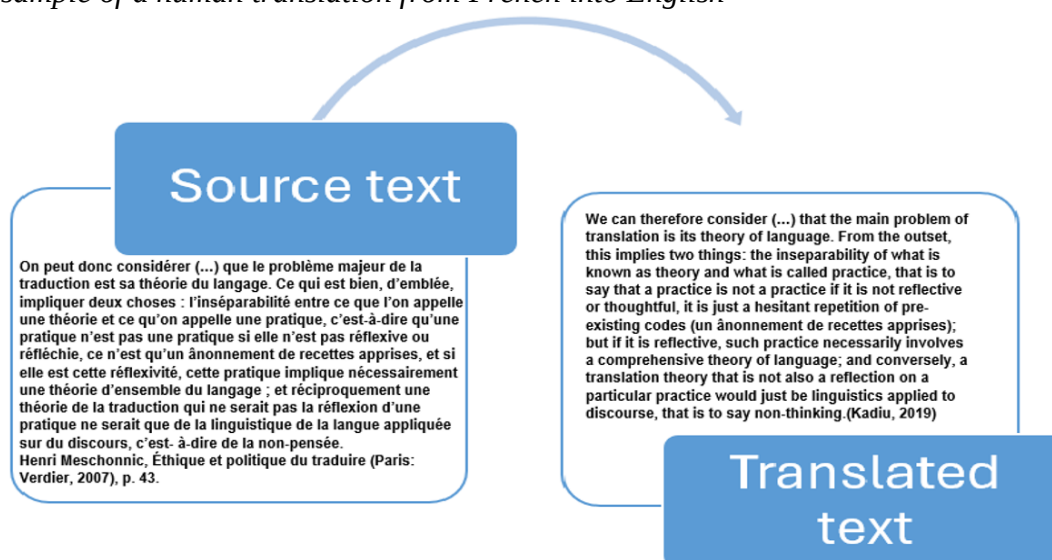
At the economic level, Mirela mentions that “According to Global Market Insights, the machine translation market was valued at close to USD 1 Billion in 2022 and is estimated to register a CAGR of nearly 23% between 2023 and 2032. The value projection for 2032 is a staggering USD 7.57 billion” (Mirela, 2023). According to the ELIS 2024 Report, “Translation technology continues to make its way throughout the entire industry. At the current pace, it is expected that by 2025 machine translation will be used in a majority of professional translation work” (ELIS, 2024). This suggests that the increasing reliance on MT and digital platforms has created a new class of linguistic workers whose labor is increasingly precarious and fragmented. More to the point, MT translation is further enhancing not only the dominance of a language over thousands of other languages, but also the economic hegemony of one monopoly over the rest of the world.

4.2.3. *The Claim of Accuracy*

Comparative linguistic analysis can be extended to provide further evidence with many platforms of MT covering translation in other languages. Silvia Kadiu, in her comparative study between human and machine translation, for instance, provides another sample of an excerpt translated from French into English first by Pier-Pascale Boulanger, then by her, and compares them with translations via three platforms, namely Google Translate (twice the first on the 1st of September 2014, the 2nd on the 20th of January 2015), Bablefish, and Dictionary.com, and comparing it to her own translation (Kadiu, 2019, pp.75-92). Figure 5 provides the French excerpt and its corresponding human translation by Silvia Kadiu.

Figure 6

A sample of a human translation from French into English



The comparative data, collected from Kadiu's excerpt, are presented in Table 2. Though the machine translation of various platforms in Kadiu's case study goes back to 2014 and may differ today because of the training and updates such platforms received, it further confirms the challenges they are facing. Kadiu recognized 9 common areas of linguistic errors in Google Translate and Babelfish, and 10 in Dictionary.com. She categorizes such difficulties under the heading of "Syntactical and lexical problems" (Kadiu, 2019, p.79).

Table 2

Linguistic Problems in Machine Translation

	Google Translate and Bablefish	Dictionary.com
Common Syntactical and lexical problems	1- "sa", should translate into "its" is translated "his" 2- the verb 'involve' is missing a grammatical subject 3- subject/complement reversal 4- failure of translating the word "ânonnement" into English 5- Verb choice "would" instead of "to be" 6- Errors with the definite article "the" 7- Passive voice instead of active voice	1- The personal pronoun "we" is replaced by "it" 2- The French word "discours" is translated "speech" 3- the French adverb 'bien' is translated as the English adjective 'good', and 'recette' is translated as 'revenue' instead of 'recipe'.

Being a translator myself, I conduct comparative studies between human and machine translation. Machine translation can assist human translators, but the final decision is left to them. My case study, with translation from English into Arabic or vice versa, extends to cover

further areas of study. My experience in translation shows that automated translation does not take into consideration both linguistic and pragmatic elements bound to each language. This is because each language has its own perception of the universe. Besides, each language is bound to sociocultural constraints that machine translation misses. The process of translation is sensitive to different cultures at the time of mobility of information between the target and source languages, since such a process entails intercultural communication. Data mobility that occurs inside the machine translation model consists of transforming letters into numbers, in other words, using the language of math and “leading most MT systems to perform poorly on cultural-centered translations in real-world deployment” (Yao et al., 2024, p. 11489).

Table 3 offers a practical example of how Google Translate misses many elements either linked to language or culture. A similar example can be extended to other online free platforms and AI translation engines. The suggested sample is taken from one of the books I translated a few years ago from English into Arabic. Few Arabic datasets are indeed available online, and we still lack updated dictionaries, chiefly specialized ones. The case of Arabic is one among many other underrepresented languages because it embeds a sophisticated grammatical framework and includes many cultural nuances. However, when it comes to translating a literary text, the job of machine translation seems to be almost senseless, full of many gaps, lacking meaning or clarity, or just giving deformed communication.

Table 3

Sample of Machine and Human Translation

Source language (English)	Target Language (Arabic)
“On the hillsides — birch trees so sickly, so impoverished, it’s as if the sun forgot about these orphans. On the slopes and slants — huckleberries, blueberries, lingonberries, braided into a soft green carpet flecked with multicoloured fruits. In the furrows, scoured by crosswinds- clumps of bog grass, sedge and cowslip.” (Sruoga, 2005)	Google Traslate (MT) على سفوح التلال، أشجار البتولا مريضة، فقيرة، كأن الشمس نسيت هؤلاء الأيتام. على المنحدرات والمنحدرات، توت العليق البري، والتوت الأزرق، والتوت البري، مضفرة في سجادة خضراء ناعمة مرصعة بفواكه متعددة الألوان. في الأخاديد، التي جرفتها الرياح العاتية - كتل من عشب المستنقعات، والحشائش، وزهرة البقر.
	My translation (Human Translation) سروغا، باليس. (2021). غابة الالهة (ترجمة، خالد حافظي). دار صفحة سبعة. بين المستنقعات والروابي والتلال، وعلى الكثبان الرملية المناسبة بين يدي قوة خارقة وأشجار الصنوبر العالية التي تشبه في نحولها الأجساد الهزيلة لطلاب المدارس، وعلى سفوح التلال حيث توجد أشجار البتولا العلية التعيسة، بدا المشهد كما لو أنّ الشمس تناست تلك الكائنات التي تشبه الأيتام. وعلى المنحدرات والمنحنيات بدت أشجار الكرز والتوت البري بمختلف أصنافها وألوانها، متشابكة مثل الجداول، مزدانة مثل سجادة خضراء ناعمة مليئة بالفواكه متعددة الألوان. وبين الأخاديد، التي تسَلَّت إليها الرياح العرضية، كانت هناك كتل من عشب المستنقعات، ونباتات السُّعَادَى والنرجس البري.

We can detect from the sample above many discrepancies between MT and HT attempts to translate the excerpt. Hence, better describe how Google Translate works. At a formal level, it is worth noting that MT is preprogrammed to keep the same structure and quantity of words. Respect for quantity is not paralleled by a respect for the quality of translation. The underlined words and clauses show many gaps gathered in Table 3. Absence of smoothness in translation, staying at the word-for-word level, and stumbling even at the literal translation seems to hinder Google Translate's performance. MT considers culture-bound items as nonexistent; the identity of the target language is lost because of the long use of prepositional clauses. Repetition of some lexical items and the lesser use of verbs, typical elements of the Arabic language, distort the meaning and lead to miscommunication, therefore, to a crisis of interpretation. Lack of cultural awareness of the Arabic Language, which tends to provide more linguistic details, and the under-equipment of MT in terms of grammatical and stylistic analysis create a barrier. Human translation takes into consideration such pitfalls and many more. The human translator is equipped, through what he acquired from his academic background and knowledge of the two languages, in addition to his experience and style in translation, with a thorough coverage of the communicative, smooth literary message that should be conveyed to the reader. I have proved in a previous article that there is a pragmatic dialogue and a “cooperative bargain” between the author of any text and its translator, and such a dialogue contributes to the enhancement of translation (Hafdh, 2023).

There are things that happen before translation, including reading about the author, his book, and his previous works, access to reliable specialized dictionaries, and knowledge of the source and target languages. I supplement such a process with my experience as an author who has decent practice in the field. For example, I know that the excerpt I included in Table 2 is from the beginning of the work, with a romantic style that precedes the terrible events that will happen later in the book. Comparative linguistic analysis of the sample in Table 3 is carried out in Table 4 to better see the nuances and the gaps that human translation won't fall into. Five areas of weakness are studied with the corresponding implications.

Table 4
Linguistic Pitfalls of Machine Translation

The Linguistic Pitfall	Description	Implication
Syntax and structural weakness	MT produces a text full of repetition, keeping the same punctuation and the same number of words. Complex sentences require that MT understands the hierarchy so that it will not miss meaning. MT does not capture subordination and coordination, so the logical link is missing.	Languages differ at the formal level. The economic character of English in many translated works is not paralleled with the rich details in Arabic. In most cases, human translation produces longer texts so that the many syntactic and structural elements are respected.
The Crisis of Context	MT is not aware of the context. The natural scene is described awkwardly. It provides scattered images without a coherent link. The repetition of the word «توت» and	The Arabic reader feels the alienation of the meaning. Coherence is absent, and the smooth link between elements of the natural scene is missing.

	some necessary verbs paints an unclear picture of what the author wants to convey. Besides, the historical context is not respected since the text dates back to WWII.	Pragmatic details inside the scene need further work so that a meaningful message can be conveyed.
Crisis of style	MT is not aware of the style of the author. Balys is a professor of drama, known for his harsh sarcasm, bitter criticism of the Nazi regime. The scene in question, despite being romantic mixed with sadness, is paving the way for a later description of the detention camp of Stutthof.	The calm opening is not endowed with a touch of human sadness that the author wants to convey. MT does not generate the intended literary style. To address such a challenge, MT needs more training in natural language handling.
Rhetorical limitations	MT encounters difficulty in the recognition of similes, metaphors, and hyperbole. The metaphorical representation of good and evil in the forest, the comparison of sick birches to orphans, and the exaggeration of colorful fruit are misrepresented by MT.	The element of bitter humor is missed. The sick memoirs of the camp, as described from outside, reflected in nature, in contrast between beauty and sickness, does not serve as a historical and biographical document.
Sociocultural misunderstanding	The described scene refers to precise geography and local scenery in what is known as the forest of God or the Nazi Stutthof concentration camp. MT does not process such a scene in its geographical, historical, and cultural context.	MT leaves the socio-cultural meaning scattered and undecidable, leaving it to the reader to decipher its context. The reader cannot determine the culture that serves as a background to the events inside the book.

Findings, gathered in Silvia Kadiu's case study or mine, demonstrate a weak translation by MT. The claim of accuracy and the low quality of MT is also confirmed by further studies that reached similar remarks (Calvo-Ferrer, 2023; Cambedda et al., 2021; Hidalgo-Ternero, 2020; Minervini, 2021; Papa & Tavosanis, 2020). My case study offers evidence from Arabic, which may inform trends in criticism of MT quality.

4.2.4. Machine Translation and Human Alienation

What MT offers, on the whole, is a linguistic service that aims to facilitate communication and the ease of data mobility. We are not in front of a process of pure translation, in the traditional sense, where socio-cultural and linguistic skills are used, but rather in front of an "output in terms of its usefulness for a particular purpose - not how 'good' the 'translation' is, but whether the essential message has been conveyed" (Hutchins, 2001). It can be argued that rapid and cost-effectiveness, even if the output is of low quality, is what matters for big translation companies. MT is filling the growing gap of the flow of data mobility in global communication.

The result is a distortion of communication as machines miss the professional touch of human translation. It is in this sense that Karl Marx drew our attention to the fact that the capitalist system's main zeal is “profit” and instrumentality at the expense of all that is human (Marx, 2018). The growing demand for MT in the translation industry is proof that the market will, step by step, get rid of human translators for the simple reason that the MT profile offers the advantage of speed, volume of data at a low cost, even at the expense of quality. MT is, therefore, a digital third-party mediator that can substitute a human translator and affect the labor market. Fears among language professionals and translators that MT is replacing them and that they may lose their jobs are real (Pym and Torres-Simón, 2021). In the long run, human translators will work as post editors after machine translation does their job, providing feedback and getting assistance from technological tools. Thus, they become alienated from the texts they translate, hence, displaced from the product of their labor (Ollman, 1976).

5. Discussion

If machine translation is designed to serve a noble cause, saving time and energy, and allowing a democratic equal distribution of information all over the world, why do we face such an ethical crisis? It seems that at a practical level, machine translation is transporting a hereditary dilemma, serving as a curse since the old days of Karl Marx up to now. Insights from substantial literature have discussed the appropriate and inappropriate practices, grievances, unfair representation, linguistic inaccuracies, pragmatic crisis, and human alienation. This paper raises concerns about the potential moral deviation that such tools may cause. While MT technologies provide access to larger markets and the appearance of improved production at a reduced cost (a type of “freedom” and democratization of movement inside the digital realm), they also lead to a “fettters” effect by increasing competition and putting lower pressure on translation rates. In addition, there are political, social, cultural, linguistic, and geographic ramifications. Hence, real-world disparities are transmitted to the ostensibly intelligent virtual environment. In the digital gig economy, human translators are essentially turning into a mobile proletariat (Marx), forced to accept lesser pay and more stringent deadlines to stay competitive. The entire technology process obscures the fact that what is actually taking place is a service provided by MT, which contributes to unequal mobility among different language classes.

Overall, MT provides a language service that seeks to make data mobility and communication easier. We are looking at an output in terms of its utility for a specific purpose, not how “valuable” the translation is, but whether the key message has been communicated. This is not a process of pure translation in the traditional sense, where socio-cultural and linguistic skills are used. One may ethically argue that for large translation agencies, speed and efficiency—even if the result is of poor quality—are what count.

6. Conclusion

Our paper's departure point is a tripartite historical summary of machine translation. An interplay of two bodies of theory was adopted to unveil both the paradox and crisis behind machine translation. While MT tools offer a semblance of increased productivity at a lower cost and access to wider markets (a form of “freedom” of access and movement within the digital sphere), they simultaneously contribute to downward pressure on translation rates and increased competition, creating a “fettters” effect. Human translators are increasingly alienated and compelled to accept lower rates and more demanding deadlines to remain competitive, effectively becoming a mobile proletariat within the digital gig economy. The whole technological process hides the reality that what is happening is a service given through the mediation of MT and contributing to an uneven mobilities between various classes of

languages. Two case studies confirm our claim that MT does not translate in the traditional sense of translation, given that the quality of output is weak, but rather offers distorted assistance lacking human post-editing touch.

John Urry's concern about uneven mobilities and Marx's critique of machinery served as a theoretical background because they converge in the context of cultural homogenization. MT systems often prioritize efficiency and cost effectiveness over cultural nuance, speed at the expense of quality, leading to crisis that may lead to the erosion of linguistic diversity and local particularities. The interplay of Urry's mobilities turn and Marx's critique of machinery underscores the need for ethical MT development. This includes addressing linguistic inequalities, working on accuracy, valuing human translators, and challenging exploitative labor practices. We can critically examine the social, economic, and cultural implications of MT. Concrete examples and evidence demonstrate the paradox of how MT both facilitates and complicates global communication, reinforcing inequalities while offering opportunities for resistance and ethical innovation. This critical perspective calls for a reimagining of MT as a tool that prioritizes equity, cultural diversity, and human agency.

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Social Movement Issues in Children's Nonfiction Discourse: Pragma-Linguistic Dimensions

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Abstract

Children's literature reflecting the main processes occurring in society is a powerful instrument for influencing and shaping children's mindsets and values. Children's nonfiction literature presents factual information on the real world in age-appropriate form to educate, inform, and entertain young readers. In recent years, this genre has increasingly incorporated elements of crisis discourse—such as environmental threats, global pandemics, social injustice, and political instability—aiming to raise awareness and build resilience among children in an ever-changing world. By introducing young readers to complex global challenges in an accessible way, nonfiction children's literature helps cultivate critical thinking, empathy, and a sense of responsibility. Pragma-linguistic dimensions of children's nonfiction discourse include all modes of language representation and are examined at the levels of micropragmatics, macropragmatics, and megapragmatics in our research. Social movement, as an effort to achieve a particular goal, can mount compelling challenges and cause positive social changes. The research on social movements falls into such vectors as scope, type of change, method of work, range, and time frame. The list of social movements includes artistic, political, revolutionary, religious/spiritual, environmental, equality and other movements. Social movement issues are introduced into children's nonfiction, considering readers' age, gender, and social specifics. They are mostly represented in the genres of biography and encyclopedia, both explicitly and implicitly. The pragma-linguistic dimensions of social movement issues in children's nonfiction discourse are studied through the scope of lexical and grammatical units, speech act theory, references, presuppositions, intentionality, communication strategies, empathy, register, atmosphere and tone of communication.

Keywords: social movement, children's literature, children's nonfiction discourse, pragma-linguistic dimensions

1. Introduction

Children's literature reflecting the main processes in society is a powerful instrument for influencing and shaping children's mindsets and values. Children's nonfiction literature presents factual information on the real world in age-appropriate form to educate, inform, and entertain young readers. Social movements, as a reflection of some social crises, are aimed to draw attention to some problems and solve it. Social movements are often introduced into children's nonfiction discourse. Pragma-linguistic dimensions of children's nonfiction discourse include all modes of language representation.

Children's nonfiction texts—including biographies and encyclopedias—play a crucial role in shaping how young readers understand the world and their place within it. By presenting real-life stories of individuals and groups advocating for change, such texts can instill values of justice, responsibility, and social engagement. Through both verbal and visual modes, these books often introduce children to key concepts such as environmental activism, educational

equality, gender justice, and anti-violence initiatives, encouraging them to reflect on societal structures and the potential for change.

Despite growing interest in this topic, the ways in which social movement issues are pragmatically actualized in children's nonfiction discourse remain under investigated. This study addresses that gap by examining the linguistic, visual, and structural strategies used to introduce social movements in contemporary English children's nonfiction discourse. By analyzing a corpus of children's biographies and encyclopedias, this research identifies the key topics, forms of activism, and pragmatic techniques employed to communicate complex social realities in a child-friendly manner.

This research sets out to achieve the following objectives:

- a. To construct a specific pragmatics-based categorization for analyzing social movement issues in children's nonfiction discourse.
- b. To give the definition for children's nonfiction discourse.
- c. To develop a novel and effective pragmatics-based algorithm for analyzing the actualization of social movement issues in children's nonfiction discourse.
- d. To identify the key vectors for topics, types, ways and stages of introducing social movements into children's nonfiction discourse.

Thus, children's nonfiction literature plays a vital role in shaping young readers' understanding of social issues by presenting social movements in an accessible and engaging way. This research lays the groundwork for a deeper exploration of the pragmatic strategies used to communicate these complex topics within contemporary children's nonfiction discourse.

2. Literature Review

This section details some of the recent and prominent approaches to the pragma-linguistic dimensions of social movement issues in children's nonfiction discourse. This section is divided into three subsections: the first considers some of the prominent approaches to social movement categorization; the second explores the approaches to children's nonfiction investigation; and the third outlines the main approaches for pragma-linguistic dimensions of this research.

2.1 Works on Social Movement Categorization

Social movements are typically understood as diverse extra-institutional forms of collective action maintaining some temporal continuity. Social movement theories conceptualize them as endogenous responses to perceived needs in order to seek or halt change (Snow et al., 2018). The categorization of social movements varies according to their expectations, predictions, and moral status, depending on formulations of collective action, progress, and mechanisms of change (Heydari, 2024).

Social movement, as an effort to achieve a particular goal, can mount compelling challenges and cause positive social changes. The research on social movements falls into such vectors as scope (reform or radical), type of change (innovation or conservative), targets (group or individual-focused), method of work (peaceful or violent), range (global or local), and time frame (old or new). The list of social movements includes artistic, independence, revolutionary, religious/spiritual, environmental, equality and other movements (Snow et al., 2004).

Social movements are aimed to make collective claims on different social issues and consist of three major elements as campaigns (a sustained, organized public effort making collective claims of target authorities), repertoire (presented by associations and coalitions, public meetings, vigils, rallies, demonstrations, statements in public media, etc.), and WUNC displays

(WUNC stands for worthiness, unity, numbers, and commitments on the part of participants' public representation) (Tilly, 2004).

Social movements are linked in their microcosms at three levels of analysis: the micro-level of the individual dispositions and skills that enable to protest practice; the meso-level of the mutual relations between movements; and the macro-level of the situation of the space of social movements within a differentiated social world (Mathieu, 2019; Caiani, 2023). A life cycle of social movements includes such stages: they are created, they grow, they achieve successes or failures, and they dissolve and cease to exist (Blumer, 1969; Mauss, 1975; Tilly, 1978).

Thus, social movements represent dynamic and multifaceted forms of collective action that seek to address, transform, or preserve social realities through sustained efforts. Their complex structures, varying goals, and evolving stages reflect broader societal mechanisms of change, resistance, and identity formation.

2.2 Works on Children's Nonfiction Discourse

There are many papers on both children's literature discourse and nonfiction discourse exploring these topics separately; the approaches to these two vectors of our research are applicable to the combined approach for investigation of children's nonfiction discourse. In tandem with the popularity of educational goals of children's literature, the topic of our research has increasingly become an area of interest for many studies (Hunt, 2004).

2.2.1 Works on Children's Literature Discourse

Key themes in the research of children's literature discourse include educational and entertaining issues, social values, stereotypes, rights, creativity, identity, gender and age peculiarities. Children's literature is "a foundation of shared intergenerational national and international culture, a barometer of beliefs and anxieties about children and childhood and a body of literature with its own genres, classic texts and avant-garde experiments" (Maybin & Watson, 2009, p. 1).

Children's literature is embedded in the language of its creation and shares its social history (Meek, 2004). Stories represented in children's books help children to sort out the world through reading, which now applies to such representational forms as pictures, maps, screens, design graphics and photographs — they are all regarded as text. Earlier children's attention was focused on the printed text, with sketches or pictures as an adjunct, but now reading includes a wider range of cognitive processes, including visual literacy, inferencing, critical thinking, and the ability to interpret multimodal elements such as images, layout, and design. Words and illustrations in modern children's books complement and enhance each other (Meek, 2004).

Children's literature discourse often touches on the topics of children's rights, children's social status, the social construction of childhood, and the role of literature in constructing and reinforcing or challenging these concepts. They are implicitly and explicitly represented through pictorial and lexical narratives, serving as a tool for challenging problematic hegemonic notions of children, childhoods, and rights (Pinsent, 2016).

Dominant (hegemonic) perspectives on children and childhood in children's literature touch on the topics of children's rights, their social status, and how childhood is socially constructed. When shaping, reinforcing, or challenging these ideas, children's literature communicates human rights messages to both children and adults. Pictorial and written narratives portray

children and their rights positively or negatively, questioning and disrupting harmful dominant views of childhood (Robichaud et al., 2019).

Children's literature is generally seen as literature aimed at children, reflecting their feelings, experiences, and perspectives on topics close to their world, such as family, animals, and nature. However, it is also recognized that many works considered as children's literature are enjoyed by both children and adults, and sometimes not originally intended solely for children (Gubar, 2011; Gultom & Setyami, 2022).

Thus, children's literature discourse explores themes such as education, entertainment, identity, rights, and the social construction of childhood. It serves not only as a cultural and ideological tool but also as a medium through which visual and verbal narratives shape, reinforce, or challenge dominant views about children.

2.2.2 Works on Nonfiction Discourse

Nonfiction literature discourse refers to written works that are based on real events, facts, and actual experiences rather than invented stories or characters. It encompasses a wide range of genres and is characterized by its focus on truth, factual accuracy, and the challenges of representing reality.

Nonfiction is defined as prose genres rooted in real events and facts, including biographies, memoirs, diaries, travel writing, essays, popular science, self-development, and reference works. The key feature is the emotional and intellectual impact achieved through the depiction of real reality, not fictional invention. Nonfiction discourse involves the ways nonfiction texts communicate, structure, and negotiate truth claims, often highlighting the complexities and ambiguities of establishing factual accuracy (Anderson, 1993; Jensen, 2023).

Typical features of nonfiction literature include the synthesis of documentary components and fiction, veracity, factuality, authenticity, objectivity, and the use of real names, dates and geographical indications. For all that, the reflection of real events and their participants is presented through the prism of the author's self, and therefore, subjectivity, personal component, and the merging of the images of the author and the narrator are added to the leading features of nonfiction literature (Cherkashyna & Paramonov, 2021).

Nonfiction discourse is featured by prioritizing factual accuracy, explicitness, and clarity, often employing structurally elaborate language such as complex noun phrases, subordinate clauses, and precise vocabulary to convey information and educate readers. At the same time, it may adapt features from other genres to enhance engagement and impact (Pérez-Llantada, 2021). Unlike fiction, nonfiction typically maintains an objective stance, focusing on content rather than interpersonal involvement (Root, 2003; Keisner, 2015).

Thus, nonfiction discourse is focused on conveying real events and factual information, emphasizing truth, authenticity, and clarity. It combines objective reporting with the author's subjective perspective, often blending documentary detail with narrative techniques to enhance engagement.

2.3 Works on Pragma-linguistics

2.3.1 Definitions of Pragma-linguistics

This subsection is devoted to the study of the pragma-linguistic aspects which are applicable to the study of children's nonfiction discourse. The discourse under analysis

constitutes a synergy of pragmatic characteristics of literary and popular science discourses in the context of children's perception and formation of reading competencies. Pragma-linguistics as a multidimensional phenomenon is represented by a wide range of problems related to all modes of language existence.

In the prominent works on linguistics, pragmatics is defined as “the study of human language use as it is exercised in a community of social practice” (Mey, 2006, p. 51); “the branch of linguistics that deals with language use in context” (Woensdregt & Smith, 2017); “a form of intention recognition that involves inferentially reconstructing the meaning that the speaker had in mind and wanted to convey, beyond the literal meaning of an utterance” (Papafragou, 2018, p. 168).

Mey (2006), considering pragma-linguistics as the study of human language use in a community of social practice, states that it is not limited to verbal signs: other communicative means are also included under the definition. The scholar emphasizes the way communication is organized, extending his approach to such disciplines as sociolinguistics, psycholinguistics, the study of humans in interaction with computers, the teaching of first and second languages, and a host of other practically and theoretically oriented fields of study. Woensdregt and Smith (2017) associate pragma-linguistics with the linguistic utterances that can have beyond their literal meaning (implicature) and presupposition, involving turn-taking in conversation. The authors come to the conclusion that pragmatics lies on the interface between language and social cognition. Papafragou (2018) defines pragmatics as a non-monolithic entity, a complex intention-recognition system that interfaces with both language and non-linguistic cognition. The author states precise, theoretically motivated connections between pragmatic mechanisms and semantic and cognitive mechanisms that underlie individual phenomena. Batsevyich (2011) defines the subject of linguistic pragmatics as the subjective factor in language, which includes both participants in communication and the relations between them, as well as subjective factors in language, such as the connotative components of lexical and grammatical means, which are determined by personal factors of communication, registers, tone of communication, etc.

2.3.2 Pragma-linguistics Categorization

Pragma-linguistics as a multifaceted phenomenon includes the communicative, cognitive and discursive stages of its actualization. Pragma-linguistic categorization involves the analysis of speech act, focusing on both the communicative intention of the speaker and the intention of the listener, as well as on the psychological state and social and ethnocultural belonging (Shevchenko, 2013).

Our research is based on the conception of pragma-linguistics developed by Batsevyich, who distinguishes the levels of micropragmatics, macropragmatics, and megapragmatics. *Micropragmatics* is considered from the point of view of focusing on linguistic units, in particular on the subjective factor of the semantic and pragmatic structure of lexical and grammatical units, as well as on the subjective aspects of the realization of reference, deixis, anaphora in English-language children's popular science publications. *Macropragmatics* is analyzed as a subjective factor related to speech acts, speech genres, discourses, implications and implicatures, presuppositions and modality in the studied discourse. *Megapragmatics* is covered in the work through the categories of interpersonal interaction, taking into account the pragmatic aspects of intentionality, strategies and tactics of communication; pragmatic aspects of the communicative competence of the participants in communication; categories with a clear manifestation of subjectivity: gaze, empathy and its focus; pragmatic aspects of the principles and maxims of communication, pragmatic manifestations of rhetorical factors of

communication, as well as such means of the language code as register, atmosphere and tone of communication (Batsevyeh, 2011).

Thus, pragma-linguistics explores how language functions in context, focusing on communication strategies, intentions, and social interactions. It combines linguistic, cognitive, and discursive aspects, particularly relevant in children's nonfiction discourse. This approach includes an analysis at the levels of micropragmatics, macropragmatics, and megapragmatic, addressing everything from word choice to broader communicative dynamics.

3. Methodology

The main goal of this research is to analyze the social movement issues in children's nonfiction discourse in English, using the approach concerning the unique pragmatic-based algorithm along with building a lexicon data dictionary. For the detection of pragma-linguistic features of social movement issues in children's nonfiction discourse from the plain text, we have divided the whole work into three parts.

3.1 Data Collection

The study draws on a diverse dataset comprising children's biographies and encyclopedias. These were selected for their explicit representation of real-life figures and social issues, with an emphasis on accessibility and engagement for a young readership. Textual and visual content is analyzed for pragma-linguistic markers such as thematic focus, ways and stages of introducing into the communicative act featuring social movement in children's nonfiction, as well as visual strategies like illustrations, placards, and symbolic representations of social engagement.

For this study, children's nonfiction books were used to collect examples featuring different types of social movement issues in children's nonfiction discourse. The examples were predominantly represented in children's biographies and encyclopedias in English. The biographies are presented in two main formats: thematic collections that compile the life stories of multiple notable figures around a central theme (such as inventors, leaders, or historical changemakers) and individual biographies that focus in-depth on a single character. These sources provide a diverse representation of how real-life figures are introduced to young readers and offer insight into the ways children's literature can shape perceptions of identity, history, and achievement.

Example of collections compiling a number of biographies is the series *Inspiring Lives* including the books *WildLives: 50 Extraordinary Animals that Made History* by Ben Lerwill & Sarah Walsh, *YouthQuake: 50 Children and Young People Who Shook the World* by Tom Adams & Sarah Walsh, *HerStory: 50 Women and Girls Who Shook the World* by Katherine Halligan & Sarah Walsh, *Great Britons: 50 Amazing People Who Have Called Britain Home* by Imogen Russell Williams & Sara Mulvanny. Another collection of biographies devoted to social change is *Old Enough to Save the Planet* by Loll Kirby. In these books, on each double-spread, there is a verbal text concerning one of 50 characters of the book, as well as a visual representation of the described character — their painted portrait, some pictures of their activities, and of the problem they are representing.

Individual biographies, focusing deeply on a single character and concerning social movement issues, are presented by such books as *I Am Malala: How One Girl Stood Up for Education and Changed the World (Young Readers Edition)* by Malala Yousafzai & Patricia McCormick, *I Am Malala: The Girl Who Stood Up for Education and Was Shot by the Taliban*

by Malala Yousafzai & Christina Lamb, *The Boy Who Harnessed the Wind: Creating Currents of Electricity and Hope (P.S.)* by William Kamkwamba and Bryan Mealer, *Born a Crime: Stories from a South African Childhood* by Trevor Noah, etc.

Children's encyclopedias considered in this research play a significant role in shaping children's understanding of the world. These encyclopedias are typically structured as informative reference books covering a wide range of topics—such as science, history, culture, etc.—presented in an accessible and engaging form for young readers. Often richly illustrated and designed to capture children's interest, these encyclopedias contribute to the formation of knowledge and values by selecting, organizing, and presenting information in specific ways. As such, they serve not only as educational tools but also as cultural products reflecting and potentially reinforcing certain social norms, ideologies, and representations of childhood in the form of social movements (Hisham, 2023).

Examples of encyclopedias include a series *Our Universe* by Stacy McAnulty, including the books *Earth! My First 4.54 Billion Years*, *Sun! One in a Billion*, *Moon! Earth's Best Friend*, and *Mars! Earthlings Welcome*, a series *All You Need to Know by Age 7*, including the books *All you need to know about Our World by age 7* by Alice James, *All you need to know about Your Body by age 7* by Alice James, *All the Science you need to know by age 7* by Katie Daynes, and separate books like *Eyewitness Encyclopedia of Everything* by Dorling Kindersley, *Earth is Big: A Book of Comparisons* by Steve Tomecek, *Discovering Architecture* by Berta Bardí i Milà, etc.

3.2 Research Method

The research process involved three analytical stages. First, lexicon-based approach allowed us to distinguish the main types of social movements presented in children's nonfiction (e.g., *protest*, *strike*, *campaign*). Second, textual analysis grounding on the lexicon and pragmatics-based algorithm revealed the main types of social movements represented in children's nonfiction, their structure and stages of introduction into the discourse under analysis. Third, multimodal analysis permits the investigation of visual representations of social movements in children's nonfiction in conjunction with verbal text and the understanding of how meaning is constructed and conveyed across modalities.

This comprehensive methodology enables a nuanced understanding of how nonfiction literature not only informs children about real-world social issues but also frames these issues through accessible and ideologically shaped narratives.

4. Research Findings and Discussion

4.1 Children's Nonfiction Discourse: Definition and Features

Based on the definitions in section 2, we can state that children's nonfiction discourse is a multifunctional unity that contains information about scientific facts, events and factors related to scientific realities, presented in an accessible and understandable form for children (Sanders, 2024). Children's nonfiction discourse is characterized by such features as age-appropriate language according to children's cognitive level; educational focus for informing, explaining, and fostering curiosity about the world; use of engaging tone and narrative elements to hold attention; visual and multimodal support such as images, charts, and bold formatting to aid comprehension; interactive elements: questions, tasks, fun facts, and prompts to involve young readers actively; clear structure and organization; positive and optimistic framing that emphasizes empowerment, hope, and discovery; cultural and ethical sensitivity to align with children's emotional development; frequent use of analogies and comparisons.

4.2 Pragmatic Manifestation of Social Movements in Children's Nonfiction

Children's social movements refer to organized or collective actions led by children or on behalf of children, aiming to promote social change, protect children's rights, or raise awareness about issues affecting young people. These movements may emerge independently from adult-led initiatives or operate alongside them, with children actively participating in advocacy, protest, dialogue, or educational campaigns.

4.2.1 Social Movement Thematic Focus

Social movement thematic focus revealed in children's nonfiction include environmental protection, education equality, anti-violence and anti-bullying, racial and gender justice, child labor and exploitation, and artistic issues:

Environmental protection. Social movements, focused on environmental protection, have become prominent forces for social change, uniting diverse groups to address issues like pollution, climate change, and environmental justice. This can be illustrated in:

Felix, from Germany, was concerned about the vast numbers of trees being cut down all over the world. When he was nine years old, he launched Plant for the Planet to get schoolchildren all around the world to join together and plant new trees in their own countries. His idea was so successful that a few years later, over a million trees had been planted in nearly one hundred different countries. (Kirby, 2021, p. 6)

Education equality. Social movements, focused on education equality, refer to collective efforts by individuals, groups, or organizations aimed at ensuring fair and just access to quality education for all. These movements seek to eliminate disparities caused by factors such as race, gender, income, disability, religion, or geography, and promote equal opportunities in education. This can be illustrated in:

Since I'd started speaking at events with my father to campaign for girls' education and against those like the Taliban who want to hide us away, journalists often came, even foreigners, though not like this in the road. (Yousafzai & Lamb, 2013, p. 10)

Anti-violence and anti-bullying. Social movements on anti-violence and anti-bullying are collective efforts aimed at preventing harmful behaviors such as physical, verbal, and psychological abuse, especially in schools and communities. This can be illustrated in:

The township was in a constant state of insurrection; someone was always marching or protesting somewhere and had to be suppressed. Playing in my grandmother's house, I'd hear gunshots, screams, tear gas being fired into crowds. (Noah, 2016, p. 49)

Racial and gender justice. Social movements for racial and gender justice have increasingly leveraged digital platforms, particularly social media, to amplify marginalized voices and build powerful networks of dissent. This can be illustrated in:

Then, Thandiwe helped set up KidsRightsYoungsters with other winners of the Children's Peace Prize. It's a movement that fights for rights, education, healthcare, gender equality and youth leadership for young people across the world. Today, Thandiwe is still campaigning and, thanks to her, many children now have brighter futures. (Adams & Walsh, 2020, p. 95)

Child labor and exploitation. Social movements against child labor and exploitation have focused on raising public awareness, advocating for legal reforms, and promoting access to education as key strategies to protect children's rights and break the cycle of poverty that drives child labor. This can be illustrated in:

Iqbal was now free, but he wanted to help his friends who were still in slavery. He started campaigning, speaking at demonstrations about his experiences and even sneaking into factories to talk to other slave children. He was such a passionate speaker, everyone listened, and soon articles about him started appearing in newspapers and magazines. (Adams & Walsh, 2020, p. 95)

Artistic issues. Social movements are a powerful tool for advocacy, identity formation, and social change in artistic issues. Throughout history, artists have used their work to comment on and influence political and social issues, amplifying marginalized voices and challenging dominant narratives. This can be illustrated in:

Art Nouveau or 'new art' was a late 19th century European style that valued craftsmanship and detail. The look varied from country to country but generally aimed to bring together art and crafts in architecture. Some of its pioneers were the architect Victor Horta and the painters Alphonse Mucha and Gustav Klimt. Art Nouveau architecture makes use of natural forms and curved lines. Its artistic style is also found in windows, sculpture, furniture, jewellery, lamps, prints and graphic design. It is considered to be an all-embracing style that creates a welcoming environment. (Bardí, 2019, p. 24)

4.2.2 Types of Social Movement Activism

Social movements, represented in children's nonfiction, are embodied in different forms of activism aimed at promoting justice, raising awareness, and inspiring change in society. The analysis of the data revealed such types of social movement activism in children's nonfiction as campaigns, marches, sit-ins/die-ins, walkouts, vigils/memorials, rallies/speeches, letter-writing/petitions, boycotts, strikes, voting activism, social media activism, street art, craftivism, and mutual aid. Here are some examples:

So, yes, the Taliban shot me. But they can only shoot a body. They cannot kill my beliefs, and they cannot stop my **campaign** to see every child in school. I am still here for a reason, and it is to use my life to help people. (Yousafzai & McCormick, 2016, p. 149)

He'd just returned from a **rally** in the trading center called by the opposition Malawi Congress Party, the party of President Banda, Farmer Number One. Hundreds had attended, and the opposition officials had stood on the stage and delivered a boiling **speech** over a PA system. Some of President Muluzi's thugs—called the Young Democrats—had tried to stop the **rally**, but farmers from the villages stood guard around the stage and let the opposition **speak**. (Kamkwamba & Mealer, 2016, p. 71)

In May that year, students and teachers in Soweto went on **strike** to **protest** about the changes. They planned a **demonstration march** on 16 June. Although Hector was only 12, he wanted to join his older sister Antoinette on the **march**. (Adams & Walsh, 2020, p. 89)

Hector has never been forgotten in South Africa. There is a **memorial** and **museum** in his name and every June, on the **anniversary** of his death, the country celebrates **Youth Day**. It's a day for South Africans to be reminded of their past, while looking to their future. (Adams & Walsh, 2020, p. 89)

The **Walk** for Peace was much bigger than Mayra's first **demonstration**, and it sent a strong message to the rest of the country. She started organizing regular neighbourhood **meetings** to get people working together and, slowly, as community spirit grew, people in the favela realized change was possible. (Adams & Walsh, 2020, p. 101)

4.2.3 Ways of Introducing Social Movements

Ways of introducing social movement issues into children's nonfiction discourse are: nomination of social movement type, proper naming of social movement, slogan of a particular social movement, quotation by the leaders of social movement, visual representation of social movement. The nomination of social movement type includes the terms naming the types of social movements. (e.g., *demonstration*, *strike*, *campaign*). Proper naming of social movement includes specific names of social movements. Usually they are capitalized (e.g., *Plant for the Planet*,) and joined-up writing in one word (e.g., *FridaysForFuture*, *HeForShe*).

When he was nine years old, he launched ***Plant for the Planet*** to get schoolchildren all around the world to join together and plant new trees in their own countries. (Kirby, 2021, p. 6)

She's started a ***FridaysForFuture*** movement, and children across the world are going on strike every Friday. (Adams & Walsh, 2020, p. 31)

The UN is an international association of countries that works to improve conditions for people everywhere. Their '***HeForShe***' campaign called for men and women to be treated equally and the UN wanted Emma to help spread the message. (Adams & Walsh, 2020, p. 31)

The slogan of a particular social movement plays a central role in social movements, encapsulating demands, identities, and emotions in concise, memorable phrases that can mobilize supporters and communicate with broader audiences (e.g., *There is no planet B; Light up one house at a time*).

The visual representation of Greta Thunberg's slogan as a component of the cover illustrations in children's nonfiction is presented in Table 1.

Table 1

Visual Representation of Greta Thunberg's Slogan "There is No Planet B" in Children's Nonfiction

Source	Visual representation
<i>Old Enough to Save the Planet</i> by Loll Kirby (2021)	
<i>YouthQuake: 50 Children and Young People Who Shook the World</i> by Tom Adams and Sarah Walsh (2020)	

Quotations by the leaders of social movements inspire, mobilize, and give voice to shared values and goals; they often become symbolic and capture the essence of a movement's purpose in a powerful and memorable way:

Greta Thunberg: *"You say you love your children above all else, and yet you are stealing their future in front of their very eyes"*. (Adams & Walsh, 2020, p. 101)

Emma Watson: *"Girls should never be afraid to be smart"*. (Adams & Walsh, 2020, p. 31)

Malala: *"To all the girls who have faced injustice and been silenced. Together we will be heard"*. (Adams & Walsh, 2020, p. 53)

The visual representation of social movement is crucial for communication, engagement, and impact. It is represented by illustrations in the form of placards pictures or pictures from the place of the event.

Table 2

Greta Thunberg's Slogan "There is No Planet B" in Children's Nonfiction

Topic	Verbal representation	Visual representation
Environmental protection	Amy and Ella explain how a reusable bottle is so much better than a plastic one. (Kirby, 2021, p. 11)	
Rights equality	Emma on a talk show discussing her role as UN Women Goodwill Ambassador. (Adams & Walsh, 2020, p. 31)	
Child labor and exploitation	A young Iqbal (top) and the special group, named the Bonded Labour Liberation Front, who campaign against slavery and who helped Iqbal return to school (bottom). (Adams & Walsh, 2020, p. 95)	

4.2.4 Structure of Social Movement Representation

Social movement representation in children's nonfiction is a complex process consisting of the following stages: a. stating the reason for social movement (internal or external); b. naming the type, name, and aim of social movement; c. informing about the reaction and results (achieved intentions, in process, or ignored/failed). Table 3 shows the stages of Boyan Slat's social movement manifestation in the book *YouthQuake: 50 Children and Young People Who Shook the World* by Tom Adams and Sarah Walsh).

Table 3

Stages of Boyan Slat's Social Movement Introducing into the Book "YouthQuake: 50 Children and Young People Who Shook the World" by Tom Adams and Sarah Walsh (2020)

Stage	Example
Stating the reason for social movement	When Boyan was 16, he went on holiday to Greece and had an idea that would change his life. One day, he went diving in the sea. Instead of discovering a magical underwater world, he saw masses of floating plastic bags and bottles. The sea was just a rubbish dump.

Naming the type, name, and aim of social movement	In 2013, he founded <i>Ocean Cleanup</i> and, together with scientists and researchers, he began to spread the word about his plan. Finally, with enough money raised, he built <i>a test version of his invention and in December 2018, a 2000-foot-long barrier called System 001</i> was launched into the Pacific Ocean.
Informing about the reaction and results (achieved intentions, in process, or ignored)	<i>It was a success . . . mostly.</i> It soon began trapping floating plastic; however, it didn't work perfectly straight away. <i>But Boyan did not give up</i> on his ocean clean-up. One year later, it started successfully picking up plastic and soon he hopes to build a fleet of 60 even bigger barriers. In five years, he believes his ambitious invention can reduce the size of the Great Pacific Garbage Patch by half, cleaning up the seas and saving a huge amount of marine life.

In this case, the reason for social movement is that the character “*saw masses of floating plastic bags and bottles. The sea was just a rubbish dump*”. The name of social movement here is “*Ocean Cleanup*”, and it is accompanied by the explanation “*a test version of his invention and in December 2018, a 2000-foot-long barrier called System 001*” (Adams & Walsh, 2020, p. 21). The result of the social movement is expressed by the words “*It was a success . . . mostly*” and “*But Boyan did not give up*” (Adams & Walsh, 2020, p. 21).

Thus, the structure of introducing social movements in children's nonfiction follows a clear narrative sequence: identifying the motives, naming and defining the movement, and reporting the outcomes. This staged approach helps young readers understand both the cause and effect of activism, reinforcing the message of perseverance and impact.

5. Conclusion

The conducted research has revealed that children's nonfiction discourse serves as an effective medium for the introducing social movement issues to young readers. Based on the analysis of children's biographies, encyclopedias, and nonfiction collections in English, it was determined that social movements are actualized through specific pragma-linguistic and multimodal strategies tailored to children's cognitive and emotional levels. These include thematic focus, types and stages of introducing, lexical markers, visual illustrations, slogans, and quotations by social movement leaders.

The study identified key vectors of how social movements are represented in children's nonfiction: thematically (environmental protection, education equality, anti-violence, racial and gender justice, child labor, and artistic movements); structurally (through the stages of stating the reason, naming the type, and presenting results); and multimodally (via visual and verbal representation, including slogans and placards). Moreover, the pragmatic algorithm constructed in this research allowed for a concise analysis of the ways these movements are introduced and framed.

Thus, children's nonfiction literature not only informs young audiences about real-life social issues but also creates ideologically shaped narratives that foster awareness, responsibility, and engagement with global and local challenges. The integration of pragmatic, lexical, and visual elements ensures that complex topics are communicated in an accessible and

developmentally appropriate way, contributing to children's understanding of social activism and their role in it.

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Coverage of the Russian-Ukrainian War in English Media Texts

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Abstract

The present paper highlights the study results on the presentation of war against Ukraine in English newspaper texts. This article aims to identify the main factors (sociocultural and language) affecting the depiction of war in newspaper texts. The issues of war and peace today are especially significant for the Ukrainian state in the conditions of a full-scale Russian invasion. The phenomenon of war in the sociocultural aspect is inseparably linked with one of the principal concepts of the collective, mass, national, worldview, "own versus foreign". All human culture is permeated by this antithesis in its various forms and is unconsciously reflected in language. War is a socio-political phenomenon, which is one of the resolution forms of socio-political, economic, ideological, national, territorial, religious and other contradictions between states, peoples, nations, classes, and social groups using armed violence. War is a continuation of politics by violent means and is associated with a change in relations between political subjects. The comprehensive consideration of the specifics of the functioning of different language units as a means of conveying the real attitude to Ukraine and the resources of its image creation in the texts of the English media is appropriate, as it contributes to an understanding of the design features of the media picture of reality through the prism of different verbal items. It has been proven that communication conditions determine stylistic means employed in the newspaper texts. If the speaker desires to rouse the audience and to keep it in suspense, he will resort to different tropes and figures of speech. The most frequently used are: epithets, similes, metaphors, parallel constructions, inversion, and antithesis. Moreover, stylistic means are closely interwoven and mutually complementary, thus building up a complex pattern.

Keywords: war, context, worldview, media, tropes, figures of speech

1. Introduction

In recent decades, the mass media have turned from a simple information channel into an important participant in the internal and external life of all countries of the world, including Ukraine. Mass communication plays a vital role in establishing relationships and communication. Without mass communication, it is difficult to imagine what the world would look like today. Even in the most remote and third countries of the world, such communications are an integral part of existence.

In the era of modern total informatization of society, media discourse acquires an international character, accumulating social and cultural-historical memory of specific world

languages. It is well known that we learn all the information about the surrounding world and society through mass information, which, at the same time, we distrust and do not exclude the possibility of manipulation.

Today, the image of Ukraine is an essential phenomenon in the modern world due to the full-scale war started by Russia. Russia's armed aggression against Ukraine has significantly changed the media space not only of Ukraine but also of the whole world. The war against Ukraine has been going on for more than ten years. Today, it is the longest war in Europe after the Second World War.

The topicality of this study is determined by the fact that the phenomenon of war is viewed in the light of social and cultural studies of media texts. It must be noted that the approaches to considering war and its evaluation are formed based on sociocultural stereotypes. Estimating a particular object, the speaker relies on the one hand, on his attitude toward it, and on the other hand, on stereotypes about this object and its place in the world view of values. The subject of the discussion is the presentation of the war against Ukraine in English newspaper texts.

2. Literature Review

Mass communication is a way to contact many people, sometimes over great distances (Boyd-Barrett, 2020; Yaremchuk, 2015). According to the traditional conception, mass communication is a component system consisting of senders who transmit messages through media channels to a large group of people with some chance of feedback (Littlejohn, 2008; McQuail, 2009; Rozenfeld, 2023). The media play a central role in informing the public about what is happening in the world, especially in areas in which the audience has no direct knowledge or experience. The effect of this process can be the formation of public opinion, the adoption of a particular cultural value, the establishment of an agenda for society, etc. The specificity of media discourse lies in its orientation towards a mass addressee (Pravdová, 2017; Vivian, 2012).

It is common knowledge that the most universal platforms for mass media are newspapers, magazines, radio, television, and the Internet. The newspaper increases and enlarges the general knowledge of the people (Gáliková-Tolnaiová, 2019; Škripcová, 2017). Newspapers are considered to be the source of information which is highly genuine, compelling and successful in providing timely information to the audience (Hudíková, 2017). Another attractive quality and value of the newspaper is that it presents wide-ranging material that is not available on any other media resource.

One of the significant factors affecting the perception of any country is its image, formed by mass media in the public consciousness of its audience (Coleman & Ross, 2010; Hrytsenko & Shklyar, 2000). The formation of the country's image in the media originates through informing the public about political situations, the activities of states and their leaders, and influential political figures. Mass media becomes like a 'connecting thread' between the state and its citizens.

3. Methodology

This article aims to identify the main factors (sociocultural and language) that affect the representation of war in the newspaper text and determine one or another of its evaluative signs. The material for analysis was a selection of approximately 300 fragments of Ukrainian and English newspaper texts. The selection criteria were the existence of the nomination (direct or indirect) of war in the fragments.

Methodology is determined by the objectives, the material, and the theoretical framework of the paper. It incorporates the main principles of the cognitive theory and pragmalinguistics. The methodology employed in the study is based on the essential points of linguoculturology (Kolesnyk, 2014; Marchuk, 2015), sociolinguistics (Danesi, 2016; Masenko, 2010), Evaluation theory (Ananko, 2017; Myroniuk, 2017; Prykhodko, 2016), and the Theory of Context (Kecskes, 2013; Van Dijk, 2009), which present basic ideas for the linguistic analysis. This research involves a variety of methods. A descriptive method, by which we mean a set of research techniques that allow one to move from particular observations to generalizations, and conclusions are widely used; method of contextual analysis, allowing to detect the influence of the role structure of the communication situation, social factors on the communicative semantics and functional features of utterances with words and phrases used to nominate war. War is usually defined as a situation in which two or more countries or groups of people fight against each other over some time (Oxford Learner's Dictionaries).

Our paper is structured as follows: firstly, we will present the theoretical description of war in linguistics in general. Then, we will report briefly on the results of some previous works dealing with analyzing the war in the light of social and cultural studies of journalistic texts. Finally, we will explain and comment on our findings concerning the specificity of the war phenomenon presented in English newspapers before making final observations and suggestions for future investigation.

4. Findings and Discussion

4.1 Concept 'WAR' in Linguistics

Times of war raise the question of understanding the essence of war and peace. The phenomena of war and peace constitute the life experience of any society. These are complex socio-political phenomena associated with the resolution of contradictions between states, peoples, national and social groups, with the transition to the use of armed struggle, which takes place in the form of hostilities between their armed forces.

In modern scientific theory, war is defined as a special form of revealing social relations, in which armed struggle reigns as a continuation of politics, subordinating all areas of social life to its goals. Unsurprisingly, interest in the phenomena of war and peace has not faded since ancient times. The phenomenon of war in the sociocultural aspect is inseparably linked with one of the principal concepts of the collective, mass, national, and national worldview, "own versus foreign". All human culture is permeated by this antithesis in its various forms and is unconsciously reflected in language. This concept defines both the historical past of Ukraine and the political present (Bulyk-Verkhola, 2022; Kondratenko, 2017; Vasyanovych, 2020).

At the current stage of humanitarian knowledge, the term "concept" is one of the most widely used and at the same time controversial in linguistics, cultural studies, philosophy and psychology. Each of these sciences has its definition of this notion. This is due to many differences in the understanding of the term "concept" and its primary importance in the worldview of scientific studies.

In philology a concept is the meaningful side of a verbal sign, behind which there is a notion that refers to the mental, spiritual or material sphere of human existence, fixed in the social experience of the people, has historical roots in its life, socially and subjectively interpreted and due to the degree of such perception correlates with other notions that are related to it or, in many cases, opposed to it (Prykhodko, 2016).

In cognitive science, a concept is perceived as a unit of mental activity that is constantly undergoing changes. Its scope, for example, may include additional background concepts, the

standard set of situations may change, and a single component in the content may be more mobile. The concept is realized in a verbal sign and language in general, and the core of the concept is the combined language and speech semantics of words (Evans, 2009; Garbera, 2014; Zagnitko, 2010).

Today, two main approaches to the study of the notion of ‘concept’ in modern linguistic science have been distinguished: cognitive and linguo-cultural. Common to these approaches is the assertion of an unquestionable connection between language and culture; the disagreement is caused by different views of the role of language in forming the concept (Selivanova, 2006). A concept is a unit at the cognitive level. The concept consists of three components: nominative, figurative and evaluative (Prykhodko, 2008). Unlike a notion, a concept is not only thought but also experienced. Its content is wider than the content of the concept.

As one of the central notions of linguistic and cultural studies, the concept has many interpretations and definitions. The linguocultural concept has a wide range of means of verbalization, which enables the reconstruction of the value picture of the world of a specific national-ethnic community. In communication, the concept can be presented both verbally and non-verbally. The inner form, the core and the actual layer make up the structure of the concept.

The concept “war” is a socio-political phenomenon, which is one of the resolution forms of socio-political, economic, ideological, national, territorial, religious and other contradictions between states, peoples, nations, classes, social groups by means of armed violence. War is a continuation of politics by violent means and is associated with a change in relations between political subjects (Pylyavets, 2005).

So, war is a multifaceted phenomenon. This is not only an armed struggle between states, peoples, tribes, etc., but also – in a secondary, more general sense – it is a struggle to achieve one’s goals by any means of influence. Both meanings are based on the presuppositional terms ‘contradiction’ and ‘confrontation’ (Blyznyuk & Skidchenko, 2022; Ogar, 2019).

The secondary metaphorical senses of this notion are related to various situations: for example, economic or ideological contradictions, situations of struggle of varying degrees of sharpness and tension for political power in any organization, party or country, up to the struggle of an individual with himself. In any case, the confrontation is determined by the goal of achieving supremacy and dominance, on the one hand, and to preserve independence, the right to manage oneself, one’s own country in all its life’s constituents, at one’s discretion, on the other hand.

The worldview of the military sphere in any culture has its sense and set of concepts. Thus, the linguocultural concept “war” refers to universal concepts, as it is present in all cultures and languages, and therefore has a wide range of related notions that are correlatives. The linguistic and cultural concept of “war” determines the existence and regulates everyday life, down to the most banal details. Such concepts structure how information about the surrounding world is perceived and understood. Therefore, a specific conceptual system is central in defining everyday reality.

In our research, we understand the concept as a semantic formation marked by linguocultural specificity and which characterizes the bearers of a certain ethnoculture, at the same time, this formation is the result of the mental (cognitive) activity of a person and society and determines the attitude of public consciousness to a given phenomenon or item of objective reality.

4.2 Historical and Social Context of the Russian-Ukrainian Wars

For a long time, it was thought that war would bypass Ukrainian land in the 21st century that people would never hear the whistling of bullets, explosions of grenades and shells on the streets of their cities and villages, and civilians would not be blown up by mines. Hope did not come true; armed conflict knocked on their door. The Russian military invasion of Ukraine, first the annexation of Crimea, then the hybrid war in Donbas, and since February 24, 2022, the full-scale invasion, which continues to this day in violation of the norms of international law, has become a vivid historical precedent in the modern world.

It is important to note that Ukraine was rarely mentioned until February 24, 2022. It seemed that it did not exist, as an independent subject of social and historical processes, and not just a territory, in the minds of some researchers in history, political science and international relations. The Russian invasion changed a lot in this sense as well. According to some scientists, it is easier to understand the current Ukrainian tragedy, analyze the course of the bloody war, which has been going on for more than three years, and the prospects for its outcome, if you put it in the context of the new “cold war” (Ofitsynskyi, 2018).

This war radically changed not only the lives of Ukrainian citizens, causing numerous victims among peaceful citizens, forcing millions of Ukrainians to become refugees, but also prompted society to rebuild its work in wartime conditions. The war presented Ukraine with fundamentally new and modern problems in the field of national security. It pushed the state to think about the specific features of its strategic culture, made it realize and understand the requirements of “formulating a grand strategy for the state, which involves, first of all, the restoration of the territorial integrity of Ukraine, the determination of internal and external means of achieving this goal with a long-term projection of the conditions of future peace after victory” (Parakhonskyi & Yavorska, 2019).

War as a social phenomenon has two dialectically related sides: socio-political and military-technical. The first finds out who is conducting military operations and, in the name of what, the second represents the material and human resources that are used in the war. The content of the war remains unchanged: despite all the variety of theories of the origin of the war, it was and remains a battle for the change and redistribution of social roles in the course of the development of society (Trebin, 2015). The war also kept its essence unshakable: a manifestation of the will that directs efforts through only armed struggle.

It should be noted that this Russian-Ukrainian war is the first in the history of mankind which takes place during the period of the existence of social networks, mobile phones from which you can control satellites, from which you can see everything on the ground, combat drones and other technological components of modern civilization. This is an entirely new kind of war, unlike any before, and what awaits these and future aggressors—should they emerge after Russia’s inevitable defeat—is powerfully demonstrated by today’s events.

The above-mentioned confirms the urgent need to study the phenomenon of war from a broad perspective because such researches fully reveal not only the social but also the linguistic significance of this notion.

4.3 Specific Features of Concept WAR’s Representation in American and British Media

This part presents a general overview of the presentation of war as described in American and British newspapers. The sign of evaluation of war in the media may be conditioned by various sociocultural factors, among which are the specifics of the sociocultural space (in particular, the historical epoch, ideological and political changes in society, its cultural

stereotypes), type of publication (first and foremost its political orientation), genre specificity of the text, individual features of communicants' worldview.

It should be noted that British and American media traditionally clarify events. However, with regard to events unfolding in their own country, having a national scale, it is difficult to talk about objectivity as such. On the one hand, the media makes every effort to provide reliable, trustworthy and objective information; on the other hand, it transfers specific values. Thus, the information presented in the media is seldom neutral; it always carries a definite appraisal. Even in this case, the British American media value their reputation and try to deliver objective information to the reader.

The study of the depiction of war is carried out on the traditionally distinguished quality press in Britain and the USA: *The Guardian*, *New York Post*, *The Times*, *The Guardian USA*, *The Washington Post*, *The Wall Street Journal*, *Morning Star*. The motive for choosing these media is the objective character of analyzing and interpreting the war in Ukraine.

At first, it must be noted that what is essential for the life of society at a definite period has a high nominative density and concentration in the language worldview. In addition, the process of accepting and understanding reality by the cognizing subject is accompanied by an emotional and evaluative awareness of what is happening, while what is essential is estimated. This testifies to the fact that the higher the axiological potential of a word is, the more significant is the role of a given phenomenon in society.

This can be fully applied to the coverage of the war in Ukraine, which has become the topic number one in most Western media. Here is an example of a negative evaluative judgement, which proves the American people's genuine attitude to Russia's aggression:

Putin has chosen a premeditated war that will bring a catastrophic loss of life and human suffering. Russia alone is responsible for the death and destruction this attack will bring, and the United States and its allies and partners will respond in a united and decisive way. The world will hold Russia accountable. (New York Post, 2022, February 24)

The negative tone in the above statement is formed due to the usage of expressions "premeditated war", "catastrophic loss", "human suffering", which include lexemes with a negative evaluation ("war", "loss", "suffering") (Ananko, 2017). The last sentence, which contains a metaphor, reinforces the condemnation of the country-terrorist.

The following example also deserves to be considered:

The president's address concluded one of Nato's most significant meetings, the alliance having been revitalized and transformed by Russia's unprovoked invasion of Ukraine in February. (The Guardian, 2022, July 1)

Support for Ukraine, which is mentioned in Joe Biden's speech, is explained by the word "significant" and the attributive expressions "revitalized" and "transformed", which contain a positive assessment. At the same time, this fragment can serve as an example of a negative evaluation of the Russian assault, as evidenced by using the lexeme "invasion".

The following fragment depicts offences committed by Russia on the territory of Ukraine:

New York Times journalists risked their lives daily, narrowly escaping Russian fire, to document the atrocities of the war. They proved, with video evidence, Russia's most gruesome war crimes, and they pierced Vladimir Putin's inner circle and obtained his army's secret plans. (The New York Times, 2023, September 26)

The words “atrocities”, “gruesome”, “crimes” with negative senses describe all murderous deeds of Russia and are markers of terrorists’ conviction.

The following example demonstrates the continued aid and encouragement of Ukraine. It is even expanding due to the permission to fire Russia:

Secretary of State Antony Blinken on Friday opened the door to allowing Ukraine to fire U.S.-provided weapons deeper into Russian territory, just a day after President Biden, in a major policy shift, okayed counterattacks aimed at limited Russian military targets across the border.

Self-defense is not escalation. Self-defense is a fundamental right,” he said. “We have the right to help Ukraine.” (The Washington Post, 2024, May 31)

Within this context, the positive emotional tone is created by means of the metaphor “opened the door to allowing” antitheses, which is grounded on parallelism. The words “self-defense” and “okayed” with positive meaning add to the affirmation of backing of the Ukrainian country. The indication of speakers’ high positions “Secretary of State”, “President” and the amount of time described by the phrase “just a day after” underline the encouraging mood of the USA in the desire to help Ukraine.

It should be noted that the support of Ukraine is clearly stated in Communiqué of Peace Summit:

The final document signed by 78 countries said the U.N. Charter and “respect for territorial integrity and sovereignty can and will serve as a basis for achieving a comprehensive, just and lasting peace in Ukraine.” That has been a nonstarter for Putin, who wants Ukraine to cede more territory and back away from its hopes of joining the NATO military alliance. (The Washington Post, 2024, June 16)

The usage of the phrase “respect for territorial integrity and sovereignty” due to the words having positive meanings corroborates the assistance and help of the Ukrainian country by the world. At the same time, the lexeme “nonstarter” serves in this context as a warning for Putin because of his aggressive policy.

Today, the country cannot exist in complete isolation without communication with other states at various levels; therefore, the country’s image is gaining special attention and significance (Hraban, 2019; Osmolovska, 2018). The image of the country is a historical phenomenon that spreads in time, back into the mythological past, and forward into the imagined future. The more people understand their history, the stronger the image of the country will be. Wars between peoples also shape the images of countries, as well as their geographical location.

The context below also illustrates the aggressive nature of the war against Ukraine. First, it is an ironic phrase, “special military operation”, which testifies to Putin’s true intentions. The comparison of war with the territorial encroachments of the aggressor, who identifies himself with the king, intensifies the invasive nature of this military conflict:

But mainly the Russian president defended the “special military operation”– his preferred term for what he openly admitted was a Russian war of conquest that he compared with the territorial ambitions of former Russian tsars. (The Guardian USA, 2022, December 8)

Let us analyze another example, which is a bright illustration of a negative attitude towards the country-aggressor:

Fleming added that the Russian command and control structure was in chaos, while the invasion of Ukraine had descended into Putin's "personal war." (New York Post, 2022, April 1)

The negative image here is formed due to the use of lexemes with a negative connotation ("chaos", "invasion"). The ironic expression "*personal war*" reinforces the negative appearance of the country-terrorist.

Journalistic style is characterized by the highest level of speech openness. Its characteristic feature is stylistic versatility and resourcefulness, "fusion of elevated and low, old and new, permitted and forbidden, official and informal, public and everyday, oral and written communication" (Panashenko & Greguš, 2022). The display of these properties results from a constant search for new means of manifestation. In accordance with his communicative aim, the author of the text chooses language units owning the required subject-logical and connotative meaning, and arranges statements in such a way as to establish the required pragmatic contacts between them (Prihodko & Prykhodchenko, 2018). As a result, an effect of directed impact on the addressee is formed.

Stylistic figures are created as a pragmatically motivated deviation from the norm. The most frequently used tropes in British media should be mentioned. The study of the newspaper articles revealed that the epithet is widely used as a means of descriptiveness:

The aim of the EU programme is that "Ukraine can independently conduct combat operations to defend territorial integrity and sovereignty. The successful counteroffensive of the Ukrainian armed forces on several fronts is encouraging, but it does not yet mark a turning point," the leaked paper said. "Ukraine's needs exceed its current capabilities." (The Times, 2022, October 10)

Epithets expressed by adjectives, the semantic structure of which contains semes of positive appraisal ("independently", "successful"), play a significant role in the formation of Ukraine's image. The positive image of the Ukrainian country is emphasized by the EU's belief in the ability of the Ukrainian armed forces to defend Ukrainian independence and freedom. This is actualized by the lexemes "to defend" and "counteroffensive", which can be qualified as examples of "victorious" lexis, as well as the expressive lexemes "integrity" and "sovereignty", which are characterized by positive evaluative semantics.

Another trope that occurs in English and American newspapers is the simile. The most essential mark of simile is an element of unexpectedness, newness, and freshness:

"The prime minister told other world leaders that, despite a deteriorating global economy, countries such as Britain had to fulfil their financial commitments to help developing nations decarbonize. He added that since Russia's invasion of Ukraine, "climate security" went "hand in hand with energy security", with an ever greater need to invest in renewable sources. "Putin's abhorrent war in Ukraine and rising energy prices across the world are not a reason to go slow on climate change," he said. (The Times, 2022, November 8)

This fragment demonstrates that Great Britain is also supporting and will support Ukraine. Prime Minister Rishi Sunak's speech confirms unwavering support for Ukraine, despite the deterioration of the economy, which is represented by the adjective expression *deteriorating global economy* (White, 2016). The implicit simile contained in the final sentence highlights a negative judgment about Russian aggression.

Consider the following example:

Vladimir Putin launched Russia's invasion of Ukraine in February, plainly believing it would be a swift campaign. It has not turned out that way. Ukraine's armed forces, government and people have resisted valiantly. The Western democracies have maintained unity in giving Kyiv military and material aid. There is immense symbolism, as well as logistical damage to Russia's campaign, in the huge explosion at the weekend that damaged the Kerch bridge linking Russia and Crimea. (The Times, 2022, October 10)

The given fragment vividly illustrates the fact that Russia is a country-aggressor. This is explained by the attributive syntagm "Russia's invasion", which has a negative connotation. At the same time, a positive image of Ukraine is created by using a simile that explains the symbolism of the failure of the Russian war in Ukraine.

In the course of dealing with the research data, we notice that metaphor occupies an essential place among stylistic means of influencing the reader in journalism. In the analyzed articles, metaphors are actively and creatively used as a means of verbal expressiveness, increasing the informative significance and imagery of a message using associations caused by the figurative usage of the word or word combination (Lakoff & Johnson, 1980):

The stunning rout of Russian forces by Ukraine's flash counteroffensive in the Kharkiv region does not, on its own, signal a decisive shift in the war to Ukraine's advantage. (The Washington Post, 2022, September 11)

In this utterance, the conceptual metaphor (RETREAT=BENEFIT) is based on the associative parallel between Russia and Ukraine, which is embodied in the images of stampede and victory (Morozova, 2017; Parakhonskyi & Yavorska, 2019; Prihodko & Prykhodchenko, 2018).

Linguists point to such a stylistic device of speech characteristic of the media as inversion, which is known as an emphatic construction. Inversion is targeted at attaching logical stress and additional emotional and expressive coloring to the surface meaning of the statement: "In weeks, Ukraine has cleared Russian forces from thousands of square miles in the Kharkiv region of the country's northeast." (The Wall Street Journal, 2022, October 13)

Inversion presupposes the response, which is more convincing than the normative sentence. The belief in the indisputable victory of Ukraine constitutes additional information brought into the utterance by the inverted word order. The metaphor "cleared Russian forces" strengthens trust in the appropriateness and correctness of the Ukrainian army's actions.

Let us consider another case representing the role of inversion in depicting the devastating nature of the war that Russia launched: "The longer the war in Ukraine carries on, the worse the consequences will be for the climate, the US presidential envoy John Kerry has warned." (The Guardian USA, 2022, May 11)

The phrase "the longer the war in Ukraine carries on", which is placed at the beginning of the utterance, attaches to the statement an emotional coloring, enhances the dynamism of the narrative and increases the negative attitude towards the country-terrorist.

Syntactic parallelism is considered a figure of repetition, consisting of the construction of a speech unit in which "the second part mirrors the first" (Pravdová, 2017).

France and Germany have both announced new military support for Ukraine in the past two weeks, especially for air defense, with Germany delivering its IRIS-T air-defense system to Kyiv. Britain, which is going through a political turbulence, remains easily the

biggest contributor of economic and military assistance for Ukraine among European states. (The Wall Street Journal, 2022, October 26)

Parallelism here expresses the backing and aid given to Ukraine by its partners. The existence of lexemes “support”, “defense”, “assistance” and the phrase “biggest contributor” confirms that the help will be up to the end of the war.

Contemporary linguistics highlights the dynamic connection between the meaning of a word and its context (Kachru, 2008; Kolegaeva, 2017). Context allows depicting its hidden potential. Lexemes encode former experiences and prior contexts of using a particular word or expression. In communication, the old clashes with the new one. The actual communicative meaning is generated due to a collision in the coded word or words’ previous contexts and the real situational context in which this statement is used (Kecskes, 2013). The individual contexts of the communicants, fixed in the same lexical units grounded on personal knowledge or in the same linguistic terms, often differ.

Our understanding of the context is based on its pragmatic consideration, because “the notion of pragmatic context is a theoretical and cognitive abstraction of a variety of physical, biological, and other situations” (Van Dijk, 1977, p. 19). The pragmatic context not only conveys information on the circumstances under which the expression is understood but also gives rise to visions concerning the potential goals of the participants. These relatively possible speech acts can be carried out in this situation. In other words, the pragmatic context, which serves to deliver the meaning of the statement in speech, is produced by a set of subordinate contexts: linguistic, stylistic, paralinguistic, situational, cultural, and psychological.

To illustrate the above-mentioned thoughts, let us consider the following example:

For Russia, things are only going to get worse,” said Lee, the military analyst. “For Russia, this is going to cause a morale problem. There are no good reasons for Russia to believe it can achieve any more in Ukraine than it already has. (The Washington Post, 2022, September 11)

This fragment shows how the context can change the meaning of the utterance. The bad state of affairs in the country-terrorist is described with the help of words with positive meaning (“morale”, “good”). The peculiarity is precisely in the fact that the lexeme “worse” dominates here, and due to this, the negative tone is formed. This information is strengthened by the last sentence, which has the indefinite pronoun “any” and explicitly confirms Russia’s defeat in its form.

Thus, the comprehensive consideration of the specifics of the functioning of different language units as a means of conveying the real attitude to the Ukrainian country and the resources of its image creation in the texts of the English media is appropriate, as it contributes to an understanding of the design features of the media picture of reality through the prism of different verbal items.

5. Conclusions

The results of this study show that the description of the war against Ukraine is of great importance nowadays. This topic is on the first pages of the English and American newspapers. The analysis of media discourse on the Russian-Ukrainian war discloses several language tools used in English newspaper texts within the period of aggravated social relations. In general, a political discourse abounds with the language means that explicitly represent aggression against Ukraine. The results obtained confirm the idea that the correlation between the utterance and the context helps to understand the encoded presuppositions of war in expressions of communication — that is, the speaker’s communicative intentions associated with their

epistemic state. It has been established that an utterance in which Russia's violence is depicted is created, realized, and can be interpreted only within the context. An important role in this process is played by various tropes and figures of speech.

It has been proved that stylistic means employed in the newspaper texts are determined by the communication conditions. If the speaker desires to rouse the audience and keep it in suspense, s/he will resort to different tropes and figures of speech. The most frequently used figures of speech are epithets, similes, metaphors, parallel constructions, inversion, and antithesis. Moreover, stylistic means are closely interwoven and mutually complementary, thus building up a complex pattern. Further investigations connected with the war and other political and social phenomena would have great potential. It may discuss the presentation of war in Ukrainian and English newspaper texts.

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Cultural Studies

The Discourse of Crises in the United States

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Abstract

We examine here the vigorous discourse in the United States about a number of inter-related crises. Many voices expressing a range of views discuss, debate, and strongly differ about the crises of antisemitism, the US Constitution, the US support for democracy or authoritarianism in other countries, the US role in fashioning a new world order, if the country is independent, and if new domestic and international systems will result. The concern for some is if these crises are temporary and may dissipate after an expected Democratic Party majority in the House of Representatives following the 2026 mid-term elections, if a more permanent transition is being established, or if the current crises are making more clear a system that has actually been in place for decades. Various judgements about possible answers to these questions depend on how current events are seen through the lenses of structuralism, liberalism, realism, or ethno-nationalism

Keywords: political crises, antisemitism, constitution, constitutional amendments, authoritarianism

1. Introduction

Americans are engaged in an ongoing discourse of inter-related crises and processes of disintegration and breakdown that are perhaps pointing to the emergence of new political systems. These include perceived crises of antisemitism and its uses for authoritarianism, constitutional crises of an overweening executive branch, freedom of speech and religion, the international law and rule-based system, classical liberalism, academic freedom, and American independence. We are asking ourselves if our nation, as we have hoped it could be, is in a process of breakdown and disintegration, with its transitioning to an authoritarian, populist regime within a balance of power international system.

2. A Crisis of Antisemitism

In June 2025, while shouting “Free Palestine,” an Egyptian man in Boulder, Colorado (USA), Mohamed Sabry Soliman, was charged with throwing Molotov cocktails at marchers who were calling for the release of Israeli hostages in Gaza. One of the Jewish victims, an 82-year-old woman, died of her injuries. (Brennan, 2025) The previous month, a young Israeli couple was murdered just outside an event at the Capital Jewish Museum in Washington, D.C. During the incident, the accused attacker, Elias Rodriguez, shouted “Free Palestine.” (Wendling, 2025) A month before that, an intruder set fire to the home of Jewish Governor Josh Shapiro of Pennsylvania (Commonwealth, Witz). In October 2024, Sidi Mohamed Abdallahi, a 22-year-old Mauritanian national, was accused of shooting an Orthodox Jewish Chicago resident while walking to synagogue. He later was said to have committed suicide while in jail following his arrest (Chicago Police Department, ToI). In 2023, there were considerably more hate crimes committed against Jews than other groups (NYT editors).

Jonathan Greenblatt, the Anti-Defamation League CEO, saw the problem in 2025 as much more widespread than some specific examples. He “repeatedly compared pro-Palestinian student protesters to Islamist terrorists in comments to Republican attorneys general and said the left harbored the “real deal threat” to Jews. “There is a throughline from Occupy Wall Street to BLM to ‘defund the police’ to ‘River to the Sea,’” he added, referring to the Black Lives Matter movement launched a decade ago to protest police violence. “They are the same people, these are the same kind of nihilists” (Rosenfeld & Kornbluh, 2025).

There are a number of efforts to fight back against the crisis of antisemitism. For example, on December 5, 2023, the United States House Committee on Education and the Workforce held a hearing on antisemitism on college campuses. The committee interviewed the presidents of Harvard University, the University of Pennsylvania, and the Massachusetts Institute of Technology. The presidents of Harvard, Penn, and Columbia eventually lost their jobs. The committee pursued their work, such as in July 2025 (Ma, Committee, 2025).

The Heritage Foundation became well known for its “Project 2025,” often thought to be a blueprint followed by the Trump administration (Chretien, 2025). In October 2024, just before the presidential election, the foundation issued “Project Esther: A National Strategy to Combat Antisemitism.” The report was published in 2024 and was intended to influence the Trump administration that would take power in 2025. It stated:

America’s virulently anti-Israel, anti-Zionist, and anti-American “pro-Palestinian movement” is part of a global Hamas Support Network (HSN) that is trying to compel the U.S. government to abandon its long-standing support for Israel. Supported by activists and funders dedicated to the destruction of capitalism and democracy, the HSN benefits from the support and training of America’s overseas enemies and seeks to achieve its goals by taking advantage of our open society, corrupting our education system, leveraging the American media, coopting the federal government, and relying on the American Jewish community’s complacency. The National Task Force to Combat Antisemitism intends to enlist all willing and able partners in a coordinated effort to combat the scourge of antisemitism in the United States. (Heritage, 2024)

A group called ‘Canary Mission’ states on their website that it “documents people and groups that promote hatred of the USA, Israel, and Jews. We investigate hatred across the North American political spectrum, including the far-right, far-left and anti-Israel activists. Every individual and organization has been carefully researched and sourced. You can help expose hatred by alerting us to anti-Semitic activity on your college campus and beyond” (Canary Mission). Users of the profiles are said to include Israeli intelligence organizations, Ministry of Strategic Affairs, and Shin Bet, which interrogate and deny entry to American citizens. In March 2025, multiple foreign students with Canary Mission profiles were detained by the United States Immigration and Customs Enforcement.

Betar US, the North American arm of Ze’ev Jabotinsky’s international movement, states on its website that the “Jewish community, especially young people on college campuses, are facing a rise in antisemitism that fuels isolation and vulnerability. Fragmented support systems and a growing disconnect from Jewish heritage weaken their sense of unity, pride, and resilience, threatening the strength of the Jewish community.” It says that there has been a 500% surge in Antisemitic incidents in the US, after October 7, 2023, 1,826 antisemitic incidents on US college campuses from October 2023 to June 2024, 8,873 antisemitic incidents across the US following October 7, 2023, and 747 bomb threats targeting Jewish institutions in 2023” (“Betar”).

Joining the fight against the crisis of antisemitism, President Trump appointed Chabad Rabbi Yehuda Kaploun as U.S. Antisemitism Envoy in April 2025. Trump wrote, “Yehuda is a successful businessman and staunch advocate for the Jewish Faith and the Rights of his people to live and worship free from persecution. With Anti-Semitism dangerously on the rise, Yehuda will be the strongest Representative for Americans and Jews across the Globe, and promote PEACE. Congratulations Yehuda!”

Kaploun said that “Our situation is similar to that of Jews in 1930s Germany, on the eve of Kristallnacht. They, too, lived in peace and quiet until the ground shook under their feet. And in the United States, the ground is already shaking. . . . What’s important to me is to do everything in my power to help Trump win, so that we – Jews everywhere – can feel safer” (Cramer, 2025).

In June 2025, a Trump administration investigation accused Harvard University of violating federal civil rights law by failing to protect Jewish students on campus. A federal task force said, “Harvard has been in some cases deliberately indifferent, and in others has been a willful participant in anti-Semitic harassment of Jewish students, faculty, and staff” (Nadworny, 2025). This was added to a list of other universities also accused of permitting antisemitism on their campuses, including Brown, Cornell, Northwestern, the University of Pennsylvania, Princeton, Columbia; George Washington University; Harvard; Johns Hopkins University; New York University; Northwestern; the University of California, Berkeley; the University of California, Los Angeles; the University of Minnesota; and the University of Southern California (Blinder, 2025).

It has been common to suspect that Trump is not actually concerned about antisemitism, but that he is using that concern to gain control over universities and those opposing him, and that he is himself, in fact, antisemitic. One example of his stereotypes came during a speech in favor of his “big, beautiful budget.” “Trump said “No death tax, no estate tax, no going to the banks and borrowing from, in some cases, a fine banker, and in some cases, shylocks and bad people” (Samuels, 2025). The derisive term “shylocks,” coming from Shakespeare’s play, *Merchant of Venice*, is often associated with antisemitic stereotypes about Jews and money. A number of Jewish groups criticized Trump for this statement, and 52% of American Jews believe that Trump is antisemitic, according to one poll (Gilson, 2025). The Jewish faculty at the University of Virginia argues that “The current political campaign against antisemitism in higher education does not protect Jews — it harms us, our communities and our institutions” (Jewish Faculty). This is part of a common concern that racist, antisemitic, white ethno-nationalist supremacy characterizes much of traditional American culture.

However, whether Trump himself is antisemitic or not, US policy is said to be a firmly supportive of Israel under the Zionist Joe Biden or an antisemitic or opportunistic Trump. As Leifer reports:

U.S. President Donald Trump's decision to join Israel in its 12-day war against Iran made it impossible to ignore what has been true all along. While the second Trump administration pitched a new approach to the Middle East, distinct from that of the Biden administration and even from Trump's own first term, the reports of a radical reorientation were always overstatements. The president's meeting with Prime Minister Benjamin Netanyahu on Monday will likely illustrate again just how consistent U.S. policy in the Middle East remains. (Leifer, 2025)

The debate about antisemitism includes the one about if Trump is weaponizing the issue in order to replace constitutionalism with his authoritarianism. For example, Avraham Spraragen argues that “Under the guise of combating antisemitism, President Trump is

spearheading an authoritarian crackdown” (Spraragen, 2025). Constitutional crises lay behind ones regarding antisemitism, in this view.

3. Constitutional Crises

3.1 Divided Government

“He who saves his Country does not violate any Law.”
Donald Trump (Haberman, 2025)

A liberal theory of American politics stresses its constitutional structure. The preamble to the US constitution states that “We the People of the United States, in Order to form a more perfect Union, establish Justice, insure domestic Tranquility, provide for the common defence, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do ordain and establish this Constitution for the United States of America.” The following articles that define the roles of the legislative, executive, and judicial branches of government outline how to secure the “blessings of liberty.” A free people depend on limits on each gear within the machinery of the state. And it is loyalty to the constitution that is required in the president’s oath of office, the oaths taken by newly commissioned military officers, new naturalized citizens, and others. Article II Section 1 of the constitution requires that an incoming president make an oath to “protect and defend the Constitution of the United States.” Another example is that of the oath taken by all newly commissioned US army officers is, “I ___, do solemnly swear (or affirm) that I will support and defend the Constitution of the United States against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; that I take this obligation freely, without any mental reservation or purpose of evasion; and that I will well and faithfully discharge the duties of the office on which I am about to enter. So help me God” (U.S. Army). In a liberal view, the constitution is the fundamental law that limits the state and the people, securing liberty for all. IT is common for liberals to see this basis of American politics in crisis.

There are a number of perceived constitutional crises according to many (Liptak, 2025). The first regards the central purpose of the founding document: a system of divided, limited government with legislative, executive, and judicial branches. The Constitution outlines the distinct powers of each and how they should interact in order to achieve the broadly stated purposes listed in the preamble (National Archives, n.d.).

Donald J. Trump began his second term as president in January 2025 with dominance of the Republican Party which has majorities in both houses of Congress. He has enjoyed rulings by the Supreme Court that are favorable to him. Many see a preponderance of power by the chief executive. Trump has gone so far as to define himself as a king, which is exactly the type of chief executive that the founders sought to avoid. Many have had fears of an imperial presidency during previous administrations, but they seem, particularly, intense this time. Opposition to Trump’s overarching authoritarian goals has sometimes coalesced around the theme of the “No Kings” marches across the country.

Figure 1
Long Live the King



Figure 2
No Kings Day Poster



3.1.1 Executive Orders

The US Constitution presents a legislative branch to pass laws, an executive one to enforce them, and a judicial one to interpret them. This intro to politics view is more complex in practice. Many presidents have found it much more convenient to issue their own executive

orders rather than go through Congress to get laws passed. During their terms in office, George H. W. Bush signed 166 such orders in his 4 years, Bill Clinton 364 in his 8, George W. Bush 291 in his 8, Barrack Obama 276 in his 8, Donald Trump 220 in his first term, Joe Biden 162 in his 4 years, and Trump 168 in the first six months of his second term (Wooley, n.d.). Trump likes to sign these with fanfare at his desk in the Oval Office, showing the dramatic signature to invited TV cameras. The advantage of this is that a president can do so much of what he wants to do without the messiness of liaison with Congress. The downside is that they can be quickly overturned by the next president. Still, by the time of the next president, many of the effects of the previous president's orders cannot be quickly changed. The long effects of previous orders rather than the orders themselves provide a lasting legacy. The downside to constitutional democracy is that a single chief executive can take on much of what appears to be the legislative function of passing law.

3.1.2 Dominance of Congress

Ever since 2016, Trump has enjoyed great influence in the Republican Party. With a solid majority of Republican voters behind him, he is able to threaten any Republican leader. He can support a loyal primary challenger to face representatives who do not vote his way. After the 2024 election, with Republican majorities in each house of Congress, this has given him legislative influence when he decides that his unilateral executive orders are insufficient (Bennett, 2025).

A number of Republican legislators at first objected to the 2025 “Big, Beautiful Bill” that Trump pushed. Fiscal conservatives at first opposed the bill since it would add trillions of dollars to the already bloated national debt of \$37 trillion. Even though the bill included significant cuts to Medicaid and other social programs, some wanted those cuts to be even deeper. Others wanted more stringent immigration controls. At a number of points during the negotiations, it looked to some like the bill might fail. But, Trump and Vance worked the phones, handing out carrots and sticks sufficient to get all but one Republicans to vote for his bill. As Mike Lillis and Michael Schnell observed, “Trump has never had more control over GOP” (Lillis, 2025). And dominance over the GOP (Republican Party) meant dominance of the legislative branch – at least until the 2026 midterm elections.

Another view of who dominates Congress comes from people like Representative Marjorie Taylor Greene (Republican, Georgia, 14th District), who says that Congress is obsessed with Israel due to AIPAC (American Israel Public Affairs Committee) and other groups (Carlson, 2025). The view that Congress is an Israeli occupied territory dates back many years. One example from 1990 of this was a statement by Pat Buchanan (Anti-Defamation League, Alphonsus, n.d.). In either case, Congress has long since given up the image of being a great deliberative body.

3.1.3 Supreme Court Support of Trump

In addition to executive orders and legislative dominance, many saw Trump able to bend a supine Supreme Court to his will due to his successful appointment of three justices during his first term, added to the previous number of conservatives on the court. The Supreme Court ruled on July 1, 2024 that a former president is entitled to absolute immunity from criminal prosecution for actions taken within the scope of his constitutional authority (Supreme Court, 2024). He could not be tried for his actions during the January 6, 2021 attack on Congress. As Michael Waldman wrote, in doing this, the court gave the president the power of a King (Waldman, 2024). It also paved the way towards Trump's re-election.

Once elected, the Supreme Court gave Trump other important victories. Among these are a June 2025 ruling that federal district judges do not have the power to issue orders that block

laws or policies throughout the United States (Supreme Court, 2025, Howe). Other cases favored Trump's desire to ignore constitutional birthright citizenship and his ability to deport immigrants. The most recent as of this writing is the decision to permit the Trump administration to send immigrants from Vietnam, Mexico, Laos, Cuba, and Myanmar to South Sudan (Schwartz, 2025).

Together, these issues have added up to the executive branch under Trump, tipping the scales decisively against two other supposedly equal branches of government.

3.1.4 Manipulations

Elections are a key part of constitutional democracy. In the Federalist Papers, Alexander Hamilton discussed the springs of government, or what makes the gears of government engage so as to produce what the preamble's goals entail (Hamilton, 1788). What makes office holders do what they do? They cite ambition, avarice, and love of fame. Madison says a realistic form of government is necessary since men are not angels (Madison, 1788). The founders did not ask for office holders to be perfectly virtuous. They sought a system that would encourage office holders to serve society because of their self-interests. Regular elections would motivate (aspiring) office holders to show or promise their good results and intentions to the voters who chose among alternative candidates. Voters could be counted on to discern what results and promises best served their interests and perhaps even values.

The authors of the constitution did not discuss what immediately developed after its ratification: the emergence of political parties. Voters were often not rational deliberators as much as they were loyal partisans. The authors also did not anticipate the level of corruption that big money could produce. Economic structuralists had long argued that the US constitution and American politics were based on the class dominance of the monied class or capitalists. For many, this became particularly glaring with *Citizens United v. Federal Election Commission* (Supreme Court, 2010). In this 2010 ruling, the Court held that corporations and unions can spend unlimited amounts of money to support or oppose political candidates, as long as that spending is independent of the candidates' campaigns. Big money donors could buy the best analyses on how to manipulate many voters. Focus groups, polls, and political consultants could make sure that elections had little to do with rational deliberation of policy options. Political scientists, such as Thomas Frank and many others, have analyzed why voters vote against their own interests (Frank, 2005). And political consultants were so effective that they could get a candidate as flawed as Donald Trump elected twice. Elections had become a weak part of the constitutional democratic dream.

Electoral manipulation was also said to have been managed by groups such as Charlie Kirk's Turning Point USA (see Turning Point). Kirk was reported to have been granted money from pro-Israeli donors; he could argue for any position that he wanted, many of which supported Trump, as long as he included his stated support for Israel. His support was said to have aided in Trump's 2024 election. He had, however, begun to express doubts about Israel. For this, he was called to a meeting by his pro-Israel supporters shortly before his September 10, 2025 assassination. At the meeting, where he was held to account, Kirk seems to have been put off by the pressure to stay in line (Blumenthal). Netanyahu denied the antisemitic allegation that Israel had been involved in the assassination. What seems to be more likely is that Kirk's funding may have been threatened by his growing skepticism of Israel. With that, his future influence in US elections would be curtailed.

3.2 First Amendment

3.2.1 *Freedom of Speech*

The first amendment to the Constitution states “Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; or abridging the freedom of speech, or of the press; or the right of the people peaceably to assemble, and to petition the Government for a redress of grievances. “Many have seen a crisis regarding “the freedom of speech, or of the press; or the right of the people peaceably to assemble” (Johnson, 2025).

No right is absolute and freedom needs to be defined. It is commonly said that no one is free to yell “Fire” in a crowded theater for the purpose of creating panic. No one is free to specifically advocate the use of force against a particular individual or group. However, everyone is free to criticize public policy and public officials. No one has the right to forbid speech just because it is false. I can say that a public policy is wrong even if others think it is demonstrably good and effective. I can say that a public official is scurrilous and stupid even if others think that leader is upright and brilliant. I can say that a group of people hold harmful views even if others think they are correct. What I cannot say is that it would be best if someone assassinated another person or members of any group. I cannot (or should not be able to) incite others to commit murder or say that I would like to do so.

There have been exceptions to this freedom in American history. National security during a time of war has led to fear trumping liberty. The Alien and Sedition Acts were a series of four laws passed by the Federalist party-controlled U.S. Congress in 1798 during the presidency of John Adams. These acts were designed to limit the rights of immigrants and restrict freedom of speech, particularly against the government. The Espionage Act of 1917 and the Sedition Act of 1918 criminalized dissent and criticism of Wilson’s post 1917 war effort. They led to numerous prosecutions and censorship of speech and publications during World War I and prohibited non-citizens living within the United States from criticizing the president or US policies. The Trump administration has used these precedents to arrest – or kidnap without due process – people (especially immigrants, visa, or green card holders) for public statements during rallies and demonstrations, social media postings, or op-ed pieces in newspapers.

3.2.2 *No Establishment and Free Exercise Clauses*

“Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof; . . .” (U.S. Const. amend. I). This is the first part of the first amendment. The founders were well familiar with the English conflicts between Protestants and Catholics and how they played into political battles. They wanted no political struggle in the new nation due to state-sponsored support for any one religion. They also did not want to regulate how people exercised their religion. The country has faced many disagreements about what these two clauses mean (Greenwalt, ACLU, 1999). Does government funding of religious schools constitute establishment? Do payments by the government (vouchers) sent to parents who use them to pay for religious schools? If religious people think that the exercise of their religion means petitioning the government for redress of grievances, what should be done? Many American Jews who were motivated by their faith’s teachings protested Jim Crow laws. Many American Christians who were motivated by their religious teaching protested US immigration laws and policies. Should religiously motivated people be denied the right to exercise what they thought was their rightful place in the public square?

The increasingly important role of US foreign policy in defending the existence of a Jewish state raises the question if this is a form of establishment. Would it be more in keeping with American values if we supported other nations adopting laws such as the first amendment’s

non-establishment clause? Many Jewish and Christian Zionists, in such groups as AIPAC and CUFI (Christians United for Israel), believe that their free exercise of religion includes lobbying and working for the benefit of a Jewish state. Should their right of free expression over-ride the non-establishment clause?

3.2.3 *The Press*

“Congress shall make no law . . . abridging the freedom of . . . the press; . . .”The *press* did not refer to the actual mechanical means by which newspapers were printed in the 18th century; it referred to the public dissemination of information and political, even partisan, views. With the new technologies of radio, TV, and the internet, *media* is a better term now than press. The crisis now is often not thought to be congressional action but executive orders and policies taken by the chief executive against the freedom of the media. This ranges from individuals who publish or otherwise disseminate views critical of the government or the president to companies that include the work of such individuals.

Trump threatened to sue the parent company of the news program 60 minutes for having edited an interview with Kamala Harris during the 2024 campaign. Paramount’s controlling shareholder, Shari Redstone, favored settling the case. She was seeking federal approval for a multibillion-dollar sale of her company to a Hollywood studio, Skydance. Paramount decided to pay \$16 million to Trump’s future library and be done with it. Dan Rather, a former CBS news anchor, lamented that this was “a sad day for journalism.”(Helmore, 2025, Betts, 2025). Trump was unhappy as well about how the bombing of Iran and ICE (U.S. Immigration of Customs Enforcement) kidnappings of immigrants and green card holders was being conducted. He threatened to sue the CNN news outlet over this (Helmore, 2025).

These specific cases went along with his often-repeated accusations of “fake news” from the “lame stream media” which are “enemies of the people.” He refused the Associated Press from covering certain events in the White House when it refused to call the Gulf of Mexico the ‘Gulf of America.’ He has pushed to defund the newscasts of PBS and NPR (Public Broadcasting System and National Public Radio) (Hamilton, 2025;Freking&Jalonick, 2025). Trump wants a subservient press, not an independent one.

3.2.4 *Law Firms*

Law firms are companies that are part of the process of how law is practiced in the United States. These private firms have often sought to act as good citizens, providing free legal representation, pro bono – to persons and causes that they deem worthy. Should this form of free expression be dismissed? Should President Trump be free to pressure law firms not to provide pro bono work as they see fit but to provide it to persons and causes that Trump supports? Is this a crisis in the freedom of assembly? Should not persons assembled in a corporation be free to determine what they think is in the public interest to support pro bono work?

In Trump’s memorandum, *Preventing Abuses of the Legal System and the Federal Court* of March 22, 2025, he wrote, “Lawyers and law firms that engage in actions that violate the laws of the United States or rules governing attorney conduct must be efficiently and effectively held accountable. Accountability is especially important when misconduct by lawyers and law firms threatens our national security, homeland security, public safety, or election integrity” (Trump).

This has led to the administration taking specific action against the firms: Covington & Burling; Elias Law Group; Jenner & Block; Paul, Weiss, Rifkind, Wharton & Garrison; Perkins Coie; Susman Godfrey, and Wilmer Cutler Pickering Hale and Dorr. It has also taken action against the attorneys: Alvin Bragg, Norman Eisen, Marc Elias, Letitia James, Peter Koski, Lisa

Monaco, Mark Pomerantz, James Quarles, Jack Smith, Andrew Weissmann, Mark Zaid, and Aaron Zebley (Balevic et al., 2025).

3.2.5 Universities

Liberal societies have long seen the value of academic freedom, ivory towers in which scholars are free from social and political constraints to consider and explore ideas beyond common discourse or even criticisms of the existing social order. In practice, this has often led to tensions between academics and the rest of society. During the Trump administration, many see a crisis having developed. The administration, congressional committees, and a number of billionaire donors have pressured universities to fight against the crisis of antisemitism – which appears to many rather as punishment of academic freedom.

In the spring of 2023, students set up pro-Palestinian tent encampments at a series of universities, starting with Columbia in New York City. They cited the crisis facing Gaza and the US complicity in it by sending billions of dollars in military aid to Israel. Many of the protestors were Jewish, but others alleged that the protestors chanted antisemitic slogans and blocked the free movement of pro-Israeli students. Other times, the crisis was about anti-Palestinian events. In a number of cases, university officials called in police to break up the peaceful protests (Reuters, 2024). At UCLA (University of California, Los Angeles), a pro-Israeli group attacked the pro-Palestinian encampment as police watched without intervening for hours (Georgiades, 2024).

Another form of the anti-Palestinian crisis was the use of doxing, or publicizing the names of the protestors so as to harass them or lead to diminished job prospects. For example, a truck with a digital billboard, displaying the words ‘Columbia’s Leading Antisemites,’ alongside the names and faces of affiliates who were allegedly part of organizations that signed a Palestinian solidarity statement, began driving around the campus. The group that sponsored the trucks, conservative media group Accuracy in Media, also published a website titled *Columbia Hates Jews* (Karam, 2023). Columbia University subsequently acquiesced to the Trump administration’s demands, and agreed to pay \$400 million in fines over its alleged failures to comply with federal civil rights laws related to antisemitism.

The House Committee on Education and the Workforce, Foxx in December of 2023 invited Harvard President, Claudine Gay, Penn President, Liz Magill, and MIT President, Sally Kornbluth to testify about antisemitism on their campuses (CBS). Other university officials testified at subsequent hearings. Magill and Gay lost their jobs shortly after the hearings. Minouche Shafik resigned in August 2024. This did not end the issue. The Trump administration accused a number of universities of harboring antisemitism. A particularly noteworthy example was in regards to Harvard, but there were others. The administration threatened to withdraw funding to these universities. Some suspected that the administration was using antisemitism as a pretext to harass universities with liberal / progressive professors who had been critical of Trump and DEI (diversity, equity, and inclusion) policies. The University of Pennsylvania was but one which removed DEI information from its website, as well as barred a transgender swimmer, Lia Thomas, from being on its women’s swim team. Trump was said to be opposed to free speech and academic freedom when it led to criticism of him or his version of American values.

Others suspected that Trump’s association with billionaires led him to support their efforts to influence universities. William Ackman, Ken Griffen, Seth Klarman, Lloyd Blankfein, Marc Rowan, Vahan H. Gureghian, Jay Clayton, and other major donors to various universities were critical of anti-Israel, antisemitic, and pro-DEI tendencies on campus (Copeland, 2023). Many

commented on how well represented billionaires are in the Trump administration and its policies (Charalambous, 2024; Mannweiler, 2025).

A possible effect of Trump's pressure on universities was the decision by the University of California at Berkeley in September of 2025 to send to the Trump administration files of 160 faculty and students thought to have been involved in alleged antisemitic incidents (Levin). One of the faculty members, a Jewish professor and critic of Israel, Judith Butler, said that she and others had not been given access to their files or information about the allegations. She accused Berkeley of having acted similarly to some universities in the McCarthy anti-communist era of the 1950s (see Schrecker).

4. Globalization of Authoritarianism

The crisis within the United States of President Trump, wanting to be independent of any external constraints from Congress, the judiciary, individual critics, the media, and universities, has been seen as a growing crisis of authoritarianism within the country (Levitsky & Way, 2025). Trump's admiration of authoritarians in other countries has threatened the traditional stated US support for a world of democratic nations to an overt support of authoritarianism in other countries. Trump and Vice-President J. D. Vance have been critical of democratic allies and supportive of other authoritarians such as Russia's Vladimir Putin, Viktor Orban, Kim Jong Un, and Ji Jinping.

At the Munich Security Conference in February, 2025, Vice-President Vance Munich Security Conference criticized what he called the "retreat" of free speech across Europe.

"The threat that I worry most about, vis-a-vis Europe, is not Russia, it's not China, it's not any other external actor," he said. "What I worry about is the threat from within: the retreat of Europe from some of its most fundamental values — values shared with the United States of America. "Across Europe, free speech, I fear, is in retreat," he added. "Under Donald Trump's leadership, we may disagree with your views, but we will defend your right to offer it in the public square — agree or disagree." (DW News, 2025)

He may have had a point regarding Europe but to single those allies out rather than including the criticism in authoritarian countries seemed to make a pointed criticism of democratic nations.

There is a debate about if Israeli Prime Minister Benjamin Netanyahu has been able to consolidate power in Israeli politics or if he is highly susceptible to the threats of members of his fractious coalition. Those who hold the former view point to his attempt before the assault on Gaza to reduce the power of the Israeli Supreme Court, as well as his firings or attempted firings of such officials as Defense Minister Yoav Gallant, Shin Bet Director Ronen Bar, Military Chief Lieutenant General Herzl Halevi, Military Spokesman Rear Admiral Daniel Hagari, and others. Perhaps more important is the view that the longest serving Israeli Prime Minister in the country's history has been able to prolong the war in Gaza in order to remain in power (Kingsley et al., 2025). Finance Minister Bezalel Smotrich and National Security Minister Itamar Ben Gvir, key coalition partners, have often threatened to take down the government, but they would likely lose their own power if they did. Trump sees Netanyahu as a successful authoritarian, and he objects to courts having been used to try and sentence him for felonies. With that in mind, he has told Israeli courts to drop the cases of corruption charges against Netanyahu (Durbin, 2025).

He has done the same for former authoritarian Brazilian President Jair Bolsonaro, who was accused of having helped incite an insurrection after he lost the 2022 election. On July 9, 2025,

Trump wrote to the current leftwing president, Luiz Inácio Lula da Silva, to demand that the charges against Bolsonaro be dropped and announce he would impose 50% tariffs on Brazilian imports until they were. “[This] is a Witch Hunt that should end IMMEDIATELY!” Trump wrote (Phillips, 2025). Neither of his efforts regarding these two court cases was successful, but they show that Trump not only wants his own authoritarian power free from judicial constraints but that other nations’ authoritarian leaders would also exercise lack of legal restraints.

5. A Crisis of Power over Law

From the founding of the United States through the end of the second world war, and throughout the Cold War, the nation routinely asserted its support for international law, a rule based world order, free trade, free markets, and human rights. Many have understandably doubted the sincere and total commitment to these ideals but beginning with the Biden administration and then especially in the Trump one, the fidelity to these ideals was placed in crisis. In their place was the assertion of a strictly power based international system, national interest in the service of authoritarianism, a spheres-of-influence world disorder, and even a mafia-style foreign policy (Hadavas, 2025).

Classical liberalism, since Woodrow Wilson and again since the US backed post WWII system, had sought legal solutions through international law and organization for international disputes. The United Nations, the International Court of Justice, and other international institutions promised that dialogue and law could settle disputes more peacefully than the balance of power system. The Biden administration at best gave lip service to these ideals, and the Trump administration shoved them into a crisis. The US regularly voted in the Security Council of the UN against the vast majority of nations in diplomatic protection of Israel. Both administrations gave many billions of military aid to Israel while feigning support for cease fires in Gaza. The US had long said it favored a two state solution and opposed Israeli settlements in the West Bank after the 1967 war but almost never meaningfully supported those statements. Trump abandoned any public support for them and just threw US support behind Israel’s drive towards a Greater Israel. With US support for Israeli actions in Syria and Iran, the borders of that Great Israel outlined in the Bible – not only including Gaza and the West Bank, but going from the Nile to the Euphrates – no longer looked out of sight.

International human rights law and the laws of war that the US and Israel had supported after WWII were routinely ignored as Israel bombed tens of thousands of civilians as they pursued enemy fighters, repeatedly displaced much of the West Bank and almost the entire population of Gaza, and carried out policies that led to mass starvation and dehydration.

There was reason to believe that the US plotted with Israel to feign negotiations with Iran so that Israel could benefit from surprise in its unprovoked attack of the country. Both the US and Israel claimed Iran was on the verge of developing nuclear weapons, as Netanyahu had often asserted since 1996. The IAEA and the US intelligence services said that this was not the case even in 2025, but both Trump and the Israeli leader remained steadfast to their unfounded claims. The goal of Israel and the US seemed to be regime change, the dismemberment of Iran, and access to the nation’s resources. This would be followed by negotiated peace and trade policies with the Gulf states and Saudi Arabia, and continued subservience of Egypt. Netanyahu’s 30-year goal of fragmenting many nations like Libya, Iraq, Syria, and Iran, and becoming dominant throughout the Middle East, would finally be achieved.

5.1 Undermining International Organization

An example of the US undermining the liberal, rules-based international order that it had been instrumental in establishing after the Second World War is the US government's denial of visas to the Palestinian delegation that had intended to attend the UN's General Assembly meeting in September of 2025. The United States denied and revoked visas for about 80 senior Palestinian officials, including President Mahmoud Abbas, who were planning to attend the meeting even though the 1947 United Nations Headquarters Agreement mandates the U.S. to allow entry for representatives of U.N. missions, though the U.S. retains some legal discretion to deny entry (Lee, 2025). Palestine has held Observer status in the UN since 2012 (United Nations and United States). For the US to deny visas to Palestinian officials to this meeting defies world public opinion, the public diplomacy that liberal organization has supported since Woodrow Wilson, and what the Declaration of Independence calls a decent respect to the opinions of mankind. Britain, France, Australia, and Canada had said that they would join the other 147 of the 193 UN members that already recognize Palestine. The Palestinian officials represent no threat to US security or other reasonable justifications to deny visas to them.

5.2 Crisis in NATO

NATO (the North Atlantic Treaty Organization) was established with its US anchor in 1949 in order to help contain the perception of Soviet expansion under Stalin. Trump dismissed and sidelined the organization, dismissing the Russian threat and placing NATO in crisis. He demanded significant increase in NATO nations' defense spending and threatened to conquer Greenland, which is under the authority of Denmark and Canada, both members of NATO. He has consistently claimed that the US bears the primary financial burden for NATO's collective defense and that Europe has enjoyed a free ride throughout the Cold War and beyond. He has pushed for each nation to increase its defense spending to 5% of its budget. He has implied an ambiguous meaning of the treaty's article 5, which states that an armed attack against one or more NATO allies shall be considered an attack against them all. Trump has emphasized that each ally will assist the attacked ally by taking actions as deemed necessary by itself.

6. A Crisis of Independence

Each year on July 4, the United States celebrates its 1776 Declaration of Independence. The document written by Thomas Jefferson refers to human events, the Laws of Nature and Nature's God, and a decent respect to the opinions of mankind. It asserts that all men – we would say all humans – are endowed with unalienable Rights of Life, Liberty, and the pursuit of Happiness. Independence from colonialism would allow the United States of America to assume a separate and equal station among the powers of the earth and realize universal rights.

To actually achieve that, independence would require a War of Independence and the generalship of George Washington, who became the nation's first president. After two four-year terms, Washington announced in 1796 that he would not seek a third term. In his farewell address, he said:

Nothing is more essential than that permanent, inveterate antipathies against particular Nations, and passionate attachments for others, should be excluded; and that, in place of them, just and amicable feelings towards all should be cultivated. The Nation, which indulges towards another an habitual hatred, or an habitual fondness, is in some degree a slave. It is a slave to its animosity or to its affection, either of which is sufficient to lead it astray from its duty and its interest.

A passionate attachment of one Nation for another produces a variety of evils. Sympathy for the favorite Nation, facilitating the illusion of an imaginary common interest, in cases where no real common interest exists, and infusing into one the enmities of the other, betrays the former into a participation in the quarrels and wars of the latter, without adequate inducement or justification. It leads also to concessions to the favorite Nation of privileges denied to others, which is apt doubly to injure the Nation making the concessions; by unnecessarily parting with what ought to have been retained; and by exciting jealousy, ill-will, and a disposition to retaliate, in the parties from whom equal privileges are withheld. And it gives to ambitious, corrupted, or deluded citizens, (who devote themselves to the favorite nation,) facility to betray or sacrifice the interests of their own country, without odium, sometimes even with popularity; gilding, with the appearances of a virtuous sense of obligation, a commendable deference for public opinion, or a laudable zeal for public good, the base or foolish compliances of ambition, corruption, or infatuation.

As avenues to foreign influence in innumerable ways, such attachments are particularly alarming to the truly enlightened and independent Patriot. How many opportunities do they afford to tamper with domestic factions, to practice the arts of seduction, to mislead public opinion, to influence or awe the Public Councils!

Against the insidious wiles of foreign influence (I conjure you to believe me, fellow-citizens,) the jealousy of a free people ought to be constantly awake; since history and experience prove, that foreign influence is one of the most baneful foes of Republican Government. But that jealousy, to be useful, must be impartial; else it becomes the instrument of the very influence to be avoided, instead of a defense against it. Excessive partiality for one foreign nation, and excessive dislike of another, cause those whom they actuate to see danger only on one side, and serve to veil and even second the arts of influence on the other. Real patriots, who may resist the intrigues of the favorite, are liable to become suspected and odious; while its tools and dupes usurp the applause and confidence of the people, to surrender their interests.

It is our true policy to steer clear of permanent alliances with any portion of the foreign world. (Washington, 1796)

A passionate attachment to a foreign nation is one threat to Washington's theme of national unity. The passionate attachment of some would become one reason for national disunity, since not all would share it. He warns against the political factions that would threaten republican government as well as national unity. There would be conflicts between those who share that attachment and those who see US interests and values as distinct from the foreign nation.

With the unconditional support of Israel by many in the US government, a crisis of independence has developed. It is possible to see Israel as the outpost of the United States in the Middle East. It is through supporting it that the US gains dominance and access to the resources of the region. It is, on the other hand, possible to marvel at the acquiescence of the world's most powerful country to the desires of a nation the size of the US state of New Jersey and a population of some 7 million people, making a small nation seemingly the in control of a superpower. Netanyahu can puff himself up thinking that he can manipulate American presidents at will. These two views misunderstand the issue as being about two distinct nations, as if each were like billiard balls.

Israel does not control the US; US policy towards Israel is most significantly influenced by a domestic Israel Lobby—American citizens who against Washington's advice have a passionate attachment with a foreign country. Their love of the US and of Israel leads them to think it is in

the American national interest to provide enormous amounts of aid to Israel and help it fight on its behalf, even at the cost of trillions of dollars. Without having annexed Israel, the Lobby's American citizens cannot see a distinction between the two nations' interests and values. They do not have dual loyalties – they see a single loyalty. Divided and limited government, freedom of speech, the establishment clause, freedom of the press, academic freedom, international law, other alliances, and Washington's advice all pale in the presence of the joint mission of the US and Israel. US independence from Israel is a violation of that common mission.

7. Discourses of Crises

The United States is experiencing a series of crises about which there is considerable discussion. It is not the first time in our history that we have had multiple crises and have made it through them, or at least limped through them, well enough to continue as a nation. Politicians regularly tell us that our best days are still ahead. Multiple dystopian TV series, movies, and books indicate a considerable market for those who are skeptical about that. A partial list would include *The Handmaid's Tale*, *Silo*, *The Last of Us*, *the Leftovers*, *Black Mirror*, *Severance*, *Paradise*, *Fallout*, *Blade Runner*, *Children of Men*, and the movie *Civil War*.

What will emerge after our current crises? Are we going through a permanent transition of regime type or will we be able to again try to become a more perfect union as mapped out in the text of the constitution and its amendments?

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The Permacrisis of Identity and Identification of British South Asians: a Critical Reading of *Blinded by the Light* (2019)

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Abstract

This chapter broaches the possibility of reading a cinematic text, *Blinded by the Light* (2019), as a cultural text, teeming with cultural, political, and ideological meanings. Hence, *Blinded by the Light* is interpreted as an encoding of the realities of race-related discourses in the 1980s British society. Arguably, British ethnic minorities- in this context, British South Asians- seemed to suffer from a socio-cultural permacrisis that can be detected in both the crisis of racial discourses and crisis in racial discourses. Applying a discursive and ideological analysis of *Blinded by the Light*, and being examined through the lens of Homi Bhabha's theory of hybridity and Stuart Hall's concept of New Ethnicities, the chapter argues that the condition of racial permacrisis is a structural condition in contemporary British multi-ethnic society that seems to transcend the various metamorphoses in post-war British race-related agendas. The chapter contributes to a better understanding of what can be called Diaspora cinema in Britain and how it negotiated issues of belonging and identity expression of the second and third generations of British South Asians.

Keywords: Britishness, British South Asians, discourse, ethnic identity, hybridity, permacrisis

1. Introduction

Blinded by the Light is a British ethnicity-related film produced in 2019 and directed by Gurinder Kaur Chadha, a Kenyan-born British film director of Indian origin. The movie is based on journalist Sarfraz Manzoor's memoir *Greetings from Bury Park*. Essentially, the movie depicts a British-Pakistani teenager's life in 1980s England and follows the integrating experiences of Javed Khan, a young aspiring writer in the city of Luton who finds inspiration and liberation through the music of the American Rock musician Bruce Springsteen. Fundamentally, the film explores interrelated and contingent themes of identity, cultural difference, racism, class struggle, and self-expression characterizing the context of Thatcherite Britain. This chapter attempts to answer the following questions:

- 1- What is permacrisis, and how does it relate to the race-related discourses in the British society?
- 2- How do cultural texts encode the different aspects of racial permacrisis in Britain?
- 3- To what extent does *Blinded by the Light* reveal the crises of/in British racial discourse?

2. Permacrisis and the Endless Spiral of Changing Continuity

The concept of permacrisis is a portmanteau of "permanent" and "crisis", a state of ongoing instability, crisis, and uncertainty. The idea offers a powerful theoretical framework for analyzing culturally and ideologically charged texts. The Guardian's columnist David

Shariatmadari defines the concept as: “a term that perfectly embodies the dizzying sense of lurching from one unprecedented event to another, as we wonder bleakly what new horrors might be around the corner” (Turnbull, 2022). Accordingly, a permacrisis entails not only the multiplicity of crises but also their interrelatedness and frequency. While Shariatmadari conceives the concept as progressive, this chapter, additionally, highlights the organic nature of the set of power relations generated by the concept with regard to the ethnicity-related concepts of identity and identification. Thus, identity formation of British South Asians is subject to various forms of contingency and interpellation. Arguably, identity formation is a complex process that is paradoxically dynamic in orientation and static in perspective.

The British movie *Blinded by the Light* (2019), particularly through the lens of ethnic identity construction, stands as an iconic text that teems with permacrises of all kinds. Hence, the film’s protagonist, Javed Khan, a British-Pakistani teenager in 1980s Luton, exemplifies the condition of socio-cultural permacrisis. Generally, this is detected in how his identity is shaped by a multiplicity of crises. A persistent, overlapping series of tensions contribute to this process of identity construction and negotiation. In this context, cultural, familial, racial, economic, and political conditions converge to shape the agency, positionality, and potentiality of Javed Khan’s identity in particular and those of his co-ethnics in general.

Blinded by the Light is analyzed as a cinematic text that dramatizes the concept of permacrisis in ethnic identity formation with a special focus on the Pakistani community, a major community within the British South Asian category. Though the concept of permacrisis means different things in different contexts, in the ethnic identity context, permacrisis emphasizes a protracted state of negotiation in which individuals from minority or diasporic communities feel never fully “at home”—caught between conflicting demands of belonging, loyalty, visibility, and survival. They are constantly managing contradictory forces with no final embarking on identity resolution.

In *Blinded by the Light*, accordingly, Javed’s life is in continuous social, cultural, and psychological unrest. As will be seen in subsequent sections, the perpetual liminality of the experiences of offspring of immigrants is reflected. In the subsequent section, I explain the theoretical underpinnings of this chapter, notably a comprehensive explanation and synthesis of two leading theoretical accounts: Homi Bhabha’s theory of hybridity and Stuart Hall’s concept of New Ethnicity. I believe that these two theories can frame the major arguments of this chapter as they start from the same postcolonial tradition and complete each other in expounding the various instances of cultural conflicts and negotiations with which the movie *Blinded by the Light* abounds.

3. Socio-Political Context: Britain in the 1980s

Set during the Thatcher era, the film grappled with the racial and economic tensions of the era. Hence, the scenes of the racist performances of the National Front, the proliferation of anti-immigrant graffiti, and the prevalence of hate crimes against South Asians are amply depicted by the movie. In one scene of the movie, racist members of the National Front expressed xenophobic sentiments, shouting in one march in Luton “Pakis out! Go home!” (Chadha, 2019). The idea is to highlight the rise of right-wing nationalism and its impact on South Asian communities. These events echo the broader socio-political context of the UK in the 1980s under Margaret Thatcher, where economic austerity and xenophobia unduly affected the lives of minority communities. Under the governments of Margaret Thatcher (1979-1990), the

question of race was fundamental to the politics of the New Right. Thatcher and her Conservative Party were remembered not only for the monetarist new liberalism and economic austerity, but also for the controversial race-related discourses and policies. The governments of the day both shaped and were shaped by the question of race. Arguably, the 1980s have been regarded as watershed in the history of race relations in contemporary Britain with novel and radical readings of the concepts of multiculturalism, national identity and otherness. Inevitably, economic revisionism and social unrest befell the structure of feelings of the era, and ethnic minorities were the major losers in the new balances of power relations. As far as immigration control policies are concerned, Thatcher's governments, building on earlier anti-immigration legislation, introduced the popular British Nationality Act of 1981, which redefined the meaning of British citizenship rendering it more exclusionary of immigrants and their offspring. The act imposed more restrictions on immigrants coming from the Commonwealth and made it harder to belong to the nation. Thus, the act, which has been seen as the cornerstone of Margaret Thatcher's race-oriented agenda, redefined the concept of national identity (Britishness) in narrower nation-based terms. Consequently, it became difficult for Commonwealth citizens to automatically claim the right to British citizenship. Importantly, the act redefined the broader idea of belonging to the British nation as it institutionalized legal belonging (citizenship with full rights of residence) and emotional/historical belonging (colonial subjects with no full rights of residence). This closed the door of free immigration and preferred those ethnic groups actually living in Britain rather than those living in other Commonwealth nations.

The British Nationality Act was, in many respects, a response to an implicit and sometimes explicit racist agenda adopted by the leaders of the Conservative Party. Even before coming to government, Thatcher expressed anti-immigration discourses couched in the language of national identity and cultural conformity. Thatcher often framed immigration as a potential threat to the social, political, and cultural fabric of the nation. In 1978, she was interviewed by *World in Action*, a Granada TV show, where she voiced out greatly controversial attitudes regarding the nature and impact of immigration on Britain. Echoing the notorious spirit and arguments of Enoch Powell's "Rivers of Blood" speech (1968), Thatcher said, "People are really rather afraid that this country might be rather swamped by people with a different culture. If there is any fear that it might be swamped, people are going to react and be rather hostile to those coming in" (Thatcher, 1978). The Thatcherite discourse is double-dimensional since it speaks to both the native Britons and the ethnic minorities. It mobilizes the xenophobic fears of the first and stirs the anti-integration behaviors of the second. Anti-immigration sentiments are, hence, legitimized and represented as more acceptable under the rule of the New Right. In the same context, Thatcher pledged to implement more immigration control measures and rejected open cultural diversity and multicultural settlements in favor of social cohesion and national unity. She affirmed: "We do not want people to be divided into separate communities. That is a recipe for disaster" (Thatcher, 1978). Ethnic others are framed as an existential danger to the purity and cohesion of British society. Accordingly, the experiences of integration of Javed and his family in *Blinded by the Light* are very likely to be influenced by the cultural, economic and social conditions generated by highly xenophobic Thatcherite politics. The economic failure of Malik Khan (Javed's father) was the direct outcome of monetarist policies and the deindustrialization of the era. Also, Javed's search for socio-cultural recognition by/in the British host community is considerably trampled by the xenophobic discourses and discriminatory behaviors of large sections of white Britons.

4. Ethnic Identity and Cultural Hybridity

The postcolonial perspective as articulated by the American Indian-born scholar Homi K. Bhabha best, in my view, frames the theoretical arguments of this chapter. In his masterpiece *The Location of Culture* (1994), Homi K. Bhabha explains one of the fundamental concepts in postcolonial studies; that is the concept of hybridity. Bhabha's theory of hybridity explores the complexities of identity, culture, and power in postcolonial contexts. Within the postcolonial theoretical diction, hybridity looms large in understanding the nature of the integrating experiences of postcolonial immigrants. Technically, the concept designates the *mixing or blending of cultures*, creating contact zones of colonialism, migration, and globalization. Hybridity, as Bhabha and other postcolonial scholars understand it, challenges the idea of *pure/authentic or fixed identities*, proving that all cultures are crafted through *interaction, negotiation, and adaptation*. According to Bhabha, "It is in the emergence of the interstices—the overlap and displacement of domains of difference—that the inter-subjective and collective experiences of "nation-ness", community interest, or cultural value are negotiated" (1994, p. 2). Thus, ethnic identities are constituted in these spaces, not in isolated, pure cultural identities. The negotiational power of the new blended and blending spaces demolishes any possibilities for binary oppositions and eradicates any claims of originality and authenticity. Yet, hybridity is not an absolute and pure blending of cultural traditions but it is a productive liminal space that originates new cultural apparatuses with novel tools and possibilities of identification for both the host community and immigrant ones.

Three fundamental concepts illuminate the arguments of hybridity theory. They are the concepts of "Third Space", "Mimicry" and "Ambivalence" all of which evince one aspect of the strategies and processes of integration within the host communities. To illustrate the arguments of this chapter, I exclusively and briefly, expound the concept of "Third Space of Enunciation" which refers to the in-between or interstitial spaces where hybrid identities are created and flourish. Such a space bestows inter-ethnic relations with new meanings that originate from neither the colonizer nor the colonized; it is a novel space with no absolute or well-traced roots. It is a space of negotiated, re-articulated and re-written meanings; a new semiotic space with new toolkits for the encoding and decoding of meanings. Bhabha confirms, "It is that Third Space, though unrepresentable in itself, which constitutes the discursive conditions of enunciation" (1994, p. 37). Hence, the third space is discursively constituted to meet the new expectations of its new inhabitants. Equally, he adds that "The hybrid moment of political change is not a transition from one identity to another. It is the third space, which enables other positions to emerge" (Rutherford, 1990, p. 211). These new positions and identities are new roads to take and alternatives to opt for. *Blinded by the Light* is thus a movie that evinces the hybrid nature of new ethnicities as embodied by the second and third generations of British Pakistanis while puts emphasis on the ever-lasting crisis or permacrisis of British South Asian communities.

Equally important, the concept of New Ethnicity as proposed by the British cultural theorist Stuart Hall captures outstanding aspects of the experiences of second and third generations of British South Asians. Hall's theory of New Ethnicity represented a serious criticism of both mainstream white anti-ethnic representations and the various forms of Black cultural nationalism that tended to endorse a singular, fixed notion of identity whether of the whites or non-whites. Hall believed that ethnic identities are system in flux with no essentialist traits. Commenting on the nature of black identity, he wrote, "If the black subject and black experience are not stabilized by Nature or by some other essential guarantee, then it must be the case that they are constructed historically, culturally, politically—and the concept which refers to this is

‘ethnicity’. The term ethnicity acknowledges the place of history, language and culture in the construction of subjectivity and identity, as well as the fact that all discourse is placed, positioned, situated, and all knowledge is contextual” (Hall, 1996, pp. 447–448). In brief, new ethnic identity is not natural, static, or biologically determined. Instead, it is cultural, historical, and importantly, constructed through discourse and representation. It is also diverse and hybrid. Applied to the movie, Javed’s identity is not fixed or essentialized as “Asian” or “British” but shaped through negotiation, representing as such a perfect model of new ethnicity. In a word, both theories of Bhabha’s hybridity and Hall’s New Ethnicity explain and confirm the fluctuations of identity expression and assertion of Javed Khan in *Blinded by the Light* and, of course, of millions of co-ethnics that share similar conditions of existence.

5. *Blinded by the Light: the Darkness of the Light!*

Applying a discursive and ideological analysis of *Blinded by the Light* implies the use of a specific methodological protocol that analyzes the various discourses of the movie and uncovers their ideological underpinnings. Technically, the discursive analysis focuses on how *language is a social practice* that helps shape reality not simply reflecting it (Fairclough, 1989, 1992). Consequently, language is engaged in representational activities where people, ideas, and events are depicted in specific ways that reflect specific relations of power. Hence, discourse constructs specific versions and visions of authority and marginalizes particular groups (Foucault, 1971, 1972). Javed and his Pakistani community are discursively marginalized while the mainstream British culture is given priority. Equally, language and discourse are highly context-governed in which words and meanings are not fixed and their semantic contents change depending on social, cultural, and political contexts of production and consumption.

The ideological analysis is fundamentally concerned with the *underlying belief systems* that construct the mainstream discourses of the movie. Ideological analysis is thus about the hidden and implicit assumptions about the world and how these assumptions and beliefs shape our conceptions of the conditions of existence. Seen from the lens of ideological analysis, the ideas about these conditions and structures of existence are naturalized and represented as hegemonic commonsense. So, as Antonio Gramsci argued in *Selections from the Prison Notebooks* (1971), hegemonic commonsense maintains the domination and control of specific social and cultural groups through ideas and consent not just force and coercion. Different institutions like schools, religion, and media perform ideological functions and disseminate a false consciousness that prevents subordinate socio-cultural groups from fulfilling their potential (Althusser, 1970; Hall, 1980, 1990). Typically, ideological analysis detects the procedures and aspects of the false consciousness and uncovers how it creates binary, simplistic oppositions that categorize and reduce the complexities and diversities of socio-cultural groups into essentialist terms such as Us/Them, Good/Bad, etc. These, often hard-to-bridge, ideological divides are the target of ideological analysis of any cultural and political text. In this context, *Blinded by the Light* exposes such binary divisions and their negative impact on both the mainstream British culture and the ethnic ones. The binary divisions generate binary visions of the world and promote a state of permacrisis of identity and identifications for not only the British South Asian communities but also for the British mainstream white ethnicity.

Through the analysis of the movie, the condition of permacrisis looms large in every scene and narrative. The contingent processes of identity affirmation and re-invention reflect major aspects of the prolonged discourses of crisis and crisis of discourses that *Blinded by the Light* champions. The diasporic identity of the hero of the movie Javed Khan (Viveik Kalra), encapsulates all the inhibitions and marginalization that his South Asian Pakistani community

seems to face in the British host society. Crucially, the discourses of crisis and crisis of discourses, though they seem to be a pun, do refer to two distinctive aspects of the South Asian experiences in Britain. Here, it is necessary, I think, to highlight the difference between the two expressions, reflecting two different directions of analysis. The discourse of crisis designates the external narratives, representations and framings of British South Asians as problematic; this discourse is largely proliferated by the mainstream British media and reconfigured, perhaps in more extremist and overt versions by British racist groups such as the National Front and the British National Party. As for the crisis of discourse, I focus mainly on the internal inter-ethnic/intra-ethnic negotiations of identity construction and belonging. Notably, the same expression can perfectly cover the fragments and diversities of the British hegemonic discourses in relation to British South Asians and their integration into the mainstream cultural apparatuses. However, my analysis sticks to the internal discursive version of the expression, which is how ethnic discourses of cultural essentialism and imagined cultural cohesion of the ethnic Diaspora fail to meet the expectations of second and third generations of British South Asians, such as Javed Khan. While discourse of crisis constructs British South Asians as an incessant threat, the crisis of discourse, under the pressure of the discourse of crisis, attempts to offer new spaces of self-invention and identity re-imagining; spaces that transcend the pressures imposed by external mainstream narratives and internal diasporic ones. In this context, a new ethnicity appears that enunciates itself in a hybrid third space: neither the dominant nor the marginalized.

As Hall (1996) explained, the new ethnic identity is perpetually changing and flexible enough to escape the cultural canons of host and home cultures. The essentialist conceptions of binary oppositions of identities are no longer valid in the context of Hall's new ethnicity and Bhabha's hybrid third space. Defending his own new ethnicity, Javed affirms in one major scene in the movie: "I'm not English, I'm not Pakistani...I'm just me" (Chadha, 2019). This quote speaks the major message of the movie. Javed, like many members of his age, refuses the essentialism and fixedness of both the host culture and native culture, favoring a new cultural paradigm that prioritizes negotiation and dialogue rather than opposition and conflict. Arguably, such a new ethnicity was an obligation to Javed when contextualized in the flow of the movie's narratives. Being squeezed and misunderstood by both the British mainstream culture and his co-ethnics, Javed Khan challenged both of them and sought new ways of becoming, to use Hall's expression. He eloquently articulates that permacrisis of identification in 1980s Britain when he sarcastically protested: "They don't think we belong here, but we don't belong there either" (Chadha, 2019). This is crucial since immigrants who do not feel at home in their new country also would expect to be out of place in their old one. Ironically, the subject pronouns "They" and "We", as long as the deictic words "Here" and "There" are very ambiguous if decontextualized from the narratives of the movie and read in the wider context of British race relations. Deictic words in Javed's quote create a multitude of subject positions that indicate the contingency and multidimensionality of the experiences of South Asian communities in Britain. Defining the concept of deixis, Fillmore writes, "Deixis is the name given to those aspects of language whose interpretation is relative to the act of speaking, the time of speaking and the times before and after the time of speaking, the place of the speaker at the time of speaking, and the identity of the intended audience with the speaker. A broad theory of deixis takes into account other aspects of the speaker's spatial, temporal, and social orientation" (1971, p. 205). Hence, the idea of belonging, as expressed by Javed, is positional and contingent. The subject pronouns "They" and "We" may mean the host society (British whites) and the ethnic community (South Asians) interchangeably. Communicating with his father Malik (Kulvinder Ghir), in a turbulent scene of the movie, Javed recognizes his hybrid nature and orientation. His father, just like many first generation immigrants, emphasizes the

indigenous nature of the community and prioritizes the Pakistani belonging of his son while denying any potential relations with the host community. In this context, Javed's utterance may be read as follows: "They (first generation of co-ethnics) don't think we (offspring) belong here (Britain), but we (offspring) don't belong there (Pakistan) either". The other more possible reading is that the "They" and the "Here" refer to the white Britons and Britain, while the "We" and the "There" designate the Pakistani community and Pakistan. Interestingly, even in the narrative course of the movie, both positionalities are valid, which reflects the permacrisis of belonging that Javed and his peers faced under the regime of the 1980s race-related policies of the then Conservative governments.

Blinded by the Light follows the experiences of adaptation and re-invention of the identity of Javed, a British-Pakistani teenager whose life is transformed upon discovering the music and lyrics of Bruce Springsteen. The film navigates the possibility of self-expression and identity assertion through music. Hence, the music of Bruce Springsteen represents a new third space of enunciation and act of resistance against the insistence of both the host and ethnic communities. The trajectories of how music can be an effective tool of resistance have been comprehensively treated by many scholars (Baily 2006; Baily, & Collyer, 2006; Gilroy, 1993; Jung, 2014 & Lidskog, 2017). Explaining the latent power and potential of music, Rolf Lidskog affirms that "Music can be used as a symbolic identifier of a social group, both by the group's members but also by the surroundings (its non-members). Music not only functions to express and maintain pre-existing identities, it also provides resources for contesting and negotiating identities and constructing new ones" (Lidskog, 2017, p. 25). For Simon Frith: "Music [. . .] gives us a way of being in the world, a way of making sense of it" (1996, p. 114). So, music offers a potential for expressing identity in novel and universalist ways and makes sense of personal and collective experiences. Javed, while listening to the music of Springsteen was attempting to understand the conditions of his being both in his South Asian community and British host society. In the same line of thought, the British sociologist Paul Gilroy, in his masterpiece *The Black Atlantic* (1993), writes about the significance of music and identity formation in the context of slavery and the black Diaspora in the US. He affirms that "music and its rituals can be used to create a model whereby identity can be understood neither as a fixed essence nor as a vague and utterly contingent construction to be reinvented by the will and whim of aesthetes, symbolists, and language gamers" (Gilroy, 1993, p. 102). Though Gilroy focused in his study on the American experience, the same arguments are highly valid in the British context, and the movie proves that South Asian second and third generations are facing a double consciousness that necessitates a new ethnic hybrid understanding. Yet, though music may create perfect hybrid spaces, it still expresses specific cultural orientations and traditions. Javed mixed Urdu and English words in his poetry to confirm his Britishness from his ethnic Pakistani perspective. Perfectly, Josh Kun articulates this idiosyncratic aspect of any musical and poetic artifact. He wrote: "While it may take root in national formations, impact national audiences, and impact the creation of national ideas and politics, music is always from somewhere else and is always en route to somewhere else" (Kun, 2005, p. 20).

In the movie, music functions as a transformative force with huge liberating and emancipating potential. As such, Springsteen's lyrics are more than a soundtrack, used simply to gratify some emotional and entertaining needs. Springsteen turns out to be a gospel of liberty and empowerment for Javed and his peers of all ethnic communities, including the white majority. His lyrics become a philosophical conduct for Javed. Chadha, the director of the movie, uses calculated visual techniques, such as lyrics superimposed on the screen and characters which break into spontaneous movements, the aim of which is to call attention to the internal and steady awakening of Javed's experiences. Used as a narrative device, music

bestows the movie with thematic coherence. The message is that music can create cultural bridges between cultures, whatever their differences are. The movie director integrates Springsteen's songs into key moments (e.g., "Born to Run" during Javed's epiphany), employing a Bollywood-esque musicality; a new music that blends Western and South Asian cinematic traditions. Hence, the soundtrack functions as a narrative bridge, exposing Javed's inner turmoil and aspirations.

From a technical and cinematic perspective, Chadha mixes social realism with specific musical elements. The aim is to create a film that belongs to the social protest tradition, yet with emotional and expressive tones, highlighting not only the racial aspects of British South Asians but equally other intersectional aspects such as the issues of class, gender, sexuality, and the generation gap. The selection of Luton as the social and geographical setting of the movie, with its seamy and gloomy atmosphere emphasizes the constraining destructive environment from which Javed seeks to escape. Hence, the grey skies, modest homes, and industrial landscapes of Luton reflect the traumatic psychological state of the second and third generations of British South Asians who came to Britain as immigrants and then became minorities suffering considerably from the "tyranny of the majority" in all walks of life. Hence, the scene when Javed first hears Springsteen's "Dancing in the Dark" is dramatically constructed as a cinematic epiphany, showing how music can generate moments of transcendence and emancipation. So, crucially, montages, voiceovers, and music-video-like sequences are tailored to convey Javed's inner emotional struggles and psychological fluctuations. Interestingly, the cinematic stuff of the movie projects specific representations of Javed and his fellowmen. However, it is evident that the movie gives Javed space to represent himself and his community via his poetic input, creating new hybrid outlets and managing new ethnic identities. As Hall eloquently suggested, "It is only through the way we represent and imagine ourselves that we come to know how we are constituted and who we are" (Hall, 1996, p. 442). Self-representation is a source of empowerment that *Blinded by the Light* offers to its actors as well as its audiences. Such self-representation is a crucial step in ethnic identification for South Asian immigrants and their offspring. The poetry of Javed is self-representation and self-expression. Javed looks for a legitimate place in the contemporary British mainstream community by creating his own poetry that enables a "subaltern" like him to speak. Music turns out to be a strategy of self-empowerment and resistance.

Blinded by the Light is a movie that can be classified under the genre of what can be called Diaspora cinema. In the diasporic context, there seems to be an everlasting tendency to all that is hybrid that goes beyond the norms and mores of both Britishness and Pakistanness. This creates a third space of enunciation and expression that goes beyond, or at least curbs, the negative effects of the permacrisis of identity and identification of British South Asians. The poetic and musical third space for Javed was a moment of redemption and salvation from the shackles of assimilation and tradition. Alejo Carpentier (1976) talked convincingly about such an escape from the double pressure imposed on Javed and his peers from within (the ethnic community) and from without (mainstream culture). He wrote: "A yearning for escape is, in fact, a search to find oneself; which is when all is said and done, a return to oneself" (Carpentier, 1976, p. 111). Dramatically, Javed expressed such an uncontrollable desire for escape and emancipation. Several scenes in the movie epitomized that desire. In a crucial scene in the movie, Javed adapts and adopts Springsteen's lyrics "You're not gonna stay in this town [referring to Luton], and you're not gonna die in this city" (Chadha, 2019). Javed and his peers attempt to escape the economic marginalization and racial discrimination symbolized by the city of Luton. Unlike his father and the first generation of immigrants, Javed is hopeful about the potential of self-assertion and self-realization in a generally hostile host community. He

refuses the passiveness of his father and looks for a more participatory role in the mainstream culture. The climax of the rejection of discrimination, passivity, and invisibility was when Javed defied his father, asserting: “You want me to be like you-quiet, invisible, defeated, Well, I’m not” (Chadha, 2019). This quote is strong and expressive, the target of which is not only the father or even the first generation of immigrants, but even the mainstream British society. Javed’s message and that of the whole movie is that the state of permacrisis is tactical rather than strategic, and that new generations of South Asians claim their British citizenship with all the rights it offers.

6. Conclusion

Blinded by the Light is a crucial postcolonial cinematic text that reconfigures British cinema to include South Asian voices, voices of the subaltern. Through its engagement with hybridity, resistance, and cinematic innovation, the film challenges hegemonic narratives while offering alternative versions of and visions on race, class, and belonging from an ethnic perspective. Chadha merges Springsteen’s lyrics with British South Asian experiences which created a universal story of defiance and self-discovery with personal traits. The movie presents a hybrid experience of Javed’s struggle between two worlds to end up with inventing a new ethnic identity that takes the best of both. The new ethnic hybrid identity is not about ‘*choosing between two cultures*’, but about ‘*creating new cultural meanings*’ in the in-between spaces. This new identity, to use Hall’s jargon, is fluid, multiple, and constructed since it is a recipe for diversity within diversity, enabling marginalized groups to define themselves on their own terms and retain considerable agency in the British multi-ethnic society.

Blinded by the Light is a consideration of an ethnic permacrisis of identity assertion and expression for the British South Asians. Gurinder Chadha’s film is both a personal story and a critical appraisal of identity politics in a multicultural British society. The depicted permacrisis is the structural socio-cultural milieu against which Javed’s personal, social and cultural transformations unfold. Despite the movie’s optimistic message, as Javed discovered his voice through Springsteen’s music and could finally speak out about his subalternity, this does not expunge the structural problems in front of him and his community. Hence, in my view, *Blinded by the Light* merely shows that resilience and self-expression can emerge despite the persistence of the conditions of permacrisis.

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Reading into the ‘Impossible’ Migration Theorization: Epistemic and Discursive Peculiarities of the ‘South’

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Abstract

Research on international migration has always fixated on a unique question: what drives migration? In answering this ‘simplistic’ question, researchers and politicians resort to theories and discourse(s) implemented by Western theorists, for Western audiences, about migration into Western countries. In the context of the Maghreb, the recent trends of sub-Saharan migration have received incomparable attention from researchers in the Global South and North, yet their production seems uncritically emanating from Western(ized) theoretical and methodological approaches. Gravity models, networks and systems, and racialization theories, inter alia, are the major approaches used to address such a phenomenon. However, South-South migration is intricate, and the game-changer in migration research and discourse should be contextualized. The exorcism of migration theory and discourse from projectionist and myopic conceptual paradigms can only be achieved by what Hein de Haas dubbed “conceptual eclecticism” (2014), coupled with another equally important revision–decolonializing migration. Contemporary migration revisionists, like de Haas, Massey, and Castles contend that old theoretical propositions are “fragmented”, untestable, and non-problem oriented. This chapter argues they are “colonial” at their roots and in their premises. Methodologically, this research employs qualitative discourse analysis (Wodak & van Leeuwen) to examine how migration theories and discourses are constructed, focusing on linguistic markers, deictic references, and epistemic designations that reinforce Eurocentrism. It critiques colonial optics embedded within migration propositions. Drawing insights from Critical Discourse Analysis (CDA) and decolonial studies, and revisiting foundational assumptions, this work challenges entrenched colonial legacies and advocates for a new Decolonial Zeitgeist, i.e., Cultural Migration Studies.

Keywords: decoloniality, qualitative analysis, cross-disciplinarity, South-South migration, discourse(s), Cultural Migration Studies

1. Introduction

This research emerges as a ‘late’ by-product of my doctoral research, which I began in 2021 at a time when the question of media representations of sub-Saharan migrants in Tunisia was still largely unexplored. I vividly recall a training session within the ERASMUS+ MIGRANTS project, where a professor remarked that “there is no such corpus to analyze, and no research question to tackle.” This statement, while reflective of the research landscape at the time, exposed a deeper issue: the epistemic blind spots and silences that have long characterized the field of migration studies, particularly in the Global South.

As I embarked on my PhD journey, I was new to migration studies and sought to anchor my analysis within established theoretical frameworks. However, my initial literature search yielded restricted results, oscillating between antiquated, often decontextualized theories (Lee, 1966; Ravenstein, 1889) and highly specialized, unidimensional frameworks such as push-pull

theories, neoclassical economics, or world-systems theory (Wallerstein, 1974). These approaches, while historically foundational, appeared insufficient for capturing the complexity and diversity of contemporary migration flows, particularly those occurring along South-South axes.

The most pressing issue I encountered was the colonial underpinnings of these migration theories. Except for recent ‘eclectic’ or critical approaches, many frameworks remain deeply rooted in colonial logics, Eurocentric assumptions, and binaries that continue to shape knowledge production. For instance, while reviewing mainstream theories, I observed that they failed to account for emerging trends in South-South migration, such as the increasing movement of sub-Saharan Africans to the Maghreb, South Asians to the Gulf states, Venezuelans to neighboring Latin American countries like Colombia and Brazil, and Burmese migrants to Thailand— patterns that challenge the traditional North-South migration paradigm and call for nuanced, regionally grounded analytical frameworks.

My frustration reached its peak when I experienced a personal moment of reflexivity at my PhD viva, in Palermo/ Italy, when one of the examiners pointedly asked why my bibliography was largely composed of Global North scholars. At that moment, I felt puzzled, aware that while I had engaged deeply with Western foundational texts, something fundamental was missing. The question lingered beyond the defense, leaving me with unanswered questions and new prospects regarding whose knowledge I was centering and why, and how even the process of citation can perpetuate epistemic hierarchies in migration studies.

This encounter underscored the urgency to interrogate whether the Global South is merely positioned as a site of empirical data extraction or whether it can become a source of theoretical production in its own right. It calls for what Mignolo terms “epistemic disobedience,” a refusal to uncritically apply Northern-generated theories to Southern contexts without acknowledging their limitations, silences, and exclusions. It also compelled me to reflect on whether, by relying on these frameworks, I was simply reproducing the very epistemic hierarchies I sought to critique. It further underscored the need to envision alternative theoretical and methodological approaches that are attuned to the specificities of South-South migration and culture, while questioning the very structures of knowledge production within migration studies.

This chapter constitutes the final stage of an intellectual and analytical journey that began in 2021, as part of my research on (Cross-)Cultural Migration Studies³⁵ (from representations of sub-Saharanans in Tunisian media (2023), to their self-representations on social media (2024, 2023), to the question of cultural accommodation of South-East Asian Muslim migrants in Sicily (2023), etc.). Over the past four years, my work has followed a coherent and deliberate narrative arc: from interrogating the media representations of sub-Saharan migrants in Tunisia, to examining the implications of such portrayals on public opinion, and subsequently, to exploring how migrants themselves rearticulate identity and agency through self-representation on digital platforms. This concluding phase turns the gaze inward, toward the academic field itself, to question how knowledge about South-South migration is produced, framed, and often distorted. The central motive behind this research lies in confronting the epistemic failures and structural inadequacies of migration theory, especially its persistent entanglement with Eurocentric paradigms. Drawing on decolonial critique, it could be argued that the continued

³⁵ Cultural Migration Studies is a recognized interdisciplinary field, which is scientifically grounded and and is actively developed by scholars across migration studies, cultural studies, media studies, postcolonial theory, and critical theory. Key scholars in this relatively recent field are *inter alia* Nina Glick Schiller, Iain Chambers, Lionel C. Bascom, Avtar Brah.

marginalization of South-South mobility in scholarly discourse is not merely an oversight but a manifestation of what de Sousa Santos terms the ‘epistemologies of the South’ (2016)– a condition in which production of knowledge(s) actively delimit what can be known, by whom, and for whom.

Additionally, the language of migration theory often remains reductionist and myopic, privileging categories such as “immigrant” and “emigrant” or “regular” and “irregular,” which inadequately capture the lived experiences of migrants and the fluidity of mobility in the Global South. This discursive limitation reflects what Mignolo terms “body/ geo politics of knowledge” (2009) where knowledge production remains geographically and epistemically anchored in the Global North. This is particularly striking, given that most contemporary migration flows involve the Global South, yet the theories framing these movements are predominantly developed and circulated by scholars based in the Global North, notably the US and the UK. Figures, such as Douglas Massey, Immanuel Wallerstein, Michael Todaro, Everett Lee, and Russell King, remain highly influential, shaping the theoretical terrain against which South-South migration is analyzed.

This imbalance begs a critical question: how can migration studies meaningfully account for the realities of South-South migration when its epistemological foundations remain rooted in Northern experiences, priorities, frameworks, and languages? Scaglioni (2017), an Italian researcher, attempts to anchor the sub-Saharan ordeals within a ‘racism’ phenomenon, framing Blackness as “an ascription from the outside” (p.17), but totally ignores the French colonial roots of such racialization of the Tunisian society. Another shortcoming is linguistic/ cultural/ epistemic distance between researcher and interlocutors raising questions about representational accuracy. Scaglioni conducts interviews in a complex multilingual setting (Medenine, Tunisia), involving French, Arabic, Tunisian Arabic, and African languages, resulting in misunderstanding of local subjectivities. For instance, when she states that “working at the hammam...and jobs connected to iron and fire... are the prerogatives of Blacks” (2017, p. 12), she invokes an outdated and problematic framework. The reliance on a colonial-era source (Brunschvig, 1962) to characterize Black labor in contemporary Tunisia is not only anachronistic but also misaligned with the post-2011 socio-political landscape. Moreover, Scaglioni’s catchy article *I Wish I Did Not Understand Arabic* is problematic in failing to engage reflexively with translation or linguistic mediation. Despite working in a multilingual context—where Arabic (both standard and dialectal), French, and various sub-Saharan African languages coexist—she does not mention how meaning was negotiated, interpreted, or possibly lost in the process of data collection and analysis. This silence is not merely technical; it has profound epistemological and colonial implications.

Scaglioni’s (2017) omission of any discussion on translation, interpretation, or linguistic positioning reproduces the myth of the “transparent observer”— a figure long critiqued in postcolonial and decolonial scholarship for effacing the geopolitics of knowledge (Grosfoguel, 2011). The failure to situate her own linguistic limitations or communicative intermediaries (e.g., interpreters, fixers) risks a distorted rendering of informants’ narratives, especially given the deeply contextual, coded, and affective dimensions of speech among racialized communities in Tunisia³⁶.

³⁶ Compare to the works of decolonial scholars like Federica Mazzara (2025) who acknowledges the mentoring and help of a Tunisian researcher in the translation and interpretation of social media content produced by *Tunisian harraga*.

Language is never a neutral medium. As decolonial theorists have long argued (Mignolo, 2009), colonial power often operates through linguistic hierarchies, where certain languages (e.g., French or English) are treated as legitimate carriers of knowledge, while others—local dialects or oral traditions—are marginalized or misrepresented. In the context of migration research in the Maghreb for instance, this means that interviews conducted in dialectal Arabic or in African languages risk being filtered through a Eurocentric interpretive grid, particularly if the researcher lacks fluency or does not acknowledge the politics of language in the field.

The question of Western migration ‘theorization’ became even more urgent when dealing with policy theories—whether agenda-setting models, policy diffusion frameworks, or implementation theories—were themselves deeply anchored in Global North contexts and epistemologies. Moreover, I was confronted with the absence of full-fledged migration policies or comparable policy models within the Maghreb region. Rather than finding coherent policy frameworks that could be systematically analyzed and compared across contexts, I encountered fragmented legislations and ad hoc measures that resist fitting into the established policy models predominantly developed in and for the North. This highlighted not only a gap in the theorization of migration governance in the Global South but also the limitations of applying Northern policy models uncritically to Southern realities.

This chapter, therefore, seeks to unpack how colonial discourses continue to shape migration theory and its language, examining their inadequacy in explaining South-South migration patterns and advocating for epistemic reorientation within the field. By suggesting the Global South as a site of theory generation rather than mere empirical description, this study aims to contribute to the decolonial turn within migration studies, calling for plural, situated, and reflexive frameworks capable of capturing the nuances of contemporary mobility. For the purpose of showcasing and deconstructing the colonial roots of migration theory and discourse, I carry out a semi-systematic literature review of the published and/ or acknowledged migration theories/ studies using theories to identify how these theories embed colonial postulates and to what extent they sustain colonial hierarchies.

2. Theoretical Background: Decoloniality a Theory/ Non-Theory

In engaging critically with migration theories and their epistemic underpinnings, this study adopts what may be described as an eclectic decolonial perspective. Decoloniality, as both a critique and a praxis, emerged as a response to the enduring coloniality of knowledge, power, and working from within modern epistemological frameworks. The term and the intellectual movement behind it were coined and elaborated by scholars such as Aníbal Quijano, Walter D. Mignolo, Sabelo J. Ndlovu-Gatsheni, and Ramón Grosfoguel among others, who sought to expose and challenge the invisible colonial matrix that continues to shape geo-knowledge production and global power hierarchies long after the formal end of colonial administrations.

Quijano (2000) introduced the notion of *coloniality of power* to describe the persistent patterns of domination rooted in colonialism that continue to structure epistemic relations globally. Mignolo (2009, 2018) expanded this by calling for “epistemic disobedience,” advocating for a delinking from Eurocentric epistemologies and embracing pluriversal forms of knowing. Grosfoguel (2007, 2011, 2013) further advanced these ideas by clarifying the *epistemic decolonial turn*, which involves challenging the epistemological privilege of Western modernity while revalorizing subaltern and non-Western epistemologies. With a similar lens but from a distinct perspective, Rezaire (2022) explores decoloniality through the prism of spiritual technologies and ancestral knowledge systems, emphasizing the importance of “decolonial healing”, spirituality, and embodied practices as critical dimensions of decolonial

thought. Rezaire argues that the colonial project did not only dominate lands and bodies but also disrupted cosmologies and spiritual practices, and that reconnecting with these suppressed forms of knowledge is an essential act of resistance and epistemic reclamation.

Decoloniality has been described as a theory of ‘non-theory’ (Paraskeva, 2022) because it resists the closure and universalism typically associated with Western theorizing altogether. Instead, it embodies an anti-foundational ethos that values “situated knowledges” (Mignolo, 2009), relational epistemologies, and pluriversal perspectives, acknowledging the legitimacy of diverse ways of knowing without subsuming them under a single theoretical model. In this sense, decoloniality is not the absence of theory but a critique of theory’s pretensions to universality and its complicity in sustaining colonial power structures.

Indeed, decoloniality is not without critique. Scholars such as Mezzadra (2020) argued that while decolonial thought offers a powerful critique of Eurocentrism and epistemic injustice, this “frantic search for cultures and ‘epistemologies’ existing outside modernity and its Eurocentric ‘colonial matrix of power’ leads him to continuously reinforce the border circumscribing the West” (Mezzadra, 2020, p.33). Mezzadra contends that decolonial perspectives may struggle to translate their critical insights into structured, actionable frameworks for analyzing contemporary phenomena, particularly in fields like migration studies, where systemic structures intersect with lived mobilities in complex ways. Veeran Naicker (2023) critiques decolonial theory for constructing an epistemological reversal that sometimes lacks engagement with structural dynamics (e.g., capitalism, institutions). Other commentators note that some decolonial approaches risk remaining descriptive or oppositional without substantive proposals for societal transformation.

Despite the criticism levelled against decolonial theory for its perceived ‘failures’ and lack of a unified analytical framework, its significance for this research lies precisely in its refusal to impose a universal paradigm on complex, situated realities. For the study of South-South migration and its discursive constructions, decoloniality offers a necessary lens to interrogate the colonial residues embedded in the language and epistemologies of migration studies, while opening the possibility for pluriversal, context-sensitive interpretations that foreground Global South perspectives.

In adopting a decolonial approach, this research aligns with what is increasingly emerging as a *new zeitgeist* within migration studies: the recognition that no single theory can sufficiently capture the multidimensionality of migration phenomena. De Haas (2014), a prominent advocate of eclecticism in migration studies, argues that drawing on multiple theoretical perspectives is not merely a methodological compromise but a necessary epistemic stance for understanding the complexity of migration processes across contexts. Eclecticism in migration studies thus allows scholars to draw critically from diverse theoretical traditions while interrogating their limitations and colonial assumptions. The decolonial framework enables the present ‘critique’ to remain theoretically rigorous while avoiding epistemic *obedience* to any single, Northern-rooted model, embracing instead a layered, reflective, and an approach capable of capturing the peculiarity of South-South migration, challenging the binaries (Global North/South, regular/irregular, emigrant/immigrant) and universal categories that often obscure the nuances of Southern mobilities. It also allows for a reflection on the legitimacy of producing “knowledge [...] beyond bodies and places” (Mignolo, 2009, p. 177), acknowledging how Global North scholars and frameworks have historically dominated the theorization of migration, even when the empirical focus is on the South.

Nonetheless, adopting an eclectic decolonial lens does not imply abandoning all existing theories but entails critically re-engaging with them, identifying their colonial residues, and reworking them in conversation with Southern epistemologies and situated knowledge(s). This approach aligns with the objective of this research: to decenter Eurocentric mappings of migration and to contribute to the re-theorization of South-South migration from within the Global South, resisting the epistemic obedience that has often characterized the application of migration theories to contexts for which they were not designed.

3. Methodological Insights: Semi-Systematic Literature Review

The methodological choice to conduct a targeted, theory-focused literature review in this research stems from the need to critically map and interrogate the status quo of migration theorization before articulating a decolonial, eclectic re-reading. Migration studies have historically been dominated by what Skeldon (1990) describes as dual and polarized paradigms reflecting either optimistic or pessimistic lenses on mobility³⁷. The first paradigm, rooted in Ravenstein's laws and neoclassical economics (Todaro, 1969), frames migration as a linear, development-driving process driven by wage differentials and rational individual choices. The second paradigm, associated with dependency and structuralist perspectives, views migration as an outcome of structural inequalities, exploitation, and underdevelopment, reflecting the logics of world-systems theory (Wallerstein, 1974) and related critiques. Both paradigms struggle to explain contemporary South-South migration trends, such as the movement of sub-Saharan migrants to the Maghreb, challenging the traditional North-South orientation of these frameworks.

The third paradigm, while adopting a more critical stance by incorporating transnationalism, agency, and complexity, has often struggled to fully capture migrants' lived experiences and subjectivities. Scholars such as De Haas (2010) and Castles (2010) argue that although this paradigm seeks nuance, it frequently remains tethered to Eurocentric frameworks and methodological nationalism, inadvertently silencing migrants' experiences within South-South mobilities. These limitations underscore the need for a structured, critical review of migration theories to unpack how they continue to privilege Global North perspectives while inadequately theorizing layered realities of South-South migration.

3.1 Strategy and Protocol

To systematically interrogate the epistemic and discursive contours of migration theory, this study employs a semi-systematic, theory-focused literature review protocol explicitly tailored to study migration theorization and its uses in academia. Following extensive testing, Scopus and Web of Science were excluded as they did not yield paradigm-explicit theoretical discussions aligned with this review's goals. Instead, Google Scholar advanced searches, targeted author retrieval, then snowball sampling from reference lists and citation networks of key theoretical articles were used to ensure comprehensiveness while maintaining focus.

Searches were executed using structured "intitle" commands to ensure relevance and manageability, focusing explicitly on each paradigm:

³⁷ Skeldon, R. (1990), push-pull is "a platitude at best".

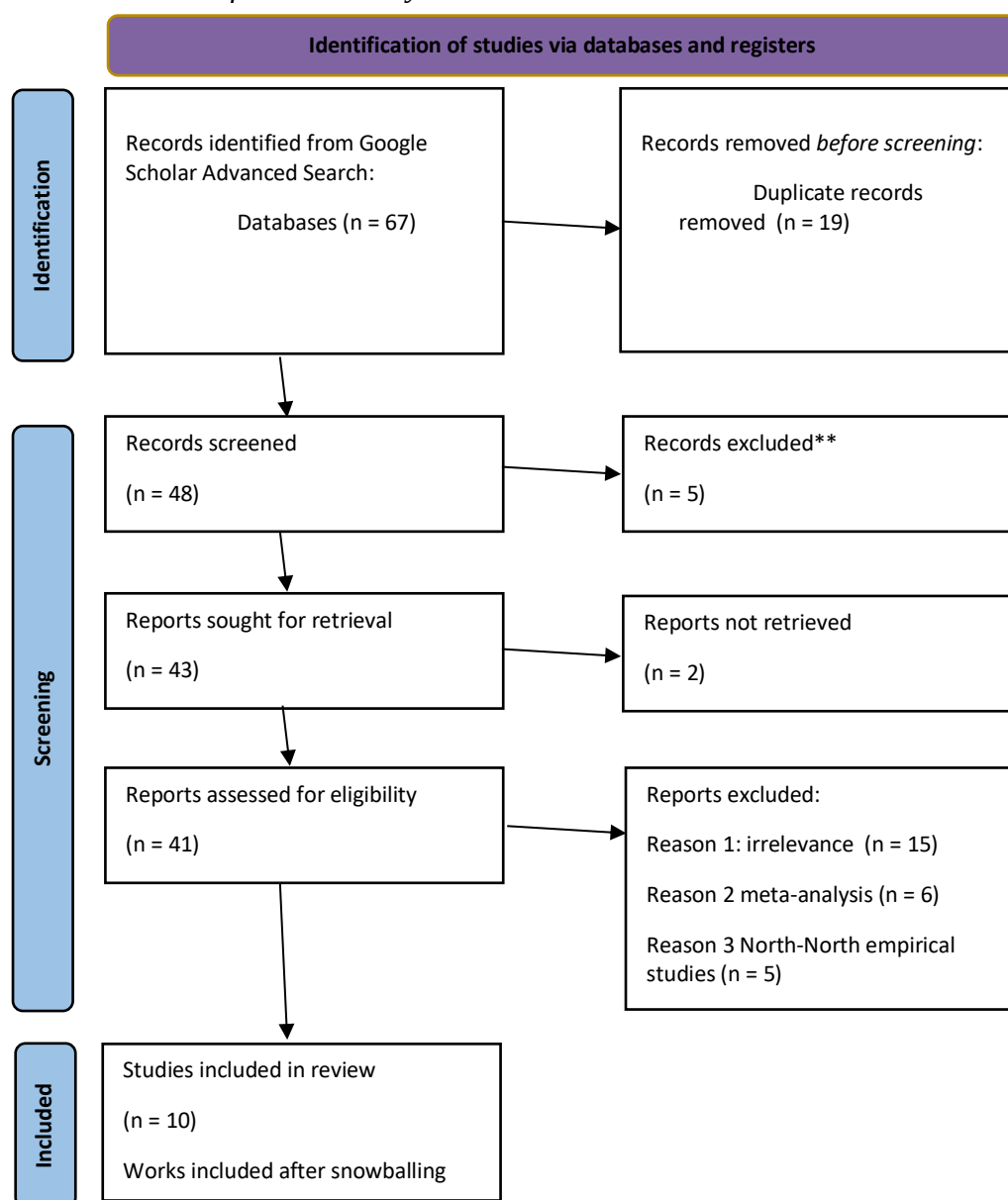
Table 1
Search Strategy by Paradigm and Command

Paradigm	Search command
Functionalism	intitle:"migration theory" AND ("neoclassical" OR "push-pull" OR "human capital" OR "NELM" OR "new economics of labor migration")
Historical-Structural	intitle:"migration theory" AND ("world systems theory" OR "dependency theory" OR "historical-structural" OR "dual labor market")
Third Paradigm (Meso-Level)	intitle:"migration theory" AND ("network theory" OR "cumulative causation" OR "transnationalism" OR "social capital")

Titles and abstracts were screened manually to retain studies that (i) explicitly discuss migration theories and (ii) engage with a specific paradigm under study. Full-text assessments confirmed substantial theoretical engagement, excluding studies with only peripheral mentions of theory. To ensure the inclusion of foundational theorists, additional manual anchor works (Ravenstein, Lee, Todaro, Stark & Bloom) were retrieved and included based on a snowball sampling (reviewing the reference lists of filtered studies to identify foundational works, Wallerstein eliminated as a non-migration theory but as a theory of World systems used in migration). These were included to ensure scholarly legitimacy (even when the works are outdated) while maintaining focus on theorization and some empirical case studies building on theory.

During this process, meta-theoretical and eclectic critique works (Skeldon, Favell, etc.) were identified but excluded from the final corpus as they represent meta-critiques and frameworks for critique rather than paradigm-defining foundational theories. They are, however, engaged in the discussion to frame the decolonial reorientation advanced later. This strategy yielded 30, 14, and 23 results, respectively, for the three paradigms, ensuring a manageable yet reflective corpus. The total 67 results are to be screened and sifted to eliminate duplicates (19), irrelevant studies and reviews. The process is summarized in the following PRISMA protocol. Following the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) guidelines (Page et al., 2021), the review followed four systematic stages: identification, screening, eligibility, and inclusion.

Figure 1
PRISMA Protocol for the Semi-systematic Review



Note. As shown in figure 1, these foundational works (04), identified through snowball sampling and paradigm relevance, were manually added to ensure theoretical continuity and paradigm representation.

3.2 Data Extraction

Each included work was manually coded for (i) key theoretical frameworks discussed; (ii) paradigmatic positioning (first, second, third); (iii) contributions and critiques relevant to understanding migration theory. This structured, theory-focused review thus provides a robust foundation for the critical, decolonial analysis advanced in the subsequent section. Rather than analyzing entire texts, we selectively extract only those segments where theorization is articulated or performed. These typically include the abstracts (when theoretical claims are made), introductions and literature review sections (where applicable), theoretical or conceptual framework sections, and discussion and conclusion sections (or ‘summary’ and ‘findings’ in some studies). We excluded empirical data sections, extended case analyses, and

methodological details unrelated to theoretical positioning. This ensures both methodological focus and analytical feasibility, given the scope of 14 core/ long texts. Each selected passage is compiled in a file with clear author-date headings (e.g. Zaman et al., 2023) and saved in individual files named systematically. The final corpus included 35,755 words. Although this study is a qualitative one, concordancing software (TextStat) is to be used to generate statistical information concerning the nomination strategies and deictic references, to corroborate and triangulate the qualitative findings.

3.3 Discourse Analytical Strategy

This study employs a Critical Discourse Analysis (CDA) approach to scrutinize the language and discursive constructions within major theoretical works on migration. The objective is not only to trace conceptual shifts but also to reveal the often-subtle ways in which power, ideology, and colonial residues persist in theoretical formulations. We specifically analyze how migration theories construct their objects of knowledge, i.e., migrants, migration processes, and global hierarchies, through language/ discourse. Indeed, by employing CDA, we aim to identify colonial residues and epistemic hierarchies, including Eurocentric assumptions or Global North epistemic dominance. We also examine binaries and oppositions, or antagonistic treatments (e.g., legal/illegal, forced/voluntary, Global North/South) that structure migration thinking.

Furthermore, discursive silences (as discussed by Wodak, 2020) and voice annihilation (Hlioui, 2024) such as the absence of migrant voices, or decolonial perspectives are sought as objects of analysis in addition to deictic structures and peculiarities that position actors and spaces relationally (e.g., “receiving countries” vs. “sending countries”). In line with Wodak (2001) and van Leeuwen's (2008) frameworks, we examine the nomination and predication strategies used to refer to migrants and their mobility, alongside broader epistemic positioning (i.e., whose knowledge counts, and who gets to speak) divulged by the argumentation schemes (topos, topoi).

Following extraction, a CDA-informed coding framework (second coding stage) is applied to each excerpt.

Table 2

Coding Strategy by Discursive Categories and Guiding Questions

Category	Guiding Questions
Nomination / Predication	How are migrants named and described? What attributes are assigned to them?
Agency Framing	Are migrants portrayed as actors, victims, threats, or policy targets?
Deictics / Spatial Structuring	How is space referenced? Who is “here” vs. “there”?

Epistemic Positioning	Whose voice speaks the theory? Are Global South scholars/ migrants cited or excluded?
Binaries	Are dichotomies (e.g., legal/illegal, skilled/unskilled) used uncritically?
Silences / Absences	What is left unsaid? Who is “silenced” and how? What alternative framings are omitted or erased? (symbolic annihilation/ degradation)

As shown in Table 2, the coding followed a two-entry process. The first step consists of attaching general codes to each study, then using the guiding questions and discursive categories, sub-codes are assigned to each study based on the nomination/ prediction of migrants for instance, or silences about migrants/ origin countries, etc.

4. Findings and Discussion

Migration theory has historically sought to explain the causes and patterns of human mobility, yet much of its conceptual landscape remains fragmented, overly reductionist, or positivist and grounded in Northern epistemologies. Foundational paradigms, whether neoclassical, structuralist, or transnational, have contributed useful insights but tend to privilege economic rationales or systemic forces while underrepresenting the complexity of migrant agency, especially in South-South contexts like sub-Saharan mobility to the Maghreb. Despite recent calls for theoretical pluralism and conceptual eclecticism (De Haas, 2021; Massey et al., 1993), mainstream approaches continue to overlook the lived realities, aspirations, and epistemic locations of migrants from the Global South.

As this analysis will show, there persists some colonial assumptions, visible in the dominant deixis, categories, and abstractions used to theorize migration, limiting the field’s capacity to engage with South-South migration on its own terms. Building on this theoretical corpus, the present study proposes a decolonial reconceptualization of migration theory. Through Critical Discourse Analysis (CDA), it interrogates how dominant paradigms and studies reproduce colonial hierarchies, using discursive strategies such as nomination, predication, perspectivization, argumentation, and deixis (van Leeuwen, 2008; Wodak, 2001). This lens enables us to move beyond the reductive question of “why people move” to address deeper issues of representation, power, and epistemic injustice in the theorization of migration.

4.1 Constructing Migrant Identities

Discursive strategies of nomination and predication within the corpus frequently construct migrants in narrowly economic terms— such as “labor migrants” (25), “migrant stock” (9), “migrant/ immigrant workers” (15) – reflecting an underlying reliance on rationalist paradigms. While often presented as neutral descriptors, terms such as “labor migrants” or “migrant stock” draw upon and reinforce categories rooted in Western political economy, particularly the liberal-capitalist emphasis on labor as an economic input. As Grosfoguel notes, these paradigms reflect the “economic reductionism” (2011, p.1) that has always shaped Eurocentric epistemology, prioritizing extractive logics over lived experiences or alternative ontologies. Migrants are frequently labelled as “labor migrants,” “migrant workers,” “migrant stock,”

“immigrant population,” or “sources of remittances.” This nominal strategy reduces the subjectivity of migrants to functionalist categories, following van Leeuwen’s functionalization strategy, in which social actors are represented in terms of their roles or uses.

The surveyed collocations of ‘migrant’ are mostly economic “immigrant labor,” “economic migrants,” “labor immigrants, students or refugees”, “different types of immigrants... can be assumed to produce the same results related to immigration”. Grosfeguel expresses his indignation at this economist fixation when he says “ the capitalist world-system would be primarily an economic system that determine the behavior of the major social actors by the economic logic of making profits as manifested in the extraction of surplus value and the ceaseless accumulation of capital at a worldscale” (2011, p. 7). As such, migration theory “privileges economic relations over other social relations” (2011, p. 7), which explains the quasi absence of social or cultural analysis of a phenomenon which is deemed socio-cultural par excellence (except for one study, Munasinghe et al., 2024)

Such discursive representations flatten lived experiences into economic abstractions. As Quijano (2000) argues, this reflects the coloniality of knowledge, where non-Western lives are only legible through Eurocentric frames of productivity and function. Mignolo would describe this as part of the “colonial matrix of power,” (2023) which continues to structure global hierarchies through seemingly neutral categories.

In Wodak’s terms (2001), the topos of usefulness dominates this theorization sample: migrants are framed in terms of their contribution to GDP, labor market needs, or demographic utility. For instance: “[m]igrants as contributors to GDP,” (Wadood et al., 2021) and “sources of economic development” (Naimul et al., 2023), as well as assigning them an econometric predicate such as inflow, influx, potential, risk, proportion, market, etc. These expressions invoke argumentation based on utility, reducing migration to a calculable phenomenon and excluding affective, cultural, and political dimensions of migrant life.

Beyond the economic rationalization of migration through the topos of utility, the corpus also reveals discursive patterns of aggregation and amalgamation, whereby migrant identities are reduced to undifferentiated masses. This is divulged by strategies of impersonalization (van Leeuwen, 2008), wherein migrants are not represented as individual social actors but as abstract entities, flows, or quantities. Expressions such as “international migrant stock” (Naimul et al.), “immigrant labor”, “migrant population”, or “generations of migrants” exemplify a semantic shift in which the migrant becomes a demographic category rather than a socio-political subject. Further instances from foundational migration theorization like “body of migrants”, “currents of migration”, “filled up by migrants” (Ravenstein, 1889) evoke imagery of inanimate, indistinct collectives, subject to movement and absorption by structural forces.

This is especially visible in the archival expression: “setting in the direction of the great centers of commerce and industry which absorb the migrants” (Ravenstein, 1889). Here, the verb “*absorb*” performs an objectifying function, suggesting that migrants are passively consumed by capital, as though they were inputs into a spatial-economic apparatus. Furthermore, this postulate is not applicable in South-South contexts, where migrants are ‘drawn’ to places which are not centers of commerce or industry and are not ‘absorbed’ by them. Ravenstein’s rules are anachronistic but seem to be still present in today’s theorization³⁸ (partially in criticism). These expressions, bounding the migrant to a preconceived economic

³⁸ On Google Scholar Ravenstein’s *Laws of Migration* is cited 8182 times (1885 version) and 3799 times (1889 version), which is odd regarding the date and revisions of this work.

identity, reflect what Mignolo (2009) identifies as the “coloniality of his being” (p.176)– the discursive reduction of human subjects to categories compatible with the political economy of modernity/ coloniality.

Such terminology also engages the topos of quantity/ numbers (Wodak, 2001), whereby the volume or scale of migration is foregrounded over the differentiated experiences and socio-cultural peculiarities that underpin (im)mobility. Migrants are not represented through their individual subjectivities or socio-historical specificity but as interchangeable units in statistical, economic, or policy discourse. For example, “different types of immigrants can be assumed to produce the same results related to immigration” (Rauhut et al., 2023) and “equally skilled immigrants and natives are perfect substitutes” (Borjas et al., 2011).

This logic of fungibility³⁹ echoes Favell’s (2022) critique of how mainstream migration theory often fails to question its own assumptions about value and commensurability, grounded in Western rationalist economic models. In rendering migrants equivalent in output or substitutability, such framings depoliticize mobility, detaching it from histories of imperial labor extraction, racialized stratification, and border agency. The outcome of these identity characteristics, attributed to migrants in the corpus, is what Mignolo strictly calls ‘identity politics’ when he says “[a] politics of identity is different from identity politics – the former is open to whoever wants to join, while the latter tends to be bounded by the definition of a given identity” (2009, pp. 172-73).

Van Leeuwen’s concept of genericization is particularly relevant here: terms like “labour immigrants, students, or refugees” are listed in a manner that erases internal distinctions. This treatment collapses diverse legal, political, and experiential categories under a single operational function, i.e. their usefulness to host economies. Genericization is a strategy used to portray social actors not as specific individuals but as general types or classes. This can be linguistically realized through the plural without an article, as in “[n]on-European immigrants make up 6.5 percent of the population” (van Leeuwen, 2008, p. 36). This construction renders the social actors as a homogeneous group, emphasizing collectivity and overgeneralizing a trait to all members of the group equally. By the singular with the definite or indefinite article, for example: “‘the’ (im)migrant” (21 times)”. Here, the singular form is used, generically, to represent a prototypical member of the category, erasing internal diversity and reinforcing colonial stereotypes. In migration discourse, such genericization supports objectification and epistemic flattening. It aligns with topoi of aggregation, utility, and risk, reducing migrants to functional roles or statistical figures rather than recognizing them as historically and culturally embedded.

Similarly, references to “migrant stock” and “past migrants” aggregate individuals into temporally fixed, quantifiable, and predictable units. Even when distinctions are drawn (e.g., “low-skilled vs high-skilled”; “brain drain” vs “brain gain”), they often reproduce the same market-based logic, categorizing migrants based on potential for contribution or threat, rather than historical or relational positioning within the global economy. These framings frequently

³⁹ Fungibility is an economic term that refers to something that is interchangeable with another item of the same type, a bargain. When applied to migrants, the “fungibility” suggests that migration theorization discourse represents different kinds of migrants (e.g., “skilled immigrants,” “migrant workers”) as if they are equivalent, substitutable, and devoid of unique political, cultural, or historical identity. This mirrors a market logic that prioritizes efficiency and utility over complexity.

marginalize gendered and racial perspectives, while pretending to offer a “universalistic, neutral, objective point of view” (Grosfoguel, 2011, p. 4) which is rather the illusion of neutral, universal knowledge that obscures the positionality and specificity of individuals, especially in the ‘Global South’.

This amalgamative logic, combined with the nominal silencing of intra-group distinctions (e.g., “our participants,” “Bangladeshi students”), not only reiterates illusive homogeneity but also reproduces colonial discourses in which the ‘colonized’ or ‘subaltern’ were spoken of *en masse*— as populations to be calculated, assessed, and managed, rather than agents with a voice (Hlioui, 2023).

While older migration theories framed migrants primarily as labor units, contemporary scholarship often shifts toward governance and regulatory discourse. However, this transition preserves colonial hierarchies under the guise of bureaucratic neutrality. Migration is increasingly described using impersonal and technocratic vocabulary: “transient and disposable labor,” (Paul & Yeoh, 2021), “regulate international migration, and particularly illegal immigration” (Schuck, 1998, as cited in Hollifield & Brettel, 2000), “inflow,” “influx,” “potential,” “market regulation”, etc. Here, impersonalization (van Leeuwen, 2008) is evident, as migrants are referred to in terms like “flows,” “currents,” or “stocks,” abstracting them from social and political contexts.

In the corpus, migrants are frequently represented through hierarchical binaries—“high-skilled/low-skilled,” “legal/illegal,” “documented/undocumented,” “economic/labor/refugee”— which again reflects this fixation on categorization as a discursive strategy (van Leeuwen, 2008), constructing differential moral, economic, and legal worth when dealing with migrants. This inclusion/exclusion or ingroup/outgroup language is served through seemingly objective, “scientific”, and neutral sub-labels like in “brain drain,” “brain gain,” “repeat migrants,” “short-journey migrants,” “long-journey migrants,” “lower-tier migrants”, etc.

It is worth noting that within the analyzed corpus, the term ‘immigrant’ (arriving) appears 75 times, in stark contrast to ‘emigrant’ (leaving), which is mentioned only 3 times. Additionally, the adjectives ‘illegal’ and ‘legal’ are used 7 and 10 times respectively. This lexical asymmetry is not merely quantitative but deeply epistemological: it reflects and reproduces a hierarchical binary between receiving and sending countries, implicitly naturalizing the Western-centric gaze that frames movement primarily from the perspective of the ‘Global North’ as a sought El dorado for all the ‘subjects’ of the poor ‘Global North’, rendering this theorization myopic and biased, inadequate to address the peculiarities of the very rich and complex South nations.

Informed by Quijano’s (2000), this terminology reinforces the idea of migrants as subjects to be received, used, and categorized— rarely as agents with epistemic ‘agency’. The near-erasure of the term ‘*emigrant*’ underscores a neglect of origin contexts, thus de-historicizing the act of migration and situating it within destination-centered logics, which Mignolo (2009) would identify as part of the colonial difference in knowledge production. Similarly, the invocation of ‘*illegal*’ and ‘*legal*’ suggests a discursive policing and bordering of mobility, where movement from the South is framed in terms of legitimacy, echoing the remaining and renewed post-colonial hierarchies, structuring global mobility regimes (inter alia Visa politics).

4.2 Silencing of Agency and Epistemic Annihilation

Favell's (2022) critique of mainstream migration theory's complicity with state-centric and policy-driven logics is of great significance here as, to him, migration theorization encodes postcolonial power asymmetries under the guise of neutrality. By foregrounding *'immigrant'* as the dominant category, migration literature recenters the destination states as primary loci of analysis and marginalizes alternative vocabularies of movement, such as *'diaspora'*, *'transit'*, or *'forced displacement'*⁴⁰, many of which are embedded in Southern histories and geographies. In doing so, the discourse performs what Bhambra (2014) calls a *'methodological whiteness'*—a form of epistemic closure that universalizes Northern assumptions and analytic categories, ultimately contributing to what de Sousa Santos (2022) calls *epistemicide*—the systematic destruction of non-Western knowledges, particularly through colonialism, imperialism, and Eurocentric science. He connects this to legal, scientific, and political structures that *silence* and *erase* indigenous, African, and Southern epistemologies.

Such *'annihilation'* is not always overt; rather, it operates subtly through classificatory logics, lexical choices, and theoretical borrowings that render the South knowable only through the conceptual apparatus of the North. Within the Discourse Historical Approach (Wodak, 2001), these patterns are understood through *topoi*—argumentative mechanisms that structure public and academic discourse. The *topos* of classification and comparison is salient in statistical framings such as “[i]mmigrants born in the Middle East/North Africa, Southeast Asia and Sub-Saharan Africa received net transfers from the natives... while immigrants born in South Asia, East Asia, Eastern Europe and Caucasus, Latin America and Western countries produced net transfers...” (Rauhut et al., 2023).

This formulation does more than quantify; it constructs a discursive hierarchy of migrant value by region of origin, implicitly racializing subjects through economic productivity while avoiding explicit racial language. By sorting migrants according to their fiscal *'burden'* or *'contribution,'* (recurrent mentions of tax (5), contribution (10), etc.) the discourse reproduces colonial patterns of capitalist stratification that assign worth to populations based on proximity to Northern ideals of economic rationality and utility. As Grosfoguel argues, such hierarchies are part of a longer epistemic tradition of “global hierarchy” that has systematically erased the legitimacy of non-Western peoples and knowledges:

This epistemic strategy has been crucial for Western global designs. By **hiding the location of the subject of enunciation**, European/Euro-American colonial expansion and domination was able to construct a **hierarchy of superior and inferior** knowledge and, thus, of superior and inferior people around the world. We went from the sixteenth century characterization of “people without writing” to the eighteenth and nineteenth-century characterization of “people without history,” to the twentieth-century

⁴⁰ It is important to acknowledge that terms such as *diaspora*, *transit*, and *forced displacement* do appear in broader migration studies literature, particularly in interdisciplinary analyses concerned with media representations, bordering practices, surveillance, and migration policies. These studies often draw on critical theory and cultural analysis to interrogate the lived experiences of mobility and the politics of representation. However, their relative absence in the core corpus of migration theory under analysis here is telling. Their exclusion from theoretical formulations suggests a disciplinary gatekeeping that privileges economic, demographic, and state-oriented categories, thereby delimiting what constitutes “theoretical” knowledge in the field. As such, the migration theory corpus remains structurally resistant to vocabularies that foreground historical violence, displacement, and diasporic agency, despite their centrality in the lived realities of many migrants.

characterization of “**people without development**” and more recently, to the early twenty-first-century of “people without democracy”. (Emphasis mine) (Grosfoguel, 2011, p. 6)

What appears as a technocratic exercise in statistical objectivity is, in fact, an epistemic performance that enacts symbolic annihilation. It contributes to the colonality of knowledge by encoding a logic in which entire regions and populations are discursively relegated to lesser status— not only in terms of economic worth but in their very capacity to be seen as historical, developed, or democratic subjects. Thus, it seems that migration theory not only classifies mobility, but it also classifies humans themselves.

This classification of ‘humanity’ is entrenched in ‘symbolic annihilation’, a concept rooted in the symbolic interactionist tradition, originally coined by Gerbner (1972) to describe the media's omission or underrepresentation of certain social groups— whether defined by race, gender, origin, sexuality, or status. Tuchman (1978) extended the term to include not only invisibility but also the ridicule or belittlement of marginalized groups, thereby emphasizing the broader spectrum of exclusion that undermines their social agency and visibility. Commonly applied to women and sexual minorities, symbolic annihilation explains how skewed or absent representation contributes to the disempowerment and social erasure of entire communities. These representations— or lack thereof— send implicit messages about the perceived worth and legitimacy of these groups, reinforcing existing hierarchies. In migration studies, symbolic annihilation offers a valuable analytical tool to explore how different migrant groups are either validated or silenced. The framework also parallels Spivak’s notion of the *subaltern*—those denied the capacity to speak or be heard in dominant discourses (Spivak, 1988). Both symbolic annihilation and subalternity articulate the structural mechanisms by which certain voices are excluded, distorted, or erased.

The erasure of migrant agency, as drawn from symbolic interactionism, is seen in their depiction as reactive to external economic stimuli rather than as political agents with complex positionalities. Phrases such as “migrants respond to wage differentials” and “[t]he discernible contrast in job availability between Bangladesh and foreign nations accentuates the allure of overseas employment opportunities” invoke the topos of cause-effect, reducing human movement to rational economic calculus. This framing strips migration of its political, historical, and affective dimensions and reframes it as a depoliticized response to structural inequities. Notably, even Southern-authored studies replicate these frames, often adopting neoclassical or world-systems paradigms without questioning their epistemological assumptions. One such example reads, “behaviors or practices are structuring and patterning through time and space” (Rai, 2024). The abstractness of this formulation exemplifies what Favell (2022) critiques as epistemic mimicry, i.e., the deployment of dominant theoretical vocabularies by Southern scholars in ways that reproduce rather than subvert hegemonic knowledge structures. This results in discursive epistemic subalternity, where Southern experiences are analyzed but not theorized from within.

In our corpus, even in studies where ‘agency’ is sought to be examined like de Haas (2021), the paradigm in question has its own limitations. Despite its ambition to unify existing approaches and move beyond binary paradigms, de Haas’s (2021) aspirations—capabilities framework presents significant lacunas, particularly when applied to South–South migration and contexts of deep border inequality. De Haas reconceptualizes migration as “the function of people’s aspirations and capabilities to migrate within given sets of perceived geographical opportunity structures”, attempting to shift focus away from deterministic push-pull models by integrating human agency. However, this framework ultimately reinscribes a positivist logic

that assumes both aspirations and capabilities can be objectively identified and studied, regardless of structural constraints imposed by border regimes and colonial geographies. While it purports to recognize that capabilities are unequally distributed, it nevertheless treats aspirations as analyzable variables, detached from the discursive and epistemic violence that shape them. In postcolonial South–South contexts such as sub-Saharan migration to Tunisia, aspirations themselves are often fractured by disillusionment, misinformation, and shifting socio-political narratives—none of which are easily captured through de Haas’s abstracted language of “opportunity structures.” The model presumes that migrants operate within a globally legible field of choices, when in fact, colonial continuities, embedded in border control, legal status, and racialization, render aspirations untranslatable into capabilities, or even epistemically illegible in the first place.

Moreover, by framing migration as a “positive function” of aspirations and capabilities, de Haas’s theory risks a utopian idea— a subtle but persistent assumption that migration, if understood rationally and managed effectively, can be optimized or improved. This optimism neglects the affective and racialized violence at play in South–South migration, where “capabilities” are not merely about access to resources but are deeply shaped by symbolic annihilation, state abandonment, and epistemic erasure. In these contexts, the very desire to move— let alone the ability to do so— is continually mediated by policies that render sub-Saharan migrants or Maghrebi harraga as either invisible or hyper-visible threats. In failing to account for the non-linear, ambivalent, and historical realities of migration in the Global South, the aspirations-capabilities framework remains partially equipped to engage with it. While de Haas rightly critiques mono-causal explanations, his framework stops short of interrogating the coloniality of knowledge and grammar within migration studies, an omission that limits its transformative potential.

The treatment of gender within the corpus is similarly revealing as to this ‘silencing’. Remarkably, female migrants appear scarcely, and predominantly through abstracting lenses, as illustrated by statements such as, “females appear to predominate among short-journey migrants”, and “females predominate among those migrants who go only short distances, and even in entire provinces” (Ravenstein, 1889) or “international migration stock of Bangladeshi origin....the percentage of females was about 33 per cent” (Wadood, 2021). These formulations exemplify passivation (van Leeuwen, 2008), a strategy whereby agency is removed from social actors. The rarity of their appearance (limited to three brief mentions across the corpus) compounds this erasure. When gender is addressed at all, it is often in terms that materialize patriarchal and colonial tropes, presenting women as statistical anomalies, passive followers, or auxiliaries of male migration.

This mode of representation aligns with what symbolic interactionism identifies as *symbolic degradation*, the process by which individuals or groups are not only marginalized in discourse but also stripped of their capacity to produce meaning about their own conditions (Gerbner 1976). In the context of migration theorization, the invisibilization of women, paired with their occasional statistical inclusion, does not repair the epistemic void; rather, it institutionalizes it under the guise of neutral measurement. Feminist theory has long critiqued the technocratic framing of gender as a ‘variable’ to be quantified, arguing instead that such reductive approaches erase the lived experiences and intersectional identities of women on the move (Spivak, 1988). The reliance on abstract demographic figures reflects what Harding (1991) calls ‘god-trick objectivity’, where knowledge is presumed to come from nowhere, disembodied, apolitical, and universal— thus foreclosing women’s situated perspectives.

From a decolonial feminist standpoint, such as that of Rezaire (2022), this epistemic framing constitutes not only erasure but an extension of coloniality into the realm of gender. Here, women's bodies— particularly those racialized and from the Global South— are not constructed as producers of knowledge on migration or even the main object of empirical research. This discursive pattern mirrors what de Sousa Santos (2007) terms *abyssal thinking*: a boundary between what counts as knowable and what is relegated to the epistemic abyss. In this framing, Southern female migrants exist only as numbers or by-products of the migratory phenomena not as agents of their journeys nor as theorists of their own condition. By removing agency and voice, the discourse both simplifies and silences the complexities of migrant women's trajectories, ultimately contributing to a broader symbolic annihilation (Tuchman, 1978).

4.3 Global 'South' and 'North' Dichotomy: Periphery and Center

The corpus consistently reaffirms a geopolitical and epistemological divide between the Global North and South, a dichotomy that functions as both an analytical lens and a hidden hierarchy. The use of these terms dates back to the late 20th century, particularly gaining traction after the end of the Cold War, as the older 'First–Second–Third' World terminology became obsolete (although oddly still used in Arabic and in the South). Initially emerging from the Brandt Line in the 1980s— a visual demarcation separating the wealthy North from the poorer South proposed in the *Brandt Report* (viz Singer, 1980)— the terms *Global North* and *Global South* evolved as shorthand to describe asymmetries in wealth, power, and knowledge, rather than merely geographic location. By the 1990s and 2000s, these labels were increasingly adopted in development, postcolonial, and critical global studies to signal postcolonial structural residues.

Within the corpus, this dichotomy is subtly encoded through deictic strategies, particularly in the recurrent use of spatial and referential deixis (e.g., “host vs. origin countries,” “sending vs. receiving nations”). Such language symbolically centers the Global North as the locus of theory, and epistemic legitimacy, while relegating the Global South to a peripheral positionality— a space often described in terms of instability, departure, or intervention. This discursive structure mirrors Wallerstein's world-systems theory (even implicitly) where knowledge flows mirror economic and political ones: from core to periphery. The persistent use of the Global South as a site of data and of Southerners as ‘guinea pigs’ of experimentation rather than speaking agents, reflects what decolonial scholars, such as Grosfoguel (2011) and de Sousa Santos (2014), call epistemic extractivism. In this discursive economy, Southern locations are “known” by Northern theorists, but rarely recognized as sites of autonomous theorization.

Collective deictic terms, such as ‘sending countries’ (typically referring to Africa, Asia, and Latin America) and ‘receiving countries’ or ‘destination’ (frequent 51 times and implicitly the Global North), reinforce a binary spatial ordering. This discursive centering serves not merely as a descriptive convenience but as a mechanism that situates the North as the normative and analytical point of reference. As Grosfoguel (2011) and Mignolo (2009) observe, such forms of geographic deixis conceal the “locus of enunciation” behind an illusion of neutrality, masking the epistemic dominance of Northern institutions that frame and validate knowledge production. The spatial metaphor of the “South” as origin and the “North” as destination functions symbolically to naturalize linear, unidirectional flows and to obscure complex migratory circuits, including North–South migration, and particularly South–South dynamics.

The linguistic asymmetry in the corpus is telling. Although the ‘South’ appears 46 times, in contrast to 22 instances of the ‘North,’ this visibility does not signify epistemic centrality.

Rather, it reflects the South's discursive overexposure as an object of study— an experimental field for the theories constructed and validated in Northern academic spaces. Europe is mentioned 38 times, Asia 28, and both Africa and America 21 times each. Yet, these mentions rarely signify the regions as producers of theoretical insight; instead, they are positioned as sites of 'migrant production'. This frequency, yet again, underscores the operation of what Grosfoguel terms the "point zero" epistemology— the Eurocentric god-eye view that claims universality by erasing its own partial, situated perspective.

This representational asymmetry is further entrenched through the near-exclusive use of Northern theoretical models, such as assimilation and integration paradigms. Assimilation is mentioned ten times in the corpus, while integration appears only four times, a discrepancy that reveals not only the endurance of older, linear models of migrant 'accommodation' but also the implicit valuation of homogeneity over plurality. The preference for 'assimilation' and its collocates as a theoretical and policy framework signals a form of epistemic mentoring— Southern migrants are expected to adapt to Northern norms without recognition of their histories, identities, or alternative epistemologies.

Deictic centering on the North also aligns with broader mechanisms of epistemic 'erasure'. Migration is theorized primarily from Northern vantage points, with little engagement with Southern scholarship or context-specific knowledge production. The works of Quijano (2000) and Grosfoguel (2011) remind us that this imbalance is not simply about authorship but about epistemological authority. The migration of sub-Saharan Africans to Tunisia— an example of South–South mobility— rarely appears as a site for theory generation. Instead, it is treated as a derivative or exceptional case, to be interpreted through frameworks built to explain South–North migration.

This bias extends to the uncritical adoption of state-based classifications— legal/illegal, regular/irregular, old/new migration flows which reflect the administrative logic of border regimes more than the lived realities of mobility. As De Haas (2014) and Bakewell (2010) argue, such binary categories are embedded within state-centric epistemologies that silence informal, subaltern knowledge(s) and perpetuate the fiction of the state as the sole arbiter of migratory legitimacy. Within this discursive regime, the complexities of informal economies, undocumented mobilities, and alternative forms of community-making in the South are rendered illegible.

While a significant number of authors in the corpus— such as Zaman et al., Munasinghe et al., Wadood et al., Rai, and Mansurov— are from the Global South, their scholarly output does not necessarily reflect epistemologies grounded in Southern lifeworlds or intellectual traditions. Instead, many operate within inherited Northern paradigms such as push-pull theory, dependency theory, or structural theory. This cannot simply be read as mimicry or epistemic compliance; rather, it reflects the structural embeddedness of these scholars within a global academic hierarchy shaped by colonial and institutional dependencies. A closer look into their academic trajectories often reveals training in Western institutions, publication in journals priming Eurocentric frameworks, or employment within research environments shaped by Global North funding and evaluation metrics. As Grosfoguel (2011) argues, coloniality persists not only through *who* speaks but through *what* and *how* one is allowed to speak. This dynamic illustrates that authorship from the South, in the absence of epistemic disobedience or pluriversal grounding (Mignolo, 2009), can still reproduce the symbolic erasure of Southern experiences. It also reinforces the imperative, as Santos (2014) asserts, to move beyond geographic inclusion toward cognitive justice. Grosfoguel (2011, p. 4) notes:

This is not only a question about social values in knowledge production ... The main point here is the **locus** of enunciation, that is, the geo-political and body-political location of the subject that speaks. In Western philosophy and sciences the subject that speaks is always hidden, concealed, erased from the analysis. The “ego-politics of knowledge” of Western philosophy has always privileged the myth of a **non-situated “Ego”**. Ethnic/racial/gender/sexual **epistemic location** and the subject that speaks are always decoupled. (emphasis mine)

In Western epistemologies, he explains, the subject who speaks is systematically concealed under the myth of a universal, non-situated “Ego”, effectively decoupling knowledge from the speaker’s ethnic, racial, gendered, and geopolitical position. This has profound implications for Global South scholars who— despite their origin— may be interpellated into this myth of epistemic neutrality, thereby reproducing dominant discourses rather than disrupting them. The reproduction of dominant theories by Southern scholars is thus better understood as a symptom of epistemic dependency. What Syed Hussein Alatas (1974) termed the ‘captivity of the mind’— rather than as evidence of epistemic diversity. As such, authorship from the South, in the absence of epistemic disobedience (Mignolo, 2009) or a delinking from colonial structures of knowledge, can still participate in the symbolic erasure of Southern positionalities. This reinforces the imperative, as Santos (2014) asserts, to move beyond geographic inclusion toward cognitive justice— where the conditions of knowledge production (funding, research institutions, access to academic platforms and networks, language of publication, university rankings, etc.) are scrutinized as rigorously as its content (theories, data, maps, representations, narratives, etc.).

4.4 Crisis of Migration Theorization: Toward a Decolonial Grammar of Migration

Migration theory (except for some eclectic paradigms) is in a state of conceptual paralysis. Despite the proliferation of models, typologies, and paradigms, it has proven analytically inadequate for addressing emergent South-South migration trends. This is evident in the case of sub-Saharan migration to North African countries like Tunisia, where conventional frameworks— rooted in colonial logics and Eurocentric epistemologies— consistently fall short of offering meaningful or grounded explanations. These epistemologies assume universality while abstracting away the complexities of Southern realities.

The persistence of frameworks such as the gravity models, despite mounting criticism, exemplifies this epistemic impasse. Often presented as commonsensical, this model continues to dominate both policy discourse and academic theorization. It assumes that poverty, instability, and conflict ‘push’ migrants away from their countries of origin, while wealth and security ‘pull’ them toward more developed destinations. Yet, empirical evidence contradicts this binary logic. Countries with similar levels of poverty or political instability exhibit vastly different migratory behaviors. As Flahaux and de Haas (2016) show, development often increases mobility by expanding access to education, resources, infrastructure, and information, not by reducing emigration. This is the case for expatriates and so-called ‘digital nomads’ relocating from the Global North to the Global South in search of more affordable lifestyles, flexible labor regimes, and improved well-being.

These Southward flows— often toward cities like Bali, Dakar, or Tunis— challenge the conventional assumption that development only drives migration in one direction. Instead, they reveal how mobility is shaped by global inequalities in housing costs, digital infrastructure, climate, and even quality of life. Paradoxically, these migrants are rarely subject to the same securitized labels— such as ‘transit migrant,’ ‘irregular migrant,’ or climate refugee’-- that are

imposed on South-South movers. Their trajectories are framed as ‘lifestyle choices’ or forms of cosmopolitan mobility, whereas movements from the South are discursively coded as desperate, chaotic, or threatening. This asymmetry in representation further exposes the racialized and classed underpinnings of dominant migration theory, which continues to equate modernity, rationality, and freedom with Northern agency while pathologizing mobility from the South.

Another counter-argument, challenging gravity models, is that the data reveals that more developed African nations, such as Côte d’Ivoire, generate higher outflows of migrants compared to less developed ones like Cameroon or Senegal. This paradox becomes even more evident in the case of sub-Saharan migrants in Tunisia. Many originate from countries with relatively high development indices, such as Côte d’Ivoire, yet opt for destinations like Tunisia despite the country’s ongoing economic struggles. The push-pull model fails to explain these decisions: why, for instance, Congolese migrants might choose Tunisia over Algeria, despite similar ‘pull’ factors. Even more confounding is the continued migration to Libya following the 2011 conflict, despite the grave security threats it poses. These patterns undermine the simplistic determinism of push-pull dynamics and reveal the model’s inability to capture the layered and historically contingent nature of human mobility.

Equally flawed are the assumptions of neoclassical economics, which treats migration as a linear, rational choice made by atomized individuals seeking to maximize income. Such accounts not only decontextualize migration from its political and historical dimensions, but also fail to explain why most individuals in poverty-stricken areas never migrate. The model lacks a serious engagement with factors like colonial legacies, unequal global integration, or geopolitical histories that bind some nations more closely together than others (like the Sahara to the Maghreb through pre-colonial trade and caravans). It presumes a one-way trajectory toward ‘the free and modern world’ reducing migration to a mechanical response to income differentials and positioning the Global South as a waiting room for development.

Other models fare no better. Systems theory assumes a symmetrical exchange between sending and receiving countries, an assumption rarely borne out in South-South migration, where return flows are negligible or absent. The approach depends heavily on data that is often unavailable or unreliable in many African contexts. It also tends to obscure the micro-level dynamics and subjective experiences that drive migration, privileging structural over personal explanations.

Network theories, similarly, fall prey to reductionism. While useful in highlighting how social ties facilitate migration, they often efface the role of individual agency. By asserting that it is ‘networks’ rather than people who migrate, these theories sideline personal motivations, aspirations, and acts of resistance. Moreover, network models rarely account for the dissolution of migration pathways. They offer little insight into why some migration systems collapse or lose relevance over time—critical questions in the volatile context of African intra-regional mobility.

Across these paradigms, one finds a recurring erasure of migrant subjectivity. Human agency is abstracted or treated as epiphenomenal. Migration is imagined as either economically determined or socially preordained, with little room for the erratic, affective, and often contradictory impulses that animate movement. In short, these paradigms depoliticize mobility and dehistoricize the South. This discursive marginalization is symptomatic of what Grosfoguel (2011) has termed the “ego-politics of knowledge,” in which the subject of enunciation, i.e., the embodied, geo-political locus from which knowledge is produced, is systematically erased. The

supposed neutrality of Western theorizing obscures the fact that knowledge about migration is predominantly constructed from Northern perspectives, even when Southern scholars are involved. This critique compels us to scrutinize the positionalities of those producing migration knowledge, not merely their nationalities, but the institutions they belong to, their training, and their epistemic allegiances.

The crisis, then, is not only theoretical but epistemological. It stems from the inability or unwillingness of mainstream paradigms to decenter colonial frameworks and foreground the lived realities, political histories, and subjective trajectories of Southern migrants. The way forward must involve a decolonial grammar of migration: one that delinks from Eurocentric categories, reclaims the voices of the South, and foregrounds the heterogeneity of human mobility. Such a grammar would not merely revise existing models but reframe the very epistemological foundations of migration studies. It would embrace symbolic interactionism and narrative methodologies, situate knowledge production within its colonial histories, and prioritize pluriversal knowledge(s) that can account for the complexity of migration in a postcolonial world.

The answer comes from the migration theory domain itself, as the new spirit of eclecticism in migration theorization, or what Favell terms ‘Critical Migration Studies’, reflects a growing recognition of the inadequacy of rigid, monocausal models like push-pull or neoclassical frameworks. This shift toward conceptual eclecticism signals an attempt to reconcile macro-structural factors with meso- and micro-level dynamics, incorporating historical, political, and cultural dimensions often overlooked in earlier paradigms.

However, while this pluralist turn is a step solution forward, it still falls short of fully addressing the epistemic limitations rooted in Eurocentric assumptions. Much of this “novel” eclecticism continues to operate within Northern ontologies and methodological templates, rarely questioning the colonial legacies embedded in concepts like development, mobility, or even the nation-state.

5. Conclusion: *Quo Vadis?*

This study contributes to the emerging conversation about the shift in migration studies from orthodox, positivist, and policy-driven approaches toward a critical, cross-disciplinary reorientation rooted in cultural studies and decolonial thought. Echoing Favell’s (2022) call for a paradigmatic rethinking, it aligns with a broader ‘generational’ transformation within the field— one that privileges cross-disciplinarity and epistemological reflexivity over abstraction and empiricism. Migration is no longer treated solely as a quantifiable problem of governance or economic rationality but as a discursive, historical, and epistemic terrain shaped by power, racialization, and coloniality (Hlioui, 2024).

Through CDA, this study exposed how dominant theories reproduce reductive binaries and erase subaltern agency, particularly within South-South migration flows such as those from sub-Saharan Africa to Tunisia. Existing paradigms, even when pluralistic, largely remain influenced by Northern epistemologies and methodologies. The persistence of Eurocentric modeling such as ‘integration’, ‘bordering,’ or ‘un-gendering’ enforces what de Sousa Santos (2014) calls *epistemicide*, denying the validity of Southern modes of knowing and living migration.

This work proposes a decolonial ‘grammar of migration’, grounded in Symbolic Interactionism, intersectionality, and Southern theory. It crihtttiques the technocratic and

racializing logics of migration governance and suggest replacing them with situated, relational, and embodied understandings of mobility. In doing so, it contributes to a growing field that, as Favell suggests, is increasingly animated by “militant epistemologies,” activist scholarship, and critical cultural studies interventions. The case of sub-Saharan migrants in Tunisia, whether students, workers, and aspirants, regular or irregular, shows that migration is neither linear nor universally explained by economic gravity rationalities. Instead, it emerges as a culturally embedded and historically situated practice (Hlioui, 2024).

If decolonial critique exposes the epistemic violence and exclusions of dominant frameworks, ‘decolonial delinking’ offers a way forward. Rather than simply rejecting Northern paradigms, this approach advocates relationality, translation, and the co-construction of knowledge across epistemic borders. Migration theorization must actively relate with the lived realities, conceptual vocabularies, and historical trajectories of the South.

Practically, this requires a re-centering of Southern epistemologies so that migration studies may integrate African, Latin American, and Asian conceptualizations of movement, such as circularity, informality, kinship economies, and spiritual geographies, as valid theoretical foundations rather than data anomalies or punctual observations. In addition, epistemic partnerships are significant; researchers must engage in co-production with migrant communities and Southern scholars, foregrounding their voices in both methodology and authorship. This leads us to keyword innovation or as Favell argues, ‘new conceptual tools’. ‘Epistemic disobedience’ is an alternative to replace outdated frames like ‘brain drain/ gain’ or ‘integration failure’, ‘assimilation models’, etc. Finally, intersectional analysis, within an eclectic spirit, should go beyond macroeconomics to examine how race, gender, class, and colonial histories intersect in shaping migratory experiences, especially under regimes of humanitarian reason or securitized compassion.

In short, this study argues that the future of migration theory lies in embracing epistemic and critical plurality. The field must turn decisively away from statistical abstraction toward grounded, ethically accountable, and theoretically rich analyses. The road forward, then, is not merely to ask why migrants move, but to ask: who gets to know, and how is that knowledge made? Where we go next depends on our willingness to let migration theory itself migrate – across disciplines, borders, and epistemologies.

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Whose Trauma is Archive-worthy? Deconstructing Jewish Victimhood and Reframing the Discourse on the Gaza War through Digital Counter-Archives

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Abstract

Trauma theory has become inextricable from the Holocaust. While the Holocaust's importance as traumatic is understandable, concerns about the near absence of global interest in other traumas is legitimate. This chapter examines how genocide has been transformed into a narrative of victimhood exclusively reserved for the Jews and how the Holocaust, with the help of Zionist “archival violence”, has been legally weaponized. It sheds light on how the struggle to acknowledge the extermination of Gazans as “genocide” reflects disparities in the recognition of traumas. Drawing mainly on Derrida’s notion of “archive fever” as well as Butler’s work on “grievability”, I apply a qualitative and quantitative study to five UN reports and a number of media content to expose the Jewish victim narrative reactivation and highlight the disparity in covering the suffering of some victims while marginalizing others. I finally demonstrate the important role played by individual journalism as a form of digital activism that has helped create a paradigm shift in the global awareness about the Gaza War by debunking the official discourse of Israel and its allies as well as their mainstream media outlets.

Keywords: digital activism, discourse, Gaza, genocide, holocaust, paradigm shift

1. The Gaza War: Conflicting Narratives of Victimhood

Since October 7 2023, when Hamas attacked Israeli military facilities and other sites, rekindling thus another war in Gaza, we have seen conflicting narratives of victimhood. The one that has been shaken mostly is that told by mainstream media in which Hamas is added to the list of evil nemeses stereotyped as threats to the White world, joining cold-blooded Russians, long-bearded Muslims, gun-loaded African-Americans, and greedy Asians. The officialese they used is familiar and has successfully manipulated the world’s public opinion into embracing othering narratives.⁴¹ Yet, the October 7 Gaza War has sparked a paradigm shift, as if some invisible hand has reset the world’s moral clock; more people are now aware of the party to be condemned for the bloodshed and destruction. Butler puts it brilliantly in “The Compass of Mourning” (2023) when she speaks about the dilemma one faces when asked about what Hamas did on October 7. Her being a Jew further complicates her stance as she is expected to denounce the attacks without contextualizing them within a larger historical frame where Israel is *the* colonizer. She asks, “Do we not need a critical and informed assessment of the situation to accompany moral and political condemnation, without fearing that to become knowledgeable will turn us ... into moral failures complicitous in hideous crimes?” (Butler,

⁴¹ Staszak, undoubtedly influenced by Edward Said, argues that othering is the process of defining a group by contrast with a dominant “Self,” assigning it negative traits, and thereby justifying its marginalization and exclusion (Staszak, 2009).

2023, para. 2). A similar unease is expressed in the aftermath of 9/11 by Moraga in the introduction to *This Bridge Called my Back* (Moraga & Anzaldúa, 2002). Moraga speaks of how the awareness of America's minorities of the expected repercussions of the US belligerent global intervention leaves them hesitant to fully sympathize with the government's narrative of victimhood (p. xix). She argues for the necessity to contextualize the attack in order to understand the enthusiastic reactions of many brown-skinned peoples around the world, giving the example of how many Palestinians, upon seeing the World Trade Center falling, celebrated the attack on the USA. She thinks it should be read as a part of their happiness to see the world's strongest neocolonial power pay for its arrogance and "history of cultural and economic genocide" (p. xix). Similarly, most "brown-skinned peoples", to use Moraga's taxonomy, notably Arabs, celebrated the Hamas attack on the equally self-entitled, expansionist state of Israel (Arab Center for Research and Policy Studies, & Arab Center Washington DC, 2024).⁴²

People in the MENA, especially, see this event as poetic justice: Israel had to be punished for its colonization of Palestine, the extermination of its people, and the transgression of international law. However, differently from the 9/11 reactions, in the October 7 Gaza War there is more awareness as to the manipulatory processes exerted by the world powers, which can be considered the beginning of a huge change. Such awareness may be attributed to the recurring whistleblowers, especially since 2000, drawing the attention of Western citizenry to the questionable actions and intentions of their leaders. Over the last two decades, leaked files helped question the world leaders' real motives. Scandals like the 2004 Abu Ghraib prison torture file, the 2006 WikiLeaks, the 2013 Snowden Papers, the 2016 Panama Leaks, the 2019 Afghanistan Papers, the 2021 Pegasus Spyware scandal, and even the still hazy Covid-19 phase—healthcare practitioners are still calling Big Pharma out on the virus and its vaccines—shook people's faith in their governments. This may be why the October 2023 war helped the world's gaze finally see what has been called "a conflict" for what it really is. Hamas's attack was recontextualized, against all the odds, as being one facet of Palestinian resistance to colonization, ending thus a cycle of fabricated Pavlovian-like association of "genocide" with the Jewish Holocaust only.

Exposing the prevailing approaches to trauma studies, the legislations leveraging antisemitism, and the ensuing academic and media favoritism in relation to specific traumas, this study explores the weaponization of Jewish narratives, illustrating how trauma studies have been appropriated to silence other narratives voicing out equally atrocious experiences. The article critiques the evident favoritism in the UN and mainstream media outlets' initial reactions to and coverage of the October 7 Gaza War. This biased reporting reflects Derrida's concept of "archive fever" (1996), where specific narratives are prioritized while others are deliberately overlooked, as well as Butler's notion of "grievability" (2004, 2010) as some lives are proffered as more grievable than others. The study finally demonstrates the efficient role of independent journalism and online platforms that shifted the global gaze towards the so-far invisible Palestinian side. It shows that thanks to digital activism, the global public opinion is more aware of the former manipulatory discourses of demonization of Gazans and victimization of Israelis.

⁴² According to a poll conducted by the Arab Center for Research and Policy Studies and the Arab Center Washington DC in 2024 across 16 Arab countries shows that 92% of respondents stand in solidarity with the Palestinian people. Within this group, about two-thirds (69%) voiced support for both the Palestinians and Hamas, while nearly a quarter (23%) expressed solidarity with Palestinians but distanced themselves from Hamas. According to the poll, 67% of respondents regarded Hamas's October 7 attack as a legitimate act of resistance. See Arab Center for Research and Policy Studies & Arab Center Washington DC, 2024.

2. The Jewish Victimhood Discourse: Academic and Media Weaponization

What happened on October 7, 2023 may be considered a kindling of a paradigm shift, allowing for the twentieth-century's least visible Homo Sacer to be seen at last⁴³. Israel and its allies rallied a heavy arsenal of propaganda to impose the usual narrative of the Jewish victim fighting the evil perpetrator, the Arabo-Muslim, a narrative that has secured an easy state of impunity for Israel. After October 7, reports of beheaded children, raped women and many *stories* massively invaded the news. Despite such narratives, much of the world has come to see the so-called “conflict”—as mainstream media often label it—for what it truly is: a settler-colonial project in which Palestinians face systematic dispossession and even extermination at the hands of their colonizer, Israel (Hilal, 2012; Pappé, 2006; Said, 1979).

In the wake of the October 7 Gaza War and while carnages were watched on live TV, the UN Security Council, the UN, and the International Court of Justice officials were engaged in an arm-wrestling game with Israel's allies. They held on to the Jewish victim narrative that, for decades, has been weaponized in defense of Israel, until it was no longer possible to turn a blind eye to the change taking place within the global public consciousness. The people demonstrating against Israel's international law breaches were not Arabs and Muslims only; Europeans, Americans and Asians shouted high and loud for the end of genocide and occupation altogether. The consciousness wave massively reached Ivy League universities as well as these countries' academic elite, marking an unprecedented development. This surge of global attention to the plight of Palestinians also invites for reflection on how historical atrocities—particularly the Holocaust—have shaped both scholarly discourse and international legal frameworks concerning mass violence.

It is important to note that the Jewish Holocaust is closely linked to the emergence of Trauma Theory in the 1990s. It left an indelible mark, consequently becoming a foundational event in trauma studies. It turned into the major topic of the discipline's research tendencies and a priority for grant-funding in major institutions. The term “genocide” itself was coined by Polish Jewish lawyer Raphael Lemkin, in reference to the Nazi massacre of the Jews in 1943, though his prior work on the Ottoman Empire's massacre of Armenians during World War I had started in the 1930s (United States Holocaust Memorial Museum, 2023). Despite Lemkin's work on the extermination of entire ethnic groups, “a legal definition of genocide was not incorporated into international law until 1948” when the Convention on the Prevention and Punishment of the Crime of Genocide was drafted (Feierstein, 2014, pp.11-12).

Early trauma studies have given access to the experiences of Shoah survivors, publicizing their testimonies. Scholars, psychiatrists, and sociologists especially highlighted the enduring intergenerational scars left by the genocide, not only on individuals but also on collective identities, which further cemented the Holocaust as the discipline's central focus. Over time, the association between Trauma Theory and Holocaust studies became so strong that the two are often perceived as inseparable. Trauma theory, as it has been shaped in the academy, often begins and ends with the Holocaust. Influential thinkers such as Cathy Caruth (1996), Shoshana Felman, and Dori Laub (1992) have given us powerful frameworks for understanding trauma, but they have also set the Holocaust as the dominant lens through

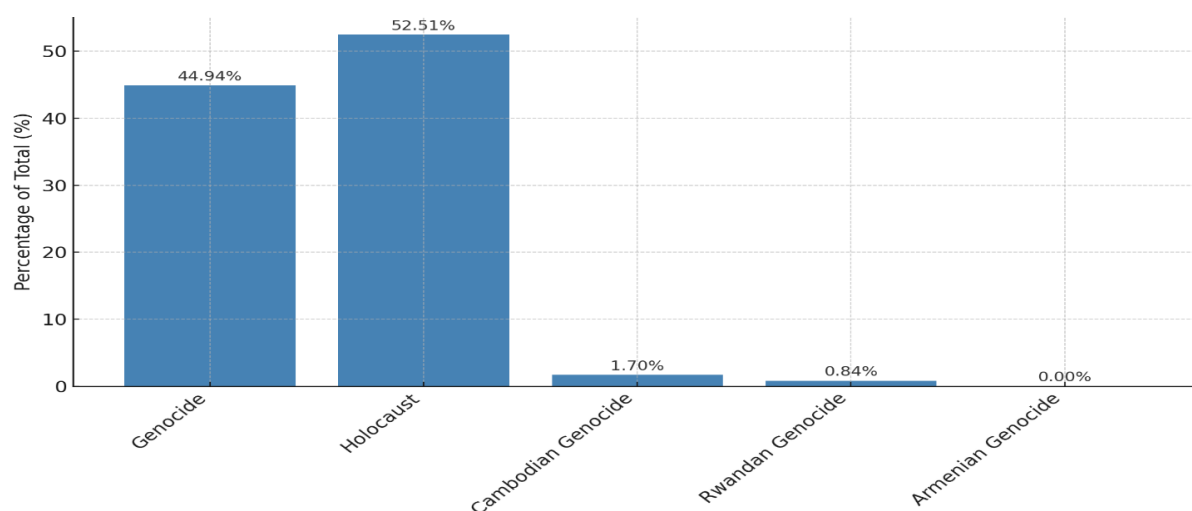
⁴³ See Agamben's *Homo Sacer: Sovereign Power and Bare Life*. According to Agamben (1998), when individuals are reduced to dispensable beings that can be killed without being sacrificed (p.71), the state holds them in a liminal state at once outside and inside the law premises, reducing them thus to the state of Homo Sacer (p.83).

which other histories of suffering are measured—or too often dismissed. This has created a hierarchy of traumas, one where Jewish suffering becomes the standard of recognition while the devastation of others is marginalized. By interrogating this hierarchy of traumas, it becomes possible to ask why Palestinian suffering, particularly during the recent war on Gaza, has struggled to enter the same frame of recognition.

The Jewish Holocaust has been treated as the century's worst genocide. Although the coverage during World War II was limited due to censorship—though not scarce, for hundreds if not thousands of photos and videos are broadcasted today—the Nuremberg Trials after the war (1945–1946) exposed the Nazi atrocities. Thus, the suffering of the Jews gained global attention. Upon conducting a simple Google search (see Figure 1), one obtains 285, 000 000 results for “genocide” compared to 333, 000 000 for “holocaust”, which shows the extensive coverage of the latter compared to the more general connotation of the first. Yet, when entering the key phrase “Cambodian genocide” (1975-1979), 10, 800 000 results are obtained; when searching “Rwandan genocide” (1994), only 5, 330 000 results appear; and when typing “the Armenian genocide (1915-1916)”, a low figure of 23, 000 is obtained despite the fact that these genocides, among many others like the Bosnia and Herzegovina genocide (1992-1995), or the ongoing Darfur genocide (since 2004), make up the worst twentieth and twenty-first-century massacres (The Wiener Holocaust Library, n.d.).

Figure 1

Google Search Results for Genocide-related Terms



The discrepancy in the figures when we compare the Holocaust to other genocides is clear, but it makes more sense when we consider the amount of media coverage of the Shoah, the amounts of academic grants allotted by Ivy league universities to Jewish and Holocaust studies, and the budgets pumped into the building of memorials, museums, and galleries, as well as into the movie and documentary making efforts channeled into them. The post-war trials, especially the Nuremberg Trials and Adolf Eichmann's 1961 trial, drew significant global attention to the Holocaust (Arendt, 1963). From 1946 to 1960, not a single mention of any other genocide was made by world scholars (Van Samang, 2021). The Auschwitz Foundation International Quarterly online database mentions that of all its entries, only 0.34% “deal with cases of mass destruction or genocide other than the Holocaust” (Van

Samang, 2021). This makes the Holocaust the most widely documented genocide in modern history.

The academic funding of Holocaust and Jewish studies is huge. The Harvard Center for Jewish Studies, for instance, offers several fellowships and prizes for qualified undergraduate and graduate students. Columbia University, in turn, provides graduate fellowships through its Institute for Israel and Jewish Studies, such as the Bloom, Hoffman, and Fromer fellowships. The Fortunoff / Vienna Wiesenthal Institute Research Fellowship is granted by Yale University to scholars who conduct research on Holocaust studies at the Vienna Wiesenthal Institute, giving them access to the digital collection of the Fortunoff Video Archive for Holocaust Testimonies. The list is long and the amounts, if calculated, are colossal.

As for the reiteration of the Holocaust by other channels, it is evident that it has been depicted extensively, whether in movies, TV shows, or documentaries. The latter are indeed broadcasted and replayed especially around commemorative dates, like International Holocaust Remembrance Day on January 27th or the End of World War II. The ARTE network has a large collection of documentaries, like the *80e anniversaire de la libération d'Auschwitz: Mémoires et témoignages de la Shoah*.⁴⁴ Documentaries, like Claude Lanzmann's *Shoah* (1985), provide unfiltered testimonies by survivors and photos and videos from the war archives that present shocking insights into the Nazi extermination process. Even documentary series, like *Apocalypse: The World War II* (2009), whose general theme is the Second World War, include long episodes on the extermination of the European Jews. Their regular reruns ensure that these stories remain accessible to new generations. Besides, many movies that have brought the atrocities of the Holocaust to mass audiences, such as Steven Spielberg's *Schindler's List* (1993), Roman Polanski's *The Pianist* (2002), or Marvin J. Chomsky's miniseries *Holocaust: The Story of the Family Weiss* (1978), deploy artistic ingenuity to present the genocide. These works have helped create powerful emotional impacts on the audiences worldwide, which makes of them also educational tools that preserve Holocaust memory.

In *Archive Fever*, Derrida (1996) defines the "archive" as "the residence of ... the archons" whom he defines as "those who commanded," who "held and signified political power," who "are also accorded the hermeneutic right and competence," and who are capable of "*speaking the law*" (*emphasis in original*, p.2). Therefore, he who holds the archive keys has the power to interpret and command, which echoes, in turn, the Foucauldian equation of power/knowledge, according to which knowledge, or truth, always shapes and is shaped by power relations (Foucault, 1980). Foucault states, "In a society such as ours, but basically in any society, there are manifold relations of power" that "cannot themselves be established, consolidated nor implemented without the *production, accumulation, circulation and functioning* of a discourse" (p.93). He remarks that "[t]here can be no possible exercise of power without a certain economy of *discourses of truth* which operates through and on the basis of this association" (*emphasis added*, p.93). In the case of the post-war empowering of the Holocaust *narrative* as the most atrocious massacre of the century, academia and the media have been efficient vehicles disseminating a *discourse of truth* that

⁴⁴ ARTE broadcasts a whole collection on the Shoah and anti-Semitism. See <https://www.arte.tv/fr/videos/120450-000-A/stolpersteine-des-pierres-contre-l-oubli/>

has institutionalized the Jewish victim narrative,⁴⁵ a narrative that was *produced, accumulated, circulated, and made functional* for the enablement of a given group.

The mass media have acted as archons, claiming the authority to interpret what happened to European Jews during World War II. Indoctrinating the masses about targeted topics can be deemed the mass media's favorite task, which elevates them to a "quasi-divine status" (Rhimi, 2016, p. 54). Millions of audiences are manipulated via the twin "global as well as local processes of selection (privileging) and deselection (rejection/dereliction)" (Rhimi, 2016, p.56). Therefore, what the media outlets deem worth covering survives—hence its almost 'divine' power.

The massive coverage of Shoah-related subjects propels Jewish victimhood, engendering what Volkan (1998) dubs "chosen trauma". Drawing on Sigmund Freud's group psychology theory, Volkan suggests a formulation called "large-group identity", according to which people who experience the same tormenting conditions start feeling a sense of belonging to each other (Volkan, 1998). Volkan also argues that this group selects a chosen trauma and "adds a past generation's mental representation of an event to its own identity," adding that "while groups may have experienced many traumas in their history, only certain ones remain alive" (Volkan, 1998, *Definition of chosen trauma* section, para.1). For him, not all traumas follow the same process; some people with this large-group identity cannot mourn the collectively-experienced loss and, via specific psychodynamics, pass it on to the next generations (para.1).

This choice, caused by the inability to mourn, causes the relaying of the memory unto the next generations (Volkan, 1998). Yet, the transmission of the chosen trauma brings new functions: it is "reactivated" and turns into a powerful psychological force (Volkan, 1998, *Definition of chosen trauma* section, para.3). Leaders intuitively seem to know how to reactivate a chosen trauma, especially when their large group is in conflict or has gone through a drastic change and needs to *reconfirm or enhance its identity*" (*emphasis added*, para.3). A willed *reactivation* of a chosen trauma for specific goals is consequently what happens during crises. This is the case of the Shoah trauma whose *reactivation* is deployed via academic and media channels. The latter engage in discussions and theorizations about the Holocaust, especially following events that bring to the fore ethnic conflicts, such as individual or organized acts of violence against one or more Jews—always interpreted as antisemitic—or larger crises, such as what the media usually call "the Israeli-Palestinian conflict". In either case, calls from the world leaders to deal with the "crisis" *reasonably*, i.e., with lucidly-designed jurisdiction, are frequent.

3. The Jewish Victimhood Discourse: Judicial Weaponization

Landmark trials, such as the Nuremberg Trials, were pivotal in drawing the world's attention to the Holocaust's atrocity, though the main purpose was for the Allies, as British historian Taylor (1961) states, "'To give meaning to the war against Germany. To validate the casualties we have suffered'" (p. 93). These trials—from November 20, 1945 to October 1, 1946—established a legal framework that aimed to punish perpetrators, contrarily to the UK and France's thwarted endeavors to punish Wilhelm II after World War I (Sellars, 2023, p. ix). They institutionalized the Jewish trauma as a key narrative. By documenting the atrocities, the judiciary created a space where justice was presented as an efficient healing

⁴⁵ In "Chosen Trauma and Terrorism: The Jewish Victim Narrative" (2023) critic Aqdas uses the expression "Jewish victim narrative" to explain how the Holocaust has helped the Jewish communities around the world create a narrative of victimization.

mechanism. Nazi perpetrators were brought to the International Military Tribunal with strong evidence of war crimes. Thus, the monopoly of law in Nuremberg helped redefine justice as a societal acknowledgment of suffering. This new approach was the first step in the institutionalization of the Holocaust as a central narrative of historical trauma, influencing at once international legal standards and collective memory.

The second legal step reinforcing this narrative was the enactment of the memory laws. France's legislative, influenced at the time by zealous Jewish politicians, like Serge Klarsfeld and Pierre Vidal-Naquet, *spoke the law* that *reactivated* a chosen trauma. The 1990 Gayssot Act was passed to mute revisionist voices that contended the Nuremberg trials' figures of the Auschwitz massacre. Influenced by prior revisionist studies—of Maurice Bardèche and Paul Rassinier—Robert Faurisson sent three letters—one in 1974 to Israel's Holocaust memorial museum and two in 1978-1979 to *Le Monde*—claiming there was no genocide of Jews *per se*, according to sources other than the Nuremberg court (Bhagwathi, 1996). Faurisson was prosecuted for Holocaust denial in 1981 (Bhagwathi, 1996).

With the strengthening of the French Jewry (Weinberg, 1990), calls against revisionism were echoed in the French parliament halls, and following events that were deemed antisemitic—like the Carpentras cemetery desecration in May 1990 (Kramer, 2000)—the Gayssot Act was eventually signed, initiating a series of legislations known as “lois mémorielles” , “criminalising expressions which deny, grossly minimise, approve or justify acts constituting genocide or crimes against humanity, as defined by international law” (Council of Europe, 2018, p. 1). The French archons have spoken the law, reinforcing thus the Jewish victimhood narrative. The Jews are to be seen as always already subjected to hate and violence, which requires explicit legal protection.

Such laws have indeed elevated the historical and social understanding of Jewish victimhood into a codified legal reality that was amplified by those media that are almost exclusively controlled by Jewish or Zionist parties. Emory University historian Koposov (2018) states that the media helped “naturalize” the use of the expression, making it a “more commonplace” and “neutral marker” (p. 1). The absence of legislation criminalizing the denial of other war crimes, like those committed in Algeria, highlights inconsistencies in France's moral stance, suggesting “an implicit favoritism, a prioritization, [and] an exclusivity surrounding these laws” (Wartanian, 2009, *The Consistency of Memory Laws* section, para. 2). The judiciary's message was that revisionism was to be perceived as a harsh attack on Jewish identity and history rather than a mere academic opinion based on a particular school of thought that reads and revises history from a different stance.

4. The UN and Mainstream Media: PHEME's Tongue Un/leashed

In classical mythology, PHEME (Greek), or FAMA (Roman), is known as “she who initiates and furthers communication ... A tremendous gossip, [who] was said to have pried into the affairs of mortals and gods, then repeated what she learned, starting off at first with just a dull whisper, but repeating it louder each time, until everyone knew” (Museum-digital, n.d.), *PHEME* section, para. 1). She is also referred to in Homer's epic as “Ossa”, meaning rumor, and is described as “speeding hotfoot through the city, crying the news of ... hideous death and doom” (Theoi Greek Mythology, 2000, *Ossa Personification of Rumor* section, para. 3). PHEME may remind us not only of the mainstream media's role in the October 7 Gaza War, but also of the United Nations with its role limited more frequently to being the herald of bad news. The UN has no real power over what the “mortals” and “gods” do, and it merely sends its officials “speeding hotfoot” to announce, or denounce. At times, some of its

officials' statements on this Gaza War could even be read as part of the *reactivation* of the Jewish victim narrative.

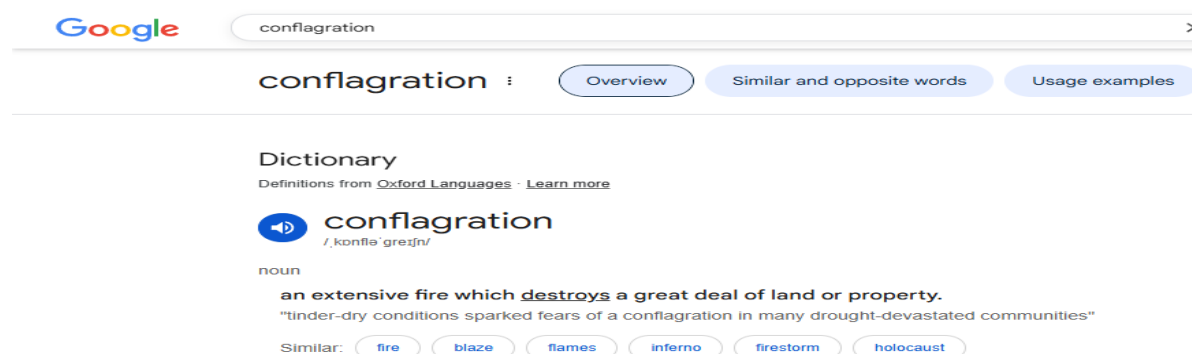
The UN's statements and press releases following the October 7 Hamas attacks and in light of the genocidal response of Israel unveil how the world powers had been successful in creating a strong archival economy whereby one chosen trauma is preserved. The archons seem to have done a good job as *exergues*: their selection of citations to be stored in the world's archive dictates today's Gewalt and the supremacy of its nomos (Derrida, 1996, pp. 7-8).⁴⁶ On October 7, 2023, the UN released a statement of seven sentences in which Stéphane Dujarric, the UN Secretary-General spokesperson, emphasizes condemnation and calls for restraint. The statement starts by condemning "in the strongest terms ... the *attack* by Hamas *against* Israeli towns" (*emphasis added*, United Nations, 2023, October 7). "Attack" is not usually common when referring to military actions; "offensive" is. It is more common to say "X launched an offensive against Y." Though syntactically similar, the prepositions "on" and "against" are used differently. It is more collocative to use "against"—that carries better the meaning of hostility—with "offensive". The statement seems to highlight the violence of Hamas by making it *seem* directed "against" the Israeli civilians instead of a violent attack *on* Israel's state power. The initial sentences unmistakably condemn the attack by Hamas, framing it as an indiscriminate act of aggression against civilians. It provides a vague but large number of missiles that targeted civilians: "thousands of rockets toward Israeli population centers" (United Nations, 2023, October 7, para. 1). Within the space of seven-and-a-half lines, the words "civilian", or "civilians", is used four times along with other variations including "population", "abducted persons", and "victims", while also juxtaposing the words "family", "home," and "Israeli" to references to abduction and injuries caused by Hamas.

The UN statement ends with the Dujarric's urgent call to "all diplomatic efforts to avoid a wider conflagration," adding that "violence cannot provide a solution to the conflict, and that only through negotiation leading to a two-state solution can peace be achieved" (United Nations, 2023, October 7, para. 1). Dujarric's use of "conflagration" is curious, for it is not a commonly used term. The following figure (see Figure 2) shows the top research result provided by Google for the term "conflagration" (Google, 2025). One may think about the reason for suggesting "holocaust" in a definition of the word "conflagration". In light of the figures provided earlier (see Figure 1), it is clear that the word "holocaust" is massively provided for the public eye to see. In a Pavlovian fashion, we seem to be *redirected* by unseen algorithms towards massive familiarization with a chosen trauma, the Jewish Holocaust. "Fire", and its lexical field, has become a part of a bigger, plastic sign: "holocaust", a term now denoting the Jewish victimhood exclusively.

⁴⁶ In *Archive Fever: A Freudian Impression* (1996), Derrida explains that in the house of the archive, the nomos (laws) are imposed by the choice of archons, now turned "exergues", to cite at first; such citations imply supremacy of the cited. What is cited is therefore not questioned, which furthers the violence of power, "Gewalt", and secures an archival economy that is obliged without being questioned (pp. 7-8).

Figure 2

Google Search Results for “Conflagration,” Showing Suggested Related Terms



Note. Screenshot retrieved August 28, 2025, from <https://www.google.com>

It is important to note that at the final end of the stick to which these algorithmic threads are attached lie the hands of many of Israel’s armament arsenal investors. Companies that also own Google shares, namely BlackRock, Fidelity Management, and Vanguard Group, have been pumping huge amounts of money to arm Israel. In June 2024, the UN addressed them and other companies to stop their actions stating that if they fail “to prevent or mitigate their business relationships with” Israel, they will be held complicit “in *potential atrocity crimes*” (*emphasis added*, Office of the High Commissioner for Human Rights, 2024a, para. 5). Yet, one year after this warning, Google was still involved with Israel’s *hasbara*. It is reported to have signed a \$45 million contract with Netanyahu’s office to downplay famine in Gaza via digital ad campaigns for six months, while hundreds of Palestinians were killed at aid sites (The New Arab, 2025). It is also important to remark that this comes after Israel had implemented a complete blockade of food, medicine, fuel, and humanitarian aid on Gaza since March 2, 2025. On another note, what is noticeable in the OHCHR’s statement, released one year after the beginning of the Gaza War, is that it still calls the mass massacre of Palestinians “potential atrocity crimes” (Office of the High Commissioner for Human Rights, 2024a, para. 5). However, according to a CNN article published in August 2024, i.e. merely two months after the OHCHR’s statement, “[m]ore than 40,000 Palestinians have been killed in Gaza since Israel launched its war on Hamas following the group’s October 7 attack” (Picheta, 2024, para. 1).

The UN Special Coordinator for the Middle East Peace Process reminds us in another UN declaration that “violence begets violence,” faithfully echoing a statement released by the UN Office for the Coordination of Humanitarian Affairs on the same day (Office of the High Commissioner for Human Rights, 2024b, para. 6). The declaration does little to hide his bias. Tor Winnesland highlights Israel’s perspective, using strong emotive language, describing the attack as “abhorrent” (Office of the High Commissioner for Human Rights, 2024b, para. 1-3) and highlighting the “deep scars” left on Israeli individuals, families, and the “collective memory of the State of Israel and the world” (para. 1). Words like “brutality,” “cold blood” (para. 2), and “unimaginable conditions” (para. 3) are used to convey the UNSCO’s condemnation of Hamas and a strong alignment with Israeli suffering. The declaration clearly deprioritizes the Palestinian standpoint and when the suffering of Palestinians is mentioned later in the penultimate paragraph, Winnesland says that the war “continues to shatter lives,” without much precision (para. 6). His brief account of the devastation on the Palestinian side is less detailed and less emotionally evocative than the description of Israeli suffering. No specific

details about Palestinian casualties, displacement, or humanitarian suffering are provided, despite the undeniably high Palestinian death toll.

Wennesland explicitly mourns “over 1,200 people” killed, emphasizing that Israeli “hostages”⁴⁷—mentioned four times—are being held in Gaza (Office of the High Commissioner for Human Rights, 2024b, para. 2-3). He fails to refer to the thousands of Palestinians held by Israel for long decades without trials. He appeals to international humanitarian law to immediately and unconditionally release Israeli captives (para. 5) but does not state that, in November 2023, while hostages were being released by both Hamas and Israel, simultaneous arrests and military operations were conducted by Israel in the West Bank (Al Jazeera, 2023b; Associated Press [AP], 2023). Wennesland states: “To the people of Israel, ... your pain and loss are felt across the world, and I stand together with you in grief during these difficult times” (Office of the High Commissioner for Human Rights, 2024b, para. 4), a statement that entirely overlooks the Palestinian victims.

Commenting on Herbert Marcuse’s discussion of contemporary media indoctrination, Rhimi (2016) asks whether this is “a new tendency towards a more rationalised hegemony mediated by the [mainstream media] over both the critical and uncritical minds” (p. 60). He gauges whether this is a “new form whereby the postmodern individual may be indoctrinated to react more passively as to, for example, terror states like Israel ... while being agreeable to the victimisation of the powerful aggressor and the incrimination of the weak victim” (Rhimi, 2016, p. 60). Observing how some of the UN officials and bodies have been tackling the Gaza War, one can but see how much they resemble PHEME, whom Virgil describes as “making the small seem great and the great seem greater” (Virgil, 2006, p. 180). One wonders if there is any more possible distortion of facts to further attempt a brainwash on the masses, putting forth the Israeli narrative while silencing the real victims who have had to suffer colonization, displacement, and genocide for over seven decades now.

One year after the escalation of the decades-old massacre, various UN bodies seem to orchestrate a narrative that completely marginalizes the Palestinian cause. They are still incapable of reneging their officialese. UN official Pramila Patten, Special Representative of the Secretary-General on Sexual Violence in Conflict, speaks about “‘clear and convincing information’ of rape and sexualized torture being committed against hostages seized during the 7 October terror attacks” in her March 4, 2024 report (United Nations, 2024b, para. 1). Such allegations proved to be fabricated. Many news outlets retracted such initial claims after failing to find corroborating evidence.⁴⁸ The accuracy of these reports was refuted, yet none publicized the fabrication as much as they did the wrong reports. However, in November 2023—nearly six months before the release of the Patten UN report—the world watched live TV footage of smiling, healthy hostages waving at their Hamas abductors from inside a Red Cross vehicle (ABC News, 2023), an act that triggered Israeli officials’ wrath back then. The same scene did not change with the latest release of hostages on January 25, 2025. “Three smiling, apparently

⁴⁷ Some studies have raised the issue of Israel’s deliberate semantic framing through the use of “hostage” to refer to Israeli captives and “prisoners” to Palestinian ones, calling this an intentional narrative choice (Factchecking.ie, 2025).

⁴⁸ See *Le Monde*, April 3, 2024 where Maad, Assma, et al. explain the extent to which this rumor has gone to the point of being repeated by White House officials. https://www.lemonde.fr/en/les-decodeurs/article/2024/04/03/40-beheaded-babies-the-itinerary-of-a-rumor-at-the-heart-of-the-information-battle-between-israel-and-hamas_6667274_8.html.

healthy civilian women came home to a country overjoyed at their return,” says *The Guardian*’s reporter from Jerusalem (McKernan, 2025, para. .(11

5. War Victims on Unequal Scales: Framing Victimhood during the War on Gaza

The coverage of the conflict in Gaza has shown wide variation, with media focusing on specific categories of victims for political ends. For example, the US media supportive of the Israeli side usually emphasize emotive aspects of what they cover. Most of the content they publish revolves around women and children’s illustrations. This is equally observed after October 7 as Israeli media immediately folded into the national narrative of victimhood. As a strategic assessment from the Institute for National Security Studies (2024) notes, editors and reporters alike recruited themselves into the war effort, trading the norms of critical journalism for patriotic solidarity. This shift was visible in the stories that received the most attention: the images of young female soldiers taken captive by Hamas, the televised funerals where widows and fiancés clung to coffins, wailing in grief. These moments were elevated into symbols of collective loss, weaving a discourse that centered Jewish pain while eclipsing other narratives.

Such focalization on pain and loss helps strengthen the already existing discourse of Jewish victimhood. It serves a specific political and military objective and legitimizes the Israeli military offensive against Gaza and other parts of occupied Palestine and even neighboring countries, like Lebanon and, more recently, Syria. It is important to remind here that this falls within the premises of Israel’s promised and announced plan of the Greater Israel. Waring (2024) states that “the Ben Gurion Canal project and the annexation of Gaza for Israel’s economic growth are consistent with the Greater Israel concept ... acknowledged [in the diaries of the] founder of Zionism in the 19th century, Theodor Herzl” (Waring, 2024, *The “whole land” justification and its scope* section, para. 1-2). He adds that “Eretz Yisrael”, i.e. “Greater Israel” is not limited to “the traditional Jewish areas within Palestine [only] but also [annexes] the Sinai, Egyptian Palestine, and Cyprus, with the totality stretching from “the brook of Egypt to the Euphrates” (Waring, 2024, *The “whole land” justification and its scope* section, para. 1-2). Israel, therefore, has greater and much deeper-seated intentions about the future of its territories, or rather the territories it could secure by force with the help of its Zionist allies in the East and West.

Showing images of widowed women whose husbands died while fighting Hamas combatants kindles nationalist sentiment. When critics of the government raise their voices against Netanyahu’s decision to continue a war that Israel was clearly losing, at least militarily, the media can amplify images of grieving soldiers’ widows and mothers—crying, wailing, and lamenting their loss—to stir nationalist sentiment and shape public perception. This further legitimizes the chosen discourse about the obligation Israel now has: avenging its lost sons, butchered by a monstrous enemy lurking in the dark and attacking them while they were on a sacred mission. Pictures serve to nurture this narrative for purely expansionist reasons, but they also help Netanyahu dodge the eminent threats from within Israel to be held accountable for corruption in what came to be dubbed “The Bibi Files”.⁴⁹ The longer he stays at the head of the government, the less likely it is that his case will be dealt with during his own administration.

However, similar emotive media appeals can also be observed in Arab-Muslim media. Indeed, the tragic repercussions of the Israeli militarist offensive on women and children make

⁴⁹ For more on this case, see Freilich. C. “The Case Against Benjamin Netanyahu.” *Foreign Policy*, Jan. 8, 2025. Accessed Jan. 31, 2025. <https://foreignpolicy.com/2025/01/08/case-against-netanyahu-bibi-files-documentary/>.

up the main headlines of the media coverage. Some media outlets that support the Gazan cause present the war as a humanitarian disaster, using highly emotive narrative accounts of suffering while focalizing heartrending images of women and children. This is done to stir the sympathy of the world's audiences, especially those outside the MENA region, in countries where the Zionist media had been successful in convincing their audiences of the Jewish victimhood, forgetting to highlight that the Jew is in reality a colonizer who seems unable to control his/her aggressive expansionist drives. The media siding with the Palestinian perspective focuses primarily on children and their deaths which are mostly included in reports accompanied by bloody visuals. We have all seen images of dead or injured children, children who are maimed, headless children, alongside images of their grieving mothers. Consequently, the representation of the Israeli aggression is shifted towards the most innocent category of Palestinians; we are given evidence that all Israeli operations of "self-defense", "self-preservation", and Hamas-hunting result in harming the least involved individuals in armed resistance—children and women.

Al Jazeera English, affiliated to one of the most popular and affluent news networks in the MENA region, has a considerable number of videos, long and short ones, covering Gaza-war-related content. It focuses its lens on stories of Palestinians but mostly on Palestinian women and children. A quick search—I typed "Gaza" on the channel's main page—conducted on January 31, 2025,⁵⁰ almost a week after the beginning of ceasefire and hostages exchange between Israel and Hamas, shows that among the first 30 video titles, 2 references are made to children and 1 reference mentions "Hala and her cat." Though the number of references to children and women is low—probably because that week's highlight in all the world news was the release of hostages following the ceasefire and the return home of thousands of Gazans—the pictures of women and children appear in 7 video thumbnails, including 1 showing closely a very young child with maimed legs.

I applied a similar research strategy to be able to compare the frequency occurrence of words referring to women and children and those referring to men. This was done on the same day of my previous research. Upon typing the phrase "Gaza women children", I obtained 26 direct references using the terms "women", "woman", "boy", or "girl" in the 30 videos' titles examined, including 9 times where the two words "women" and "children" are juxtaposed. The expression "women and children" occurs 6 times, while in the three remaining instances, the two words are either separated by a comma or a number.⁵¹ However, when I entered the phrase "Gaza men", I only counted 15 references to "men" in the first 30 videos' titles, nearly half of the number of occurrences of "women and children", juxtaposed or separated.⁵² References to children ("boy", "girl", "child") and women ("mother"), however, occur 7 times. Besides, although the search is about "men," six of the first video-preview images draw attention to children. The first two thumbnails feature a little girl crying, her face reproduced twice on the poster frame, while another shows two boys in tears, one clutching his father's boots, as the caption highlights their grief—images clearly designed to tug at viewers' emotions.

Among the first 30 video titles, only one reference is made to the elderly with the word "grandfather". Yet this grandfather happens to be one of the most memorable faces of the war on Gaza, the old man with a grey beard and a turban, a man whose expression of grief on the death of his granddaughter, Reem, became one of the most moving moments of the war. His expression "soul of my soul" has become so popular that it imposed itself as a neologism in

⁵⁰ See Al Jazeera English. (n.d.). Al Jazeera English [YouTube channel]. YouTube. <https://www.youtube.com/@aljazeeraenglish>

⁵¹ <https://www.youtube.com/@aljazeeraenglish/search?query=Gaza%20women%20children>

⁵² <https://www.youtube.com/@aljazeeraenglish/search?query=Gaza%20men>

English; “soul of my soul” translates an Arabic expression that has an equivalent in English, the idiom “the apple of one’s eye,” which did not seem to translate the man’s loss and grief well enough. The literal translation was preserved and spread faster than any other expression heard during the war. As for the disabled, these are not referred to in words, and the video thumbnails fail to translate their presence except in photos of maimed children. After comparing the figures, it becomes clear that most titles of the videos produced by Al Jazeera English and posted on its website focus on women and children more than on men and the elderly by relying on direct and repeated word references to them, and on the choice of their photos as preview images for the mentioned videos.

One could spend a considerable amount of time counting and comparing the references to women and children, not only in videos covering the war on Gaza, but also in other types of media, including social media. Suffice it to conduct a similar search by entering the same expressions, “Gaza women children” and “Gaza men”, in the search browsers of the most popular online magazines and newspapers to find how clear this focus on the suffering of women and children is. Alternative media used by the masses today also feature stories of mothers who lost some or all of their children. The theme of the suffering mother is told in quite an emotive language through which the narrative of the war horrors puts forth the young age of the dead child, their physical features, and their old school or birthday photos. They even cite from the grieving mother’s wailing words. One of the most emotive stories we all remember is that of Yusuf, the doctor’s son whose “desperate Palestinian mother” kept searching for him in the corridors and rooms of Nasser Hospital, in the city of Khan Yunis, shouting: “Find him! He’s curly-haired, he’s white, and he’s beautiful,” before they found him dead (Times of Gaza, 2023). Other stories shared on social media foreground babies’ toys, teddy bears and dolls, stained with the victims’ blood, cribs under the rubble, and many more harrowing visuals. Such videos and photos became so popular that demonstrators took them as their manifestations’ themes, like the January 13, 2024 “March for Gaza.” Hundreds of demonstrators gathered in front of the White House and threw a large number of bloody dolls at the building (The Independent, 2024).

The coverage of stories of the war with much focalization on women and children certainly reflects the atrocious reality of the high death toll among this category, according to figures recorded and announced by most official sources, Palestinian and International ones alike. A BBC article states: “The UN’s Human Rights Office has condemned the high number of civilians killed in the war in Gaza, saying its analysis shows close to 70% of verified victims over a six-month period were women and children” (Moench, 2024). However, a recent UN statement, published on December 18, 2024, fails to provide exact figures for the deaths of women and children. Instead, it offers the broader number of “more than 45,000 Palestinians” killed and compares it to the “1,700 Israeli and *foreign nationals*” that “have been killed in *attacks in* or originated from Gaza” (*emphasis added*, United Nations, 2024a). Therefore, the number of 1,700 is not of Israelis alone; it involves foreign nationals. The UN prefers to say “attacks in ... Gaza” as it highlights the impersonality of the actant, for it avoids stating by whom the attack was made—we all watched on live TV when Israeli bombardments also targeted journalists, UNRWA and other NGO workers. Despite the high death toll of women and children—more likely highlighted also as they make up a category traditionally seen as more vulnerable than that of men—the percentage in effect translates into the demographic characteristics of a war zone. In a blockaded area, with little medical access and high rates of male absence from households—because of Israeli killings and abductions, or because of the choice of many men to join the resistance factions—it is expected that such discrepancies in the figures emerge when counting the killed populations.

6. Alternative Media as Seeds of a New Discourse: Archiving the Unarchived

The role played by individual journalism has helped create a shift in global awareness about the Gaza War. New forms of journalism, like vlogs, blogs, and social media posts, have turned into new media outlets trusted by the people who are no longer convinced by the official discourse of Israel and its allies, as well as their mainstream media outlets. This new type of journalism that provides a counter-discourse is referred to as digital activism. Social media platforms allow for real-time sharing of unfiltered content from conflict zones. Klüser (2023) comments on the unprecedented interest that Instagram, for example, took in the Gaza/Israel war ever since October 7, 2023 and on the more important number of posts on the war among these influencers, compared to other public figures, like politicians and traditional celebrities. Audiences have been given another version of what mainstream media outlets present. One pertinent example is Hind Rajab's story that could have been relayed differently had there been no recording of the intentional killing of the child. On February 9, 2024, the Palestinian Red Crescent Society (PRCS) released a recording of Hind Rajab's call for help, which was shared widely on social media. Audiences around the world heard as Israeli soldiers continued to shoot at her deliberately until she died (The Washington Post, 2024; Tortoise Media, 2024).

Individuals in war zones in Gaza and Rafah have shared live stories with on-the-ground perspectives, which had a huge impact on the global understanding of what has been dubbed as "conflict". Vlogger Motaz Azaiza, a twenty-four-year-old photographer and videographer who has over 17 million followers on Instagram, has posted content describing daily life in Gaza, showing the impact of airstrikes and highlighting the humanitarian crisis there. His approach rests on raw, unfiltered footage and emotional commentary. Another vlogger from Gaza, twenty-five-year-old Bisan Owda has provided her 1.9 million Instagram followers with vlogs about women's and children's lives in the war. Her poetic style and spontaneous relaying of people's experience at different hours of the day and in different settings help emphasize Palestinian resilience despite the harrowing reality her followers see. Another example of Palestinian vloggers who have helped unveil the reality of the conditions in the tents of the displaced masses of people in Rafah is Mohamed Al Khalidi. He has 2.1 million followers on Instagram and has published live reels from the tents. Among the reels that went viral are his "We live proudly in the tent" and "Tall guy problems in a tent" that film transitions of a typical day in the refugee tents, where movement is restricted because of the small space inside and outside the tents (Soudah, 2024, para. 2). Yet, the most famous reel was about his brother. Mohamed's brother and vlog partner Zein is first seen "walking and smiling" before Mohamed swipes at the camera to show us people "trying to get Zein's limp body to medical care" before we see "other scenes of devastation and watch him "mourning Zein's loss" (Soudah, 2024, para. 4). The video literally transitions from life to death.

Not only Palestinian vloggers have been influential in showing what Israel has tried to hide, especially at the beginning of the war; Western individual journalists have also had a tremendous role in shifting the focus from Israel and its Western allies' version of the war narrative towards the Palestinian one. Owen Jones is among the most important independent journalists. He has endeavored to present objective analyses of and commentaries on official statements by politicians. His YouTube channel counts 738 million subscribers who follow his regular videos and posts. His approach is straightforward and, especially, very well documented. The description of his channel says: "This is my independent channel, unaffiliated to any media organization, in which I try to challenge and expose injustices, give a platform to the unheard, and offer alternatives to a broken system (Jones, 2015).

Digital fact-checking has been very instrumental in debunking the Israeli war propaganda. Online communities, whether followers of pages and channels, or vloggers and digital creators, have been capable of verifying claims made by official sources and mainstream media outlets siding with Israel. They could debunk them rapidly and with evidence. Digital fact-checking has, for example, allowed the exposition of Israel's fabricated story of Al-Shifa Hospital tunnels serving as terrorist war ammunition storage sites and proved they were medical equipment storage facilities (Al Jazeera, 2023a; Reuters, 2023; Truthout, 2023). Online communities scrutinized timetables that Israel had labeled as evidence of terrorist planning, only to reveal that they were simply hospital staff schedules. This revelation sparked widespread skepticism and criticism of the Israeli military's claims (France 24, 2024). Another war propaganda was debunked when the claim of Israeli official—later on reiterated by US politicians—that Hamas beheaded children proved to be a hoax (Maad, Audureau, & Forey, 2024).

The internet has also helped leaked footage, showing IDF soldiers killing Palestinian civilians intentionally or raping and torturing war prisoners, circulate widely (Reuters, 2024b). While Israeli officials' initial claims were that these were fabricated stories, a UN investigation, published in March 2025, found that Israeli authorities did engage in sexualized torture of detainees, including men and boys, as part of systematic oppression in Gaza (Berger & Dadouch, 2023). Besides, online access to documentaries about previously decontextualized Palestinian deaths helped people see another hidden facet of the "conflict". The 2022 documentary *Tantura*, directed by Alon Schwarz, brought to light the harrowing events of the 1948 Nakba, focusing on the massacre in the Palestinian village of Tantura.⁵³ The film features testimonies from Israeli soldiers of the Alexandroni Brigade, some of whom were laughing as they openly admitted to committing atrocities, including the rape of a 16-year-old Palestinian girl (Mejaddam, 2022; Schwarz, 2022).

In *The Origins of Totalitarianism*, Arendt (1958) suggests that the ideal subject of totalitarian rule is the one who cannot distinguish fact from fiction. Following her logic, then, subjects can regain their free will if they regain the ability to distinguish truth from falsehood and get rid of ideology-imbued narratives, like the ones we have witnessed mainstream media outlets that side with Israel propagate. The growing gap we can now clearly see between mainstream media narratives and the public perception of the Gaza War demonstrates how efficient digital activism has been in creating a significant shift in how global audiences now perceive the "conflict", discuss it, and react to it. This change can be deemed a paradigm shift, for it matches perfectly Thomas Kuhn's outline of what makes a shift in a traditionally adopted paradigm. Kuhn (1970) defines a paradigm shift as a fundamental and revolutionary transformation in a community's understanding of an issue, which challenges existing frameworks and introduces radically new interpretations. This results in the previously accepted frameworks being questioned then replaced (Kuhn, 1970). During the October 7 Gaza War, long-standing narratives that cast the Israeli occupier as the primary victim were challenged, and the Allies' claims to being the world's protectors of human rights were questioned, particularly in light of their unequivocal political and military support for Israel. Previously silent or neutral audiences, especially in the West, became actively engaged—participating in massive marches for Gaza, staging protests against Israel's occupation, supporting solidarity initiatives such as the *Sumud* flotilla, and taking virtual actions such as sharing hashtags and raising funds. This shift in perception and action constitute, arguably, one of contemporary

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<https://theconversation.com/tantura-new-documentary-sparks-debate-about-israel-and-the-palestinian-nakba-189101>

history's paradigm shifts: an epistemological rupture that unsettles history's "stable structures," as Foucault (1972) describes.

7. Will the Winds of Change Yield Decolonization and Peace?

The Palestinian victims' death tolls, as they have been dealt with, reflect a bitter reality. The most prominent Western media outlets and many UN statements, especially at the beginning of the October 7 Gaza War, as demonstrated above, tend to focus on a specific group, while overlooking other groups that are equally vulnerable. All who are hungry, dehydrated, unarmed, and untrained remain vulnerable in a brutal war. Is the life of a civilian male, old or young, less worthy of being placed in the spotlight for the world to see, when all Gazan civilians, female and male, young and old alike, the living and the unborn, are deliberately targeted? Is the life of a brown-skinned human less worthy of recognition than that of a white person, less grievable, as Butler (2004) would argue? Butler (2010) remarks that some lives are more grievable than others indeed. She invokes the issue of the "selective framing of violence" which she thinks raises an "epistemological problem" as "the frames through which we apprehend or, indeed, fail to apprehend the lives of others as lost or injured (lose-able or injurable) are politically saturated. They are themselves operations of power" (Butler, 2010, p. 1). Such selective framing of violence also engenders ontological issues having to do with the meaning and future of lives as power mechanisms decide about how much worth a given life should be allotted, especially at war (Butler, 2010, pp. 1-2). According to Butler (2010), the stance taken towards a given life depends on whether it is "recognized" or merely "apprehended." She argues that a life can be apprehended without being truly recognized (p. 6). As she states, "Apprehension is understood as a mode of knowing that is not yet recognition, while recognition stems from setting a given normativity" (p. 6). In other words, a life is recognized—and therefore becomes grievable—only if the norm of personhood is acknowledged; when that norm is absent, the life remains unrecognized (pp. 5–6). This dynamic was evident in the early stages of the recent war on Gaza.

Not only were the lives of Palestinians insufficiently recognized by most Western media and UN statements—particularly at the beginning of the war—but they were effectively erased from the broader, more accessible frameworks of Western media and diplomacy. In those early stages, mainstream TV anchors repeatedly asked the same question: "Will you condemn Hamas?" without providing context on the broader issue of the Israeli colonization of Palestine or exposing Israel's dehumanization of Palestinians. One of the most chilling moments of the Gaza war occurred when Israel's Defense Minister, Yoav Gallant, declared: "We are fighting human animals and we must act accordingly" (Human Rights Watch, 2023). Deprived of their personhood, Gazans were apprehended as a nuisance, and political actions followed suit. A complete blockade on Gaza was decided and applied harshly, and, when the international community pushed for humanitarian aids to enter Gaza, Israel unleashed its most fanatic citizens to block the entry of aid convoys, looting, destroying, and burning the food and medicine boxes Gaza was in dire need of (Reuters, 2024a). The United States, on its part, continues sending heavy tons of bombs and military equipment to its ally and, when asked about Palestinian deaths, claims they are collateral damage. As of the time of writing, U.S. shipments of military aid are still ongoing.

However, audiences who follow independent journalism broadcast online in digital platforms have learned how to navigate news about events. With the help of fact-checking resources, they can distinguish, more often than not, facts from fabricated news, objective truths from war propaganda. Global audiences have been empowered by this shift; they can critically reassess dominant narratives and challenge the long-standing portrayal of Israelis as sole victims. As such, a new space is now open for Palestinian suffering to be recognized. Digital

activism, during the current October 7 Gaza War, has been playing a vital role in rethinking public discourse and divulging the asymmetries between the two warring parties' powers that traditional media have often overlooked or obscured. Therefore, it is advisable for scholars and media consumers alike to engage critically with digital content, and to remain attentive to the broader historical and political contexts that shape media narratives.

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Generative Artificial Intelligence (AI)

I have used Open AI's free Chat GPT to generate Figure 1 to transform the figures and percentages of my research into a graph for more visibility.

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Literary Studies

The American Short Story and its Poetics of Crisis: Linguistic Principles of Postmodern Literary Text Formation

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Abstract

The research examines the linguistic principles of postmodern literary text formation, analyzed through the lens of postmodern poetics, understood as the poetics of crisis and deconstruction. It has been proven that the rhizomatic principle of narration, along with ideological-ludic and cognitive-semiological text-forming principles, is a cornerstone of any postmodern literary text. The essence of the rhizomatic principle of narration is revealed through a dramatic narrative crisis caused by the narrators' multiperspectivity, the destabilization of meanings, the ambiguity of plot elements, and a postmodern sensibility. The ideological-ludic principle is revealed through various language games that operate within large textual segments and sentences, resulting in fragmentation, incompleteness, and total deconstruction of text coherence. The cognitive-semiological principle is defined through specific postmodern poetic devices, such as metabola, desire machine, doxa, episteme, simulacra, and pastiche. These serve as the foundations for a unique postmodern ironic writing style. Particular attention has been paid to the methodology for identifying the aforementioned principles, which has been developed and applied through integrated poetic analysis. The American short story as a literary genre is analysed from a historical perspective, enabling the identification of three developmental periods (premodern, postmodern, and metamodern), each characterised by distinctive postmodern poetic devices typical of the respective eras. The choice of material arises from the fragmented worldview of contemporary individuals within the discourse of crisis, which is best expressed through the experimental and spontaneous nature of short fiction. Its brevity and stylistic precision have solidified its prominent role in contemporary American literature.

Keywords: postmodern poetics, American short stories, rhizomatic, ideological, cognitive-semiological principles

1. Introduction

The crisis phenomenon, in its broad sense, typically involves disaster, characterised by fear, danger, destruction, collapse, shock, loss, and trauma. Throughout human history, the concept of crisis has profoundly influenced human consciousness, shaping philosophical questions, political debates, social research, and cultural works.

Many scholars have extensively studied the concept of crisis (Babelyuk, 2024; Diamond, 2005; Koliassa, 2024; Koliassa & Babelyuk, 2022). Notable among them are Rene Girard, who analyzed mimetic crisis and violence in his work *Violence and the Sacred*, and Jared Diamond, who examined ecological and societal collapses in his monograph *Collapse: How Societies Choose to Fail or Succeed*. Under collapse, the researcher understood “a drastic decrease in human population size and/or political/economic/social complexity, over a considerable area, for an extended period of time” (Diamond, 2005, p. 23). He then analyzes the causes of historical and prehistoric instances of societal collapse, focusing on significant environmental changes, climate change, hostile neighbors, and trade partners, as well as how societies respond to these new challenges.

In postmodern poetics, crisis primarily indicates various kinds of societal breakdowns, which manifest not only through ecological concerns but also as linguistic issues: a completely disintegrated traditional textual structure of grand narratives that reflects the chaos of modern life. This shift in perspective has a profound impact on new ways of literary expression, fostering a distinctive postmodern poetics that emphasises deconstruction, intertextuality, and the fluidity of meaning. As a result, the linguistic aspects of postmodern literary texts become key areas of investigation, revealing how authors use innovative strategies to depict various types of crises, whether political, social, existential, philosophical, or poetic.

This gave rise to *the poetics of crisis*, which can be understood as a dynamic interplay between language (loss of meaning, textual structure, unreliable narration) and the unstable realities it seeks to represent. Moreover, it involves a conscious deployment of linguistic techniques aimed at destabilizing traditional narrative structures and linguistic norms, thereby echoing the very dislocation and upheaval faced by contemporary societies. Such postmodern techniques include fragmentation, paradox, metalinguistic commentary, and intertextual references (Babelyuk et al., 2021a; Babelyuk et al., 2021b; Koliassa, 2024), all of which serve to foreground the constructed nature of reality and open up multiple interpretive possibilities. Therefore, studying the poetics of crisis, particularly within discussions of postmodern literary criticism, necessitates a detailed examination of how language, form, and style converge to express a world characterized by uncertainty, fragmentation, and instability.

2. Research Aim, Materials, and Methods

This research aims to establish the linguistic principles of postmodern literary text formation in postmodern American short stories. Its main objectives are to explore the key features of postmodern literary texts, emphasizing their unique text-forming principles, to analyze contemporary American short stories that exemplify the poetics of crisis, and to demonstrate how their linguistic choices convey instability of meanings, upheaval, narrative uncertainty, textual fragmentation, and chaos.

The selection of case studies focuses on postmodern American short stories by J. Barth, R. Coover, D. Barthelme, J. DeLillo, B. Goff, R. Brautigan, and others that are experimental and spontaneous in style from a historical perspective. This approach allows for identifying three developmental periods (premodern, postmodern, and metamodern), as they illustrate the fragmented viewpoints of individuals facing different kinds of crises, as seen in Edgar Poe's story *S. Found in a Bottle*. It depicts a situation that has fascinated and even obsessed artists and writers since the late eighteenth century. The sudden crash of the unexpected sea upon the ship creates a moment of crisis, excitement, disaster, and danger, a flash point, one of those brief instants in time when the primal isolation and helplessness of the human condition are revealed. Furthermore, in this story, E. A. Poe (Poe, 1984) clarifies that a crisis situation creates

an entirely new imaginative universe for those who experience it. The old world of boredom and monotony that pushes Poe's narrator to board the merchant ship suddenly ends, as he finds himself in a new life, a new situation, and a new world.

The methodological background of the research is based on the principle of dialogicity, which underpins the study of language as a tool for storing experience, knowledge, and culture through the lens of discursive manifestations of postmodern text creation. It relies on core principles of semiotics (Barthes, 1974; Eco, 1989; Kristeva, 1980; Lacan, 2006), stylistics (Alter, 2005; Fokkema, 1986), narratology (Bacchilega, 2013; Barthes, 1974; Barthes, 1977; Füger, 2001; Herman, 2002), cognitive poetics (Stockwell, 2002; Tsur, 2003), as well as Eco's concepts of "open text" and the structural analysis of Barthes' narrative texts, along with the idea of possible worlds (Doležel, 1998; Maitre, 1983; Pavel, 1986).

These frameworks offer an essential understanding of postmodern literary texts as complex, relatively open, dynamic, and nonlinear systems that operate through interconnected elements and subsystems, driven by self-organizing mechanisms. They also examine the interaction between style-forming and meaning-forming principles in their creation, providing new perspectives on both classic and modern stylistic tools and techniques used in crafting postmodern American short stories.

The research methodology includes interpretive analysis, which helps determine the role of stylistic language means and devices in modern American short stories; the method of intertextual interpretation (Derrida, 1976) is used to identify intertextual features of various language games and intertexts through the free combination of many semantic relations, images, and semiotic codes from different sources languages, cultures; possible worlds modeling enabled to trace the interaction of different intratextual worlds within the diverse landscape of American short stories.

3. The Poetics of Crisis: Philosophical Foundations of Postmodern Discourse

The philosophical roots of postmodern writing stem from the epistemological foundations of European poststructuralism, which later evolved into American deconstructionism as a method for producing postmodern texts. To understand the poetics of crisis in postmodern discourse, it is essential to examine the historical context that gave rise to postmodern ideas.

Postmodernism emerged in the mid-20th century as a reaction to modernist ideas, which, despite their innovations, were often associated with ideals of progress, rationality, and universal truth. Many researchers (Connor, 2004; Eagleton, 1996; Hoffmann, 1986; Leitch, 2001; Lyotard, 1984; Rowan, 2002;) argued that the rise of postmodernism was caused by the shift from the structuralist scientific paradigm to the poststructuralist one. Postmodernism was based on critiques of structuralism, as all recent philosophical and scientific ideas claim to be post-structuralist. The emergence of poststructuralism was in the 1970s, and deconstructionism in the 1980s. Since the late 1980s, poststructuralism has been closely associated with postmodernism.

Of particular interest to humanities studies is the postmodernist theory, developed in the United States. It gained popularity there in the 1960s and 1970s and was manifested through deconstructionism, a specialised method for analysing postmodern literary texts, viewing them not as finished products but as processes of self-reproduction and creation, as "a cognitive universe" in Barthes, 1977, p. 2). Furthermore, postmodern thinkers questioned these ideals, highlighting the relativity of truth, the fluidity of meaning, and the fragmentation of identity.

Scholars studying postmodernism focus on its multifaceted nature. Lyotard was the first to describe “the postmodern condition,” (Lyotard, 1984, p. 56), the end of “grand narrative”, and the roots of this complex cultural phenomenon: Hassan in *Toward a Concept of Postmodernism*, defined its various aspects (psychological, philosophical, economic, political) and pointed out the key features of postmodern texts: Derrida’s deconstruction theory proved that the meaning of a literary work is unstable and can have multiple interpretations, making its significance equally central or more complex marginal (Hobson, 2012). He wrote: “a world of signs without fault, without truth, and without origin which is offered to an active interpretation” (Lawlor, 2019).

As a new philosophical perspective of a postmodern era, deconstruction generally seeks to demonstrate that any text is not a complete whole but contains multiple conflicting and irreconcilable meanings; that any text therefore offers more than one interpretation; that the text itself links these interpretations in an inseparable way; that the conflict between these interpretations cannot be resolved. As a result, an interpretive reading cannot proceed beyond a certain point (Currie, 2013). Derrida refers to this point as an “aporia” in the text; thus, deconstructive reading is termed “aporetic” (Currie, 2013).

Hence, deconstruction involves exploring the meaning of a text to uncover the supposed contradictions and internal oppositions on which it is built, aiming to demonstrate that those foundations are irreducibly complex, unstable, or impossible. It became a widely used approach in philosophy, sociology, and especially in literary criticism. Later, Hutcheon (2002), recognised for her work on historiography and postmodern narrative, made essential contributions to understanding the complexities of postmodern literary theory.

After World War II, disillusionment with “grand narratives” (Lyotard, 1984) was evident. The horrors of war, the Holocaust, and political upheavals made writers and artists question their ideas about progress and certainty. This atmosphere led to scepticism about grand narratives of enlightenment and inspired literary experiments that broke down traditional forms and images. Culturally, the increase in consumerism, technological progress, and media saturation led to a mediated reality marked by “simulacra and hyperreality”, described as “an era of total simulation” (Baudrillard, 1994, p. 23). This idea is thoroughly discussed by Baudrillard in his book *Simulacra and Simulation*.

Therefore, postmodernism as a broad intellectual movement fundamentally challenges ‘grand narratives’, fixed truths, and stable identities that characterised earlier eras. Instead, it celebrates multiplicity, ambiguity, and decentralisation of authority. These developments influenced writers to adopt self-referential, intertextual, and metafictional techniques, reflecting a world where distinctions between reality and representation blur. Unlike modernist authors, who often sought to find new forms of expression within a relatively cohesive narrative structure, postmodernists often fragment these structures to reflect the chaotic and disjointed nature of contemporary life.

The postmodern worldview influenced narrative techniques and poetic devices by dismantling traditional rules and patterns. A new, integrative approach to interpreting language elements has been developed by Dombrovan (2014), deliberately merging components from different language levels – phonetic, graphic, morphological, lexical, syntactic, and textual – each of which is constantly evolving. This approach includes methods like amplification, displacement, and generalization. Due to their variability, postmodern stylistic means and compositional devices generate narrative chaos within a postmodern literary text, leading to a never-ending series of language games. This, in turn, fosters a uniquely postmodern ironic style that reflects the poststructuralist view of the world as absurd and unpredictable.

Furthermore, this postmodern worldview includes multiple aesthetic perspectives, promotes openness to exploring meaning freely, supports intellectual experimentation, and encourages playful and ironic depictions of reality – all essential for creating a postmodern literary work. The novelty of postmodern writing lies in its projection of the postmodern worldview onto a classical writing style. Its heterogeneous, non-linear form is evident in its multimodality, intentional mimicry of modern “hyper-emotional” (sometimes schizophrenic) thinking through stream-of-consciousness techniques, multiple semiotic codes, and graphic elements that defy traditional text conventions.

Some of the main features of postmodern literary texts include: fragmentation, which involves breaking the text into disjointed segments to create a sense of dislocation; metafiction, referring to self-referential works that emphasize their own artificiality; intertextuality, the embedding of references to other texts to build a web of meanings; paradoxes and contradictions, using conflicting ideas to challenge single interpretations; and simulation and hyperreality, involving language elements that blur the line between reality and “an “era of total simulation” (Baudrillard, 1994, p. 23). Additionally, they serve not only as stylistic devices but also as philosophical statements about the instability of meaning and the fluidity of reality in the postmodern era.

4. The American Short Story Genre: from Brief Tales to Postmodern Literary Experiment

In contemporary literary criticism, a central concern is recognizing literary works that are notable for their originality within their genre. The predominant genre trend initiated by J.-F. Lyotard during the early postmodern era is the decline of the “great novel,” stemming from the “collapse of the metanarrative” (Lyotard, 1984, p. 34). This research focuses on American short stories, which are among such distinctive texts.

The short story theory started with E. A. Poe’s review of *Twice-Told Tales*, a collection of short stories by his contemporary, Hawthorne. He states that “a short story is a brief tale which can be told or read at one sitting.” (Poe, 1984, p. 3). This definition highlights two essential elements of the short story: (1) it should be short and (2) have enough coherence to keep the reader’s interest from start to end (Koliassa, 2019).

The length of a text, particularly the number of words, significantly impacts its genre diversity and the ambiguity of its meanings. However, among the main criteria for identifying the essential features of the American short story as a short text are stylistic and semantic brevity, fragmentation, a limited number of characters and events, created through exaggerated hyperbole (Lee, 2025), semantic and grammatical illogicality, multi-voiced narration by different types of narrators, which emphasizes the unnatural, abnormal, and fantastic qualities of the described situations (Hoffmann, 1986; Peden, 1975; Sim, 2001; Taylor, 1988). Therefore, considering the key features of this genre, American short stories are analyzed in the context of narrative rhizomaticity, multiple language games, and semantic ambiguity.

The American short story genre (Alter, 2005; Taylor, 1988; Warton, 1990) has remained popular throughout different periods of its development. It not only reflects the growth of American national literature but also mirrors social, cultural, and ideological trends shaping American identity. The emergence of specific postmodern poetic devices used in the American short story genre dates back to the eighteenth century. Their development is tied to the pre-postmodern, postmodern, and metamodern eras of the twentieth and twenty-first centuries.

The pre-postmodern period (1930s-1950s) in the American short story genre was characterised by the emergence of new narrative styles when monological dominance shifted toward a dialogical (intertextual) approach. Simple syntactic structures with minimal direct speech replicas prevail among stylistic devices, leading to the development of the “*telegraphic style*” (Rangno, 2003, p. 623) of writing. The technique of *grotesque hyperbole* was introduced, based on exaggerated, caricatured distortions of characters’ appearances, objects’ properties, and events, making the depicted images hyperfantastic.

The postmodern period (1960s-1980s) is characterised by the influence of mass culture on society: texts are consistently created using purely postmodern stylistic means, primarily through intertextuality. Due to the frequent incorporation of borrowings from films, songs, and oral traditions related to the past, intertexts have expanded beyond simple quotations or foreign language insertions. Instead, they are deliberately used as a stylistic device, often through reinterpretation of well-known themes and plots, and open borrowing. The introduction of intertexts into the main story contributed to the gradual development of postmodern sensibility (Lyotard, 1984), which reflected the chaos of life through the artificially organised chaos of fragmented narration. Gradually, the logic and linearity of the story were broken down, the narrative was deconstructed, and a new style of postmodern, *nonlinear writing* that ignores time and space was developed. During this period, the technique of *postmodern language games* appeared, involving language elements at all levels of communication. We, therefore, distinguish between graphic, phonetic, lexical, and syntactic language games, as well as games involving text fragments.

The metamodernist period (1990s – present) is characterized by the rise of a new kind of essayistic consciousness: the author stops being just a form of self-expression, and instead, the text or writing itself takes center stage, created by the reader “here and now” and based on rejecting traditional logical norms of expressing ideas and shaping a literary work. Among the identified compositional techniques, we observe the techniques of “television broadcasting” (Rangno, 2003, p. 623) and “montage thinking,” which imitate metamodern thinking and language, where different lexical elements are combined like a montage and create an incompatible, illogical set of words.

5. The Linguistic Principles of Postmodern Literary Text Formation in Contemporary American Short Stories

This chapter examines how modern American authors employ various text-forming principles to create experimental literary texts characterized by semantic chaos, structural fragmentation, and unreliable multi-perspective narration.

5.1 Exploring Rhizomatic Principle in Postmodern Narrative: Embracing a Nonlinear Approach

We understand the rhizomatic principle of text formation as a non-structural, nonlinear way of organizing a narrative with many “roots” (Deleuze & Guattari, 1987) and codes (artistic, philosophical, sociological, cultural) that intertwine to form a rhizome. Since a rhizome’s fundamental feature is to be heteronymous, meaning it grows in various directions, where each point can connect to any other simultaneously (Deleuze & Guattari, 1987), the traditional, semantically focused textual structure of a literary work is dismantled while maintaining the integrity of the postmodern literary text. Therefore, the core of the rhizomatic narrative principle is reflected in specific postmodern techniques such as dialogicity, ambivalence, and postmodern sensuality.

Traditionally, dialogicity is described as a feature of postmodern literary texts that highlights its focus on the addressee, emphasising the relational nature of all texts: dialogue can occur not only between participants but also among statements, texts, and cultural contexts themselves (Babelyuk, 2024, p. 18). In our study, we define dialogicity as a postmodern technique characterized by intentionally frequent direct appeals from the author to the reader, extensive authorial remarks on the main content of a literary work, prominent internal monologues employing stream-of-consciousness technique, and polyphony of unreliable narrators, whose speech turns into “*a cacophony of diverse voices*” (Babelyuk, 2024, p. 18). However, the ongoing development of a complex, nonlinear narrative leads to a situation where the narrator, rather than the author, and finally the reader, controls the unfolding of the story. This phenomenon is known as the “death of the author,” a postmodern literary theory introduced by Barthes (1977), who described the “absence of the author” as when “the author diminishing like a tiny figure at the far end of the literary stage is not only a historical fact or an act of writing: it utterly transforms the modern text” Barthes (1977, p. 3). In other words, a text’s meaning is shaped more by the reader’s interpretation than the author’s intent. Furthermore, the essence of the rhizomatic narration principle is demonstrated through a dramatic narrative crisis caused by the narrators’ multiple perspectives, the destabilization of textual meanings, the ambiguity of plot elements, and a postmodern sensibility.

The use of mixing different narrative forms, which leads to *the polyphony of narrators*, creates a situation where it becomes impossible to identify whose voice is heard in a particular part of the text. For example, the foundation of rhizomatic narration in B. Goff’s story *The Tao of Pooh* is based on blending the “I-narrative,” the objectified narrative, and the narrative of the characters, which later develops into a cacophony of voices from different unreliable narrators.

The story is narrated simultaneously by: (i) the author himself, the characters from A. A. Milne’s *Winnie the Pooh and All, All, All*, and (ii) the enigmatic narrators: *someone*, *some of us*, *he*, *we*, SCIENCE, and CURIOUS, who address the conventional author (Hoff, Hoff!), who appears to become a participant in the events, as in the textual fragment:

CURIOUS: “Why do birds fly south for the winter?”

SCIENCE: “Instinct.”

It means, “We don’t know.”

The important thing is, we don’t really need to know.

That was after some of us were discussing the Great Masters of Wisdom, and someone was saying how all of them came from the East, and I was saying that some of them didn’t, but he was going on and on, just like this sentence, not paying any attention, when I decided to read a quote of Wisdom from the West, to prove that there was more to the world than one half, and I read:

“Ouch!” said Pooh, landing on the floor.

“That’s what happens when you go to sleep on the edge of the writing table,” I said.

“You fall off.”

“Just as well,” said Pooh.

“Why is that?” I asked.

“I was having a terrible dream,” he said. (Hoff, 1982, p. 31)

The intricate interaction of multiple narratives weaves together to form a rich tapestry of meaning. Each narrator offers a distinct perspective that shapes the reader’s perception of the story, illustrating how reality can be understood in multiple ways. For example, the narrative from the character’s perspective shows a disrupted sentence structure, characterised by a montage of phrase fragments. Overall, the narrative becomes asyntactic with repetition, broken

or incomplete sentences, excessive punctuation, agrammatical constructions, and typographic font changes.

“Well, to begin with...” Pooh said.

Yes, well, to begin with, we have the principle of the Uncarved Block. After all, what is the most appealing thing about Pooh?

"Well, to begin with. . ."simplicity, the Simplicity of the Uncarved Block? And the nicest thing about that Simplicity is its useful wisdom, the what-is-there-to-eat variety – wisdom you can get at." (Hoff, 1982, p. 32)

Additionally, the polyphony of narrators in the story *The Tao of Pooh* is achieved through three narrative roles: the narrator, the listener, and the character. Each role has its own skill set that it develops during the storytelling process: the person who was a listener today might become a narrator or a character tomorrow. The constant change of narrators requires readers to make extra mental effort and demands continuous attention to the narrative sequence, making reading a challenging cognitive task.

Therefore, we can assume that many postmodern American short stories exhibit *the destabilisation of meaning*, as the nonlinear timeline and shifting viewpoints challenge readers to piece together the narrative. This fragmentation reflects a postmodern approach to storytelling, where traditional plot structures are deconstructed to foster ambiguity and fluidity in the story. Similarly, the physical layout of the text and the interplay of different unreliable narrators create a sense of disorientation. The footnotes, alternate narratives, and unconventional formatting of the text contribute to a layered storytelling experience that encourages readers to question the reliability of each narrator and the truth of the story. Additionally, some of them may become intertextual elements, establishing various connections to different texts.

Depending on its functions, intertext is seen as a means, method, and technique (Kristieva, 1980) of constructing a postmodern literary text from quotations and reminiscences, leading to a dialogue between texts and cultures. In this research, intertextuality includes borrowings, reworking of themes and plots, explicit or implicit quotations, allusions, parody, and the incorporation of foreign languages, all of which add to the work's stylistic diversity. The widespread use of intertexts in postmodern fiction means that the author becomes an active participant in the cultural dialogue. This results in the author constantly shifting from 'manager' to 'character,' which naturally creates fragmented narratives and a chorus of voices (as was demonstrated above).

The title of Hoff's story, *The Tao of Pooh*, has an underlying significance that depends on the reader's background. The word "Tao," borrowed from Chinese, translates to "way" and represents the universal link between the material and the ideal in their infinite diversity (Capra, 1999, p. 23). Thus, from a pluralistic postmodern perspective, a new approach to artistic perception emerges. Instead of seeking a definitive literary meaning, it emphasises experimenting with the text as a variety of options, akin to a "table with thousands of plates" (Deleuze & Guattari, 1987, p. 45).

Furthermore, the author of a postmodern text becomes a "compiler", who no longer produces truly original or meaningful content and instead relies on intertexts, borrowing elements from other works, such as A. A. Milne's *Winnie the Pooh and All All All*. Moreover, he explores themes and plots by illustrating Taoist principles through the characters' adventures, and conversely, by explaining the characters' motivations using Taoist ideas: "I considered writing a book that would clarify Taoist principles using Winnie-the-Pooh, and also

interpret Winnie-the-Pooh through Taoist concepts” (Hoff, 1982, p. 123), including translations from Chinese and Latin and quotes from Chinese sages. Such intertexts reproduce the cultural atmosphere of the Ancient East, creating a “life in quotations” (Kristeva, 1980, p. 45), which is a characteristic of postmodern fiction.

For example, in Goff’s story, *The Tao of Pooh*, the overly complicated norms, rules, and dogmas of Confucianism (a popular Chinese philosophical doctrine) are criticized for contrasting with the harmonious approach to natural existence advocated by Lao Tzu, the founder of Taoism. “To begin with, it is necessary to point out that in China, scholars were generally Confucianist in training and orientation” (Hoff, 1982, p. 123). Traditions and peculiarities of Eastern culture are presented here: “The *Wu Wei approach* to conflict-solving can be seen in the practice of the *Taoist martial art T'ai Chi Ch'uan*, the basic idea of which is to wear the opponent out either by sending his energy back at him” (Hoff, 1982, p. 124). The theory of Taoism is partially explained as well: “For a colourful contrast with the youth-destroying Bisy Backson Society, let’s get back to *Taoism* for a moment. The Taoist tradition is filled with fascinating stories (fiction) and accounts (fact, embellished or otherwise) of those who, while still young, discovered the Secrets of Life” (Hoff, 1982, p. 125).

The story also includes references to well-known historical facts and figures. *Han Hsiang-tse* (the founder and philosopher of Taoism, known for developing physical exercises to prevent disease, to whom this work is dedicated), K’ung Fu-tse, Buddha, Lao-tse, Chuang-tse, Li Po, Wu Tao-tse, Beethoven’s “Ode to Joy” (the choral finale to the Ninth Symphony), Japanese Emperor Hirohito, and Claude Debussy. Thus, supported by numerous intertexts, this postmodern text transcends linearity and encourages multiple reading interpretations (Kristeva, 1980), as well as cultural (Fokkema, 1986) and artistic pluralism, when a postmodern text can be equally inscribed in any cultural paradigm and not belong entirely to any of them.

Considering the diversity of quotations in the analyzed postmodern American short stories, we can argue that they are inherently both standalone works and intertexts, meaning an ongoing dialogue of texts, a “mosaic of quotations” (Kristeva, 1980, p. 13). This creates a postmodern rhizomatic heterogeneity of explicit and implicit quotations, each referencing different cultural meanings, thereby fostering a dialogue among cultures, particularly American, Chinese, and English, within a postmodern artistic text. Due to the nonlinearity of postmodern American short stories, the narrative can be “broken” (Kristeva, 1980, p. 12) at any moment, then either proceed in the same direction or shift to a new one. When this break occurs, then the “renovation” (Deleuze & Guattari, 1987, 34) emerges through various linguistic and stylistic means, restoring the lost meaning and producing a new version of the literary work. Therefore, the rhizomatic structure of postmodern American short stories is characterized by a series of unrelated, chaotic fragments, yet each one is connected to the previous ones. These connections are unstructured, multiple, and confusing, constantly breaking, which in turn leads to the ambivalence of textual elements in postmodern literary texts.

In postmodern poetics, *ambivalence* is understood as a postmodern technique inherent to postmodern texts, where the openness of the text encourages multiple interpretations (Waugh, 1984). It is “encoded” to accommodate different levels of reading, corresponding to “horizons of the reader’s expectation” (Iser, 1978, p. 3). In our study, ambivalence is examined from three viewpoints: (i) *grammatical*, which involves the concurrent use of language elements with all potential associative connections that stay intact despite the context; (ii) *compositional*, where realistic and fantastic events depicted in a literary work are seamlessly combined to create a single, meta-realistic universe; (iii) *narrative*, which depicts an inadequate, drugged consciousness of a new individual of a posthuman society to present the identity or non-identity

of the author, narrator, and character. For example, in R. Coover's short story *The Gingerbread House*, ambivalence is mainly shown through grammatical choices, as in the sentence "Shapes seem to twist and coil, and vapours seep up the forest floor" (Coover, 1987, p. 24). Here, the noun "vapours" has multiple meanings: "vapour," "mist," "chimaeras," "ghost," and "fancy images," and none are contradicted by the context. If the reader perceives the scene as real, then fog rises from the forest soil warmed by the evening sun. When considering other interpretations, the scene becomes grotesque and dreamlike: two children are compelled to wander in a shadowy realm within a strange, pseudo-reality that ironically reflects the fears and uncertainties of postmodern life.

Therefore, the technique of ambivalence plays a dual role in postmodern American short stories. It contributes to the "inherent uncertainty" (Hassan, 2001, p. 4) within the rhizomatic narrative structure, creating a chaotic and absurd storyline that reflects a fractured, alienated, and meaningless view of the world lacking regularity and order (Babalyuk et al., 2021). At the same time, this intentional use of ambivalence encourages a new genre of "reader's version of the story" (Barthelme, 2005), where the plot depends on the reader's different cognitive abilities. Moreover, the ambivalence found in postmodern literary texts contributes to the postmodern sensibility, which subsequently fosters chaos.

Postmodern sensibility stands out as a key feature of the modern worldview, encompassing both a philosophical perspective that views the world as chaotic and a poetic approach that explores a nonlinear postmodern writing style. The goal of depicting chaos in postmodern texts leads to complete semantic chaos (Kristeva, 1980), a key aspect of postmodern philosophy that emphasizes the meaninglessness of life. To evoke postmodern sensuality in postmodern American short stories, authors employ semantic asymmetry, characterized by unusual, asystemic connections between the expression and content of words, phrases, sentences, and larger textual fragments. This technique doesn't clarify the story's content but instead produces an unpredictable flow of semantics, evoking surprise and challenging expectations as in D. Barthelme's short story *Alice*, which begins with a lowercase letter and has no paragraph indentation or punctuation (aside from the initial imprint): "twirling around on my piano stool my head begins to swim my head begins to swim *twirling around* on my piano stool a dizzy spell eventuates *twirling around* on my piano stool I begin to feel dizzy" (Barthelme, 2005, p. 203).

The repeated circular motion on my piano stool makes my head spin. This fragment's syntactic structure visually echoes its meaning and adds to the narrative's overload of information. In the phrase "*chaos is tasty AND USEFUL TOO*," there's a semantic disconnect between the noun "chaos" and the adjectives "tasty AND USEFUL," resembling a clichéd advertising slogan. Although grammatically correct, this pairing is absurd in content, further reinforced by the absence of punctuation, inconsistent capitalisation, and fragmented text. Moreover, the story employs textual fragments marked by broken causal links, semantic nonsense, repetition, and absurdity, often utilising free word association, double entendre, and puns, thereby creating a fragmented, distorted reality that is often referred to as a "linguistic catastrophe." The resulting semantic chaos makes the short story feel like a collection of meaningless episodes, symbolising the degradation and cliché-ridden nature of modern language.

5.2 Different Postmodern Language Games as Expressions of the Ideological-Ludic Principle of Text Formation

The ideological-ludic principle is revealed through various language games that operate within large textual segments and sentences, resulting in fragmentation, incompleteness, absurdity, and total deconstruction of text coherence. In postmodernism, the term *ideological* is viewed as authoritative, referring to a stable expression that reflects a poststructural worldview. This term is commonly used to describe any belief system, whether in everyday life, religion, politics, or culture. During the postmodern era, social ideology was replaced by the ideology of the game (Connor, 2004; Eagleton, 1996), as postmodern creative outlooks cannot be separated from the illusory nature. Heisinga examines language games from a philosophical standpoint, emphasising features such as a hedonistic focus, rules, personal behavioural freedom, proceduralism, and the development of creative abilities.

The functional approach (Crystal, 2001) emphasises different language game techniques as expressions of comedy and as reflections of the linguistic personality's creative thinking. This view highlights their dynamic nature, functional paradoxes, and deviations from typical norms. Over time, researchers increasingly focused on the intentional breakage of conventional linguistic rules within the concept of "linguistic anomalies." With the emergence of the cognitive paradigm, a language game is seen as a non-standard activity, representing a unique form of unconventional thinking. Therefore, this research considers the ideological-ludic principle as the dominant factor in shaping contemporary American short stories within postmodern poetics of crisis.

The ideological-ludic principle manifests as a series of postmodern language games. This principle fundamentally involves intentionally breaking language norms, mixing word combinations, altering word formation rules, utilising koine and pidgin, inventing authorial neologisms, and even creating entirely separate languages. This refers to a special artificial language developed by J.R.R. Tolkien for his literary works, as well as the emergence of new meanings from combining incompatible elements. Numerous language games across different levels, combined with various repetitions pushed to absurdity and options to finish or continue parts of the work, transform postmodern American short stories into a kind of game environment. This feature enables the modelling of various meaning variants through "interactive reading."

When examining language games at different stages of development, we identify two distinct periods: *the pre-postmodern*, where it is seen simply as a form of language joke (such as puns, parody, paraphrase, or paradox), and *the postmodern*, where language games are regarded both as linguistic entertainment and as a method of organizing postmodern text. In this context, the main aim of the game is to create an artistic illusion that replaces reality, a concept fundamental to both the author and the reader.

Therefore, postmodern language games are increasingly viewed as a technique for creating texts, regarded as a strategic means of conveying the author's intention. Moreover, various games at different language levels (graphic, phonetic, lexical, syntactic, and textual) produce new puzzles, riddles, and codes as a postmodern literary text develops, which a dedicated and attentive reader must solve. Therefore, the variety of language games in postmodern literary works is growing, shifting from purely entertaining to transformative, which can alter the narrative and genre itself. Different postmodern language games are not only a key form of language humour, involving irony or grotesque elements, but they also serve as a way to produce texts that create a situation of a special agreement between the author and the reader.

This agreement reflects their shared understanding of the game's rules and their willingness to participate.

Traditionally, postmodern language games encompass pun, paradox, paronomasia, parody, paraphrase, and absurdist verbal poignancy, along with broader ideas and concepts. In the analyzed postmodern American short stories, we identify three types of language play based on the scope of the textual environment: *total*, *fragmentary*, and *sporadic*. *The sporadic language game* features a single stylistic device within a sentence, either to entertain the reader or to deepen the understanding of the author's concept. For example: "At that moment, the son manqué entered the room. The son manqué was eight feet tall and had a scrap woven from two hundred transistor radios, all turned on and tuned to different stations. Just by looking at him, you could hear Portland and Nogales, Mexico" (Barthelme, 2005, p. 67). The phrase "son manqué" can be translated as "prodigal son" if "son" is taken as an English word, or as "prodigal sound" if it is French, evoking the image of the prodigal son.

The fragmentary language game is conveyed through various stylistic and compositional techniques within text fragments, observable in specific passages both vertically and horizontally. It enables seamless transitions between the author's voice, character descriptions, settings, dialogue, narration, quotations, other people's speech, and the author's reflections and comments. In Goff's story "The Tao of Pooh," the author transforms into a scriptwriter-compiler who struggles to produce new, meaningful ideas. As a result, he adopts a purely postmodern technique of pastiche, parodying both himself and the postmodern world. This involves open borrowings from other works, such as A. A. Milne's *Winnie the Pooh and All All All*, and reworking its themes and plots. Hoff notes, "That was when I began to get an idea: to write a book that explained the principles of Taoism through Winnie-the-Pooh, and explained Winnie-the-Pooh through the principles of Taoism" (Hoff, 1982, p. 3).

The total postmodern language game is constructed through compositional techniques that contrast with the entire text's background. In this language game, cohesion is clearly lacking, caused by extensive commentary and authorial digressions disconnected from the main story, along with the disruption of traditional spatial and temporal relationships. The text includes lists, illustrations, photographs, documents, and information unrelated to the narrative, and fragments often stand alone as independent, unrelated pieces. Explicit signs of this language game include random section pagination elements inserted without a clear purpose, often lacking punctuation, and the use of different fonts. While the author openly reveals the artificial nature of this reality, postmodern art permits breaking conventional rules, which in turn fosters new ones. The overthrow of all rules leads to chaos and absurdity. This includes references like the play on the plot of the fairy tale *Snow White* in D. Barthelme's story, A. A. Milne's *Winnie the Pooh and All, All, All*, and the Taoist philosophy as explored in B. Goff's *The Tao of Pooh*. The identified types of postmodern language games, when overlooked by the reader, create an *absurd effect* that obstructs interpretation. In postmodern American short stories, absurdity functions as a playful, ludic tool and a means of destruction. Any absurd statement is inherently destructive because of the conflict between its expressive form and its content.

The creation of *ludic absurdity* (Babelyuk et al., 2021, p. 86) in the analyzed texts employs techniques such as fragmentary and sporadic language games. At the lexical level, it involves detaching words and phrases from their denotative meanings, leading to meaninglessness, and combining vocabulary from different styles in a single context. At the syntactic level, it includes using constructions with non-standard grammatical relations, often without punctuation. Additionally, at the textual level, total language game is achieved by transforming narrative

structures, omitting cause-and-effect links between sentences, and disrupting logical sequences within the text.

5.3 The Cognitive-Semiological Principle: How Specific Postmodern Poetic Devices Function in American Short Stories

The cognitive-semiological principle is defined through specific postmodern poetic devices, such as metabola, desire machine, doxa, episteme, simulacra, and pastiche. Analysing the semantics of literary texts through the lens of possible worlds (Doležel, 1998; Pavel, 1986; Ryan, 1991; Semino, 1997) allows us to see them as mental representations of reality. Therefore, the world depicted in a literary text is seen as a particular kind of reality that exists in the reader's imagination while reading and aligns with objective reality (Semino, 1997, p. 23). A crucial aspect of this research stage is that each literary text constructs its own unique textual world. Because of its complexity, this world can be understood as a set of interconnected subworlds that work together to form a cohesive whole (Semino, 1997, p. 92). Using the possible worlds modelling approach (Kušnir, 2009) within the diverse landscape of postmodern American short stories enables us to reveal the ironic meanings that arise from the interplay of these worlds.

The playful, associative nature of postmodern American short stories centres on the semantic multiplicity and paradoxes of their worlds: the conditionally real (Doležel, 1998; Pavel, 1986; Ryan, 1991; Semino, 1997), which relates to objective reality to some extent, and the quasi-real, which exists in the characters' imagination. Typically, *the real world* in postmodern texts adheres to the laws of objective reality (Maitre, 1983), yet it often appears chaotic, absurd, and devoid of historical significance. Because of the disconnection between the signified and the signifier, words, despite conveying their lexical meanings, fail to produce complete meaning. This makes it impossible to identify their referent or link the text to reality, knowledge, or ideas about the surrounding world. The absence of plot and development of events, along with monotonous character actions, causes "a freezing" of time and ultimately leads to the breakdown of spatial and temporal relationships. As a result, a claustrophobic sense of confinement emerges, with a reality that has lost its logical, coherent progression and fractured into fragments.

The quasi-real world, on the other hand, seems logical and natural because the characters' sick, alcoholic, or drug-addicted minds do not reflect the world's absurdity, cruelty, and immorality. These characters adhere to specific social and behavioural stereotypes, consistently striving for maximum rationality within their consumerist mindset, and often encounter serious moral dilemmas. Within the diverse realm of postmodern American short stories, these worlds collide, creating a new artistic reality. This results in a non-traditional, surprising interpretation of what initially appears to be absurd.

Metabola serves as a stylistic tool to convey postmodern irony about the chaotic world in postmodern American short stories. Unlike a metaphor, which relies on transferring meaning, often described as projecting one conceptual sphere onto another (Johnson, 1987; Lakoff & Johnson, 1980), and consists of only two parts (initial and resulting), a metaphor preserves the core elements but emphasises its intermediate connection. To distinguish metabola, we use the formula $B/P \leftrightarrow P \leftrightarrow R$, where B is the initial component, P is the intermediate, and R is the resulting component. The arrows connecting these components are bidirectional, not unidirectional, because in metabolism, each of the outer components can be seen as both the starting point and the endpoint, creating a comprehensive view of what is being compared and what it is compared to. In D. Barthelme's short story *Views of My Father Weeping*, the protagonist ascertains his father's death (he was run over by a carriage). Later, in his reality, a

man looking like the dead father mysteriously appears, sitting on the bed and crying: “However, I must say, it resembles my father. The resemblance is very strong. The man sitting in the centre of the bed looks very much like my father” (Barthelme, 2005, p. 62). The story’s ending mirrors the character’s absurd worldview as he inhabits a semi-real dream world, mistaking it for the reality of his crying father:

Why! . . . there's my father! . . . sitting in the bed there! . . . as if his heart would burst! . . . Father! How is this? Who has wounded you? Why, I'll . . . I'll . . . here, Father, take this handkerchief! for a doctor... for a priest ... for a good fairy is there ... can you ... can I ... a cup of hot tea? ... bowl of steaming soup? ... etc. (Barthelme, 2005, p. 64)

The combination of different stylistic elements, including the graphic design of this segment, the stylistic devices: “this handkerchief! ... and this handkerchief! ... and this handkerchief! ... I'll run for a towel (take this handkerchief and this one, and I'll run for a towel), a cup of hot tea? ... bowl of steaming soup?” (Barthelme, 2005, p. 63), endless continuation, the deliberate use of a mocking narrative tone “maybe a cup of hot tea or a bowl of steaming soup?” (Barthelme, 2005, p. 63), highlights postmodern irony, implying that everyday real life is seen as a theatre of the absurd. Moreover, the interconnectedness of various textual worlds and their ongoing transitions in the analysed story enhance metabola, expressed through the formula: O (initial component) = a run over man ↔ P (intermediate) = someone else ↔ R (resultant) = my father weeping. It demonstrates the continuous flux of diverse phenomena, highlighting the contrasts between textual worlds and generating a perception of a chaotic, fragmented, and simulated reality.

In poststructural philosophy, *simulacrum* (Baudrillard, 1994) is understood as the replacement of the real with signs of the real, creating a quasi-reality: a simulacrum might be an image resembling a digital photograph of something, but what it depicts does not actually exist and has never existed. Therefore, the postmodern era is often referred to as an “era of total simulation” (Baudrillard, 1994, p. 23). Furthermore, in postmodernism, information lacks intrinsic meaning; it merely “plays” with meaning, replacing genuine communication with a simulation of it. This shift underpins the postmodern worldview, shaped by mass media, and influences society’s state and public consciousness.

The postmodern device of simulacrum in postmodern American short stories involves applying extra (emotional, evaluative, linguistic, cultural, etc.) meanings to lexical units within a specific context. These meanings are closely connected to the basic dictionary definitions, thereby adding new layers of meaning. Therefore, in Barthelme’s story *The Captured Woman*, in the sentence: “I go into the kitchen and begin washing the dishes - the more scutwork you do, the kinder the Tight in which you are regarded, I have learned” (Barthelme, 2005, p. 23) the phrase “to wash dishes” is redefined to mean “to care,” while “scutwork” refers to “trivial, insignificant tasks.” The protagonist believes that such tasks can bring rewards in family life: for instance, a man washing the dishes demonstrates his caring attitude toward his wife. Therefore, washing dishes becomes a symbol of care.

In the simulation of reality, textual worlds interact by replacing the real world with a copy, the quasi-real world, as seen in D. Barthelme’s story *Paraguay*. The story is structured like a tourist guide, with sections on geography, climate, population, and economy, creating a seemingly realistic world expected to contain factual information. However, this world is mystical, where “silence (damping materials) is sold in paper bags like cement” and “citizens shed their skins.” (Barthelme, 2005, p. 56). It also describes strange phenomena, such as “everyone in Paraguay sharing the same fingerprints, adults increasing their walking speed with

rising temperatures, moving spontaneously, and heavy yellow drops like pancake butter falling from the sky” (Barthelme, 2005, p. 56). The intentional disruption of logical and semantic links between words, phrases, sentences, superphrases, and the use of semantic illogism, constructing sentences based on the illogical nature of the situation itself and its reality, creates an image of an absent reality, a “plausible semblance,” behind which no actual reality exists. This ironic approach to sense-making results in a simulation of reality, depicting something that genuinely does not exist.

Similarly, authors of postmodern American short stories use the technique of *episteme* (Foucault 1972, p. 34) based on modeling an illusory reality by desemanticizing lexical units and removing the meaning of concepts. This process generates new versions of knowledge, as shown in the further analysis of American short stories. Another key device of postmodern poetics is *the doxa* (Barthes, 1974, p. 12), which refers to a generally accepted opinion or representation. It is rooted in the conflict between the quasi-real realm of postmodern American short stories, which emphasize the absurdity of societal stereotypes, and the conditionally real world that presents human actions contradicting these stereotypes.

In postmodern American short stories, *doxa* plays a role in ironic commentary on stereotypes of the American way of life, as exemplified in D. Barthelme’s story *Me and Miss Mandible*. The contrast between different textual worlds is evident; in the conventional real world, the protagonist is 35 years old: “I am, in fact, thirty-five” (Barthelme, 2005, p. 56) and in the quasi-real world he is a student, because according to the school journal he is 11: “I am, according to the records, eleven years old” is accentuated by a comic situation: a teacher in love with an adult student is restrained from decisive actions “Miss Mandible wants to make love to me” only by his officially established status as a child: but she hesitates because I am officially a child” (Barthelme, 2005, p. 36). In this context, the postmodern *doxa* technique shows that the characters’ understanding of the surrounding world aligns with mainstream norms and standards, rather than actual reality. This intentional use of internal textual contradictions produces an ironic effect, as the “correct” guidelines are entirely absurd when viewed from the perspective of the altered reality.

Pastiche (Jameson, 1991, p. 5) as a postmodern device is defined as parody and self-parody, involving a deliberate ironic comparison of different literary styles, genre forms, artistic movements, behaviors, and social foundations. These elements are realized within the pace of a postmodern literary text, often blending different worlds in a varied and nuanced manner. Because of pastiche, the postmodern literary work reflects the author’s self-irony about his role as a compiler. This is expressed through a free mix of various text fragments that are often familiar and differ in semantics, style, and values. For example, the pastiche technique is employed to craft an ironic writing style in D. Barthelme’s story *Sentence*, which features a statement lacking a clear beginning and end, and presents an absurd collection of its parts:

or a long sentence moving at a certain pace down the page aiming for the bottom - if not the bottom of this page, then of some other page - where it can rest, or stop for a moment to think about the questions raised by its own (temporary) existence, which ends when the page is turned, or the sentence falls out of ... (Barthelme, 2005, p. 112)

At the start of the story, the removed metaphor and personification represent a concrete, logical world: a sentence that “runs down the page” (Barthelme, 2005, p. 112), possibly ending on the same or a different page, moving at a steady pace toward the bottom. Later, the narrative collapses, and the following fragments create an already illogical world where the personification mentioned earlier is intensified, increasingly endowing the described sentence

with human qualities: it can “rest, or stop for a moment and reflect on the questions raised by its own, albeit temporary, existence.” (Barthelme, 2005, p. 112)

Furthermore, grammatically correct phrases are linked only through syntactic coherence without carrying meaningful content. From an organizational perspective, this narrative construction is isomorphic and ascending, as it is impossible to trace the vertically built connections of lexical meanings of individual words and phrases and the overall content. Therefore, the contrast between the conditionally real and quasi-real worlds in postmodern literature reveals the irony of stereotypical logical thinking: postmodern writing demonstrates that the processes of writing and reading can evolve in an “unexpected direction” (Barthelme, 2005, 5), challenging the conventional quest for meaning.

The *desiring machine* (Deleuze & Guattari, 1987) postmodern technique manifests in the ‘givenness – desire’ scenario through the conflict of two contrasting intra-textual worlds: one representing the conditionally real state of affairs (givenness), and the other depicting the quasi-real realm of characters’ desires, where consumer consciousness views reality as a continuous flow of unlimited desires. R. Brautigan’s story *The Weather in San Francisco* can be viewed as an experiment with the desire machine narrative structure. The author appears to be attempting to recount a series of events that occurred in a butcher shop. It was a cloudy afternoon, and an Italian butcher was “selling a pound of meat to a very old woman” (Brautigan, 1989, p. 11). The characters’ remarks are perceived as heterogeneous, since there is no semantic unity between them. Each of the characters lives their own life, with their own feelings, thoughts, and desires, and does not respond to the statements of the others. An Italian butcher is trying to persuade an elderly woman to buy ground meat. In the real world, the seller’s reasoning appears quite logical: the woman is too old for so much natural meat: “She was too old for that much meat; the minced meat is ground by him and of good quality (lean) - I ground it myself. I put a lot of lean meat in it” (Brautigan, 1989, p. 11); on a cloudy, cool day, the appetite increases more than in the heat: “It’s a good day for hamburger. Look outside. It’s cloudy. Some of those clouds have rain in them. I’d get hamburger” (Brautigan, 1989, p. 11). However, the grandmother is lost in her world of desires, where it is a warm, sunny day. Despite the seller’s arguments, she decides to buy a pound of liver:

Hamburger is something else. Hamburger doesn't sound right. I don't want any hamburger, and I don't think it's going to rain. I think the sun is going to come out, and I want a pound of liver. A cloudy afternoon soon changed into a sunny day. (Brautigan, 1989, p. 11)

Using the wishing machine technique, the linear story development shifts to a montage, which introduces semantic meaning to disconnected text fragments and character remarks. This approach highlights the main idea: a contemporary individual functions entirely within their personal sphere of desires, reflecting postmodern rationalist awareness.

6. Discussion

The poetic analysis shows that postmodern American short stories have fundamentally changed how language, meaning, and reality relate to each other, leading to what can be called an “*epistemological revolution*” in postmodern literary discussions. This shift occurs by intentionally breaking apart traditional narrative structures, shifting from a straightforward sequence of events to complex, rhizomatic networks of meaning that challenge singular interpretations.

The poetics of crisis functions not just as a theme but as a core structural principle that shapes the overall architecture of postmodern texts. A key transformation in this poetic analysis

is the fundamental redefinition of how readers engage with texts. Postmodern American short stories have shifted from passive consumption to active participation, where readers play a vital role in constructing meaning. This shift democratizes literary authority, dismantling the traditional hierarchy between author, text, and reader, and encouraging a more fluid, collaborative relationship.

The rhizomatic principle of postmodern text creation, as shown in the works of Barthelme, Coover, and Hoff, marks a shift from traditional hierarchical storytelling to interconnected networks of meaning. This change highlights broader cultural concerns about authority, truth, and the fluidity of meaning in postmodern society. The text is seen as a dynamic, living entity that expands in many directions at once, reflecting the intricate and unpredictable nature of modern life. The poetic analysis reveals that the narrative crisis in postmodern American short stories acts both as an expression of and a response to contemporary cultural anxieties. The intentional use of ambivalence, fragmentation, and semantic chaos mirrors the disorienting experience of living in late capitalist society and also provides new perspectives for understanding and engaging with textual reality.

The ideological-ludic principle demonstrates that postmodern texts function more like interactive environments than static literary objects. Language games happen at various levels (graphic, phonetic, lexical, syntactic, and textual), creating what can be called “textual ecosystems” that require reader participation to be fully realized. Examining intertextuality in postmodern American short stories shows a complex interaction with cultural politics and literary tradition. These intertextual devices serve as active contributions to ongoing cultural discussions. Writers such as Hoff, who incorporates Eastern philosophy into Western children’s literature, illustrate how postmodern techniques can promote cross-cultural dialogue and philosophical integration. The postmodern sensibility created by various language games in these postmodern literary works functions as a form of cultural critique. It exposes the artificiality of dominant narratives and creates space for alternative perspectives.

The cognitive-semiological principle, utilizing postmodern tools such as metabola, desire machine, doxa, episteme, simulacra, and pastiche, develops alternative ways of understanding experience that go beyond conventional rational discourse. These postmodern devices do not merely depict chaos; instead, they introduce new organizational principles that more effectively capture the complexity of modern consciousness. As a result, “*semantic multiplicity*” becomes a valuable resource for managing uncertainty, rather than causing confusion or paralysis.

This essential poetic aspect of postmodern American short stories suggests that the poetics of crisis is not a form of nihilistic despair but rather a mode of creative destruction that opens the way for new possibilities. The suggested poetic analysis illustrates how postmodern American short stories have reshaped temporal consciousness in literature. Moreover, the breakdown of linear chronology and the rise of what could be called “*quantum narrative*” structures indicate significant shifts in how modern individuals perceive time and causality. This fragmentation of temporal order reflects the acceleration and compression of experience typical of digital culture.

The rise of “*television broadcasting*” and “montage thinking” during the metamodernist era highlights literature’s ongoing adaptation to new media. These developments imply that literary forms persistently evolve to reflect changing technological and cultural landscapes, ensuring literature remains relevant while its core features transform.

7. Conclusion

The poetics of crisis, rather than indicating a final state, functions as a transitional approach that opens the way for new literary forms of cultural expression and social organization. The postmodern poetic techniques and insights developed through postmodern literary experimentation (a case study of American postmodern short stories) offer valuable resources for navigating ongoing cultural and poetic shifts while maintaining a critical awareness of the constructed nature of postmodern and metamodern social reality. The integration of semiotics, narratology, cognitive poetics, and possible world's theory in methodology shows the importance of interdisciplinary approaches for understanding modern literary phenomena. Future research should focus on developing synthetic methods capable of addressing the complexity and multidimensionality of postmodern textual practices.

The trajectory outlined in this poetic analysis indicates that the American short story genre will continue to evolve in response to changing technological, cultural, and social conditions. The rise of digital culture, artificial intelligence, and global connectivity creates new environments for narrative experimentation that build upon postmodern innovations while addressing current concerns. Identifying three distinct developmental literary periods in the evolution of the American short story (pre-postmodern, postmodern, and metamodern) provides a framework for understanding how literary forms and cultural expressions continue to develop. The emergence of metamodernism suggests that postmodern strategies are being combined with new concerns and techniques, forming hybrid styles that maintain critical distance yet aim for renewed engagement with social and cultural issues.

The poetics of crisis is based on three core principles: the rhizomatic principle of narration, the ideological-ludic principle, and the cognitive-semiological principle. These are not only thematic but also serve as the structural framework that shapes the architecture of postmodern texts. The rhizomatic principle of narration manifests through narrative crises driven by multiperspectivity, meaning destabilization, ambiguous plot elements, and a postmodern attitude. The ideological-ludic principle appears through various language games within sizable text segments and sentences, leading to fragmentation, incompleteness, and the breakdown of coherence. The cognitive-semiological principle involves specific postmodern poetic devices like metabola, desire machine, doxa, episteme, simulacra, and pastiche, which underlie a distinctive postmodern ironic style. This poetic analysis indicates that experimentation ultimately has positive roles by exposing the temporary nature of all meaning-making systems and opening space for more inclusive and flexible understandings. Consequently, the poetics of crisis functions as a means for social and cultural renewal, not destruction.

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Crisis and Redemption: Myth, Religion, and Discourse in Dante Alighieri's Inferno

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Abstract

Dating back to medieval times, crisis in the social, political and religious context found expression in various forms of discourses. This paper provides an exploration of Dante Alighieri's "Inferno" as admittedly a crisis discourse, an inevitable descent into the hell of human perversity that guarantees a new spiritual renewal. This paper probes the crisis of a medieval Christianity that betrays itself by failing to keep its discourse and its practices in tune. Dante makes this religious crisis more discernable by casting a hierarchy of sins and adapting the contrapasso of visual arts to it. This will be fully apprehended in Dante's choice to write a comedy in the vernacular Italian which is decidedly a medieval discursive response to the dismays of religious and political corruption. The first part gives sense to this religious crisis by exploring the metaphor of the astray pilgrim and the three beasts in the dark woods. Part two draws centrally on mythic characters as both signals of a looming danger and order-restituting agents. The third part teases out Dante's infernal justice by highlighting his intrinsic questioning of the lot of pagan philosophers in Limbo. The final part considers Dante's veneration of his mentor Brunetto Latini as a conscious reincarnation of the Platonic erastes/ eromenos same-sex relationship. While the first two parts delineate the edges and the boundaries of the crisis discourse, the last two detect the reintegration of the pagans and the sodomites as arguably a classical instance of discourse crisis.

Keywords: crisis, discourse, homoeroticism, religion, myth

1. Introduction

After more than seven hundred years of its first publication around the year 1321, Dante Alighieri's "Inferno" aroused and is still arousing scholarly interest. In fact, this poem is the first and most widely-read canticle of his trilogy *The Divine Comedy* (Hillis, 1922, p. 31). Ranked as one of the highly-read books during the Covid 19 lockdown, many articles were written reflecting on this global crisis using the medieval lens including Beatrice Sica's "Reading Covid-19 through Dante" or Michele Vitacca's "The Cruel Journey Through the COVID-19 INFERNO". This expanded contemporary interest into "Inferno" as a canonical conversation with crisis and a discursive reframing of the dynamic of divine redemption is unequalled. By transcending the temporality of his age, Dante anchors his poem within the realm of crisis as a universal and eternal human reality. The poem's openness to the political and spiritual quandaries of the modern world makes it a perfect answer to its queries. By writing "Inferno", Dante leads the debate on how man's inventiveness in times of crisis can connect with the universal. The moral architecture of his hell is still a valid guide to coping with crisis.

First, the exploration of the political crisis in Medieval Florence will reveal an abhorrent scene of fracture and antagonism between the Guelfs and the Ghibellines. Through the identity of the Exile, Dante unearths that these unruly and unbound contesters dispute not only each other's ideas but even their counterpart's eligibility to belong to the Florentine land. Second, the nine infernal circles have each at their threshold a mythic figure that not only guards its

premises but also reminds the reader of the universality of the spiritual crisis. In the third part, Dante revisits divine justice by placing the pagan philosophers in Limbo and by experimenting with the Contrapasso, an aesthetic move in which the punishment fits, reflects and at times rectifies the crime. Finally, the analysis of comedy as a genre, the vernacular Italian as a tool and homoeroticism as a sexual orientation will reveal Dante's poem as an unprecedented manifestation of a discourse crisis.

2. Literature Review

After years of teaching and lecturing on Dante, Reynolds (2006) starts her book *Dante: The Poet, The political Thinker, The Man* by a humble apology to her students for being submerged by what she calls her "excess baggage" (Intro.p. xi). Before writing her book, she engages in re-reading Dante's oeuvres anew leaving behind the limitless bulk of *Lectura Dantis* that crippled and manipulated her interpretations of the poem. Yet, ironically enough, it is probably the deep and extensive review of the poet's critical literature that enabled her to see the poet with a new lens.

My literature review will be thematic, in essence. In the first part of this paper, I will analyze the centrality of the first canto as a poetic illustration of the political crisis in Thirteenth-Century Italy and Reynolds book will be of considerable help especially its third, fourth and the nineteenth chapters which rightly qualify the Florentine political crisis as a real disaster. Other sources have had a major impact in illuminating the controversies of political rivalry and treachery (Reynolds, 2006; Coulton, 1907; Slattery, 1920; Hillis, 1920; Barolini, 1984). As far as the second part is concerned, the mythological vein in Dante's poem has been studied by several critics both old and recent. Yet, unlike these critics' mono-focus on one mythic figure namely that of Minos for Barolini and that of Geryon for Reynolds, my approach will rather take a wider scope by shedding light on the Harpies, the Minotaur, Charybdis and Scylla as immortal alarms to the fallibility of Man (Hendricks, 2024; Reynolds, 2006; Mazzotta, 1993; Cassell, 1984; Barolini, 2006; Barbi, 1954; Campbell, 2004/2023; Leeming, 1998/2010). My third point of focus will rely heavily on studying Limbo as a liminal stage and a piacular ritual. This fresh approach will give Barolini's traditional conceptualization of the encounter more depth through the appropriation of the sociology of Durkheim's *The Elementary Form of Religious Life*. In their anthology *Dante for the New Millennium*, Barolini and Storey collect essays that explore *Inferno* as an ancient arena for the formation of queer identity (Barolini & Storey (Ed.), 2023; Barolini, 2006; Befell, 2011; Baur, 2007). My contribution consists mainly in exploring the Sodomites' position in hell as a stylistic *Trompe l'oeil*. The fourth part, thus, will come to the central crux in this understanding of Dante's cleverly hidden infernal homoeroticism.

2.1 The Political Crisis

A strong scholarly emphasis is laid on Dante's success in removing the tension-ridden political crisis of his Tuscany from the historicity of its discourse. Hawkins and Jacoff (2023) explore the dialogue that "Paradiso" rather than "Inferno" has engaged with poets like Thomas Stearns Eliot or the Irish poet Seamus Heaney (Barolini & Storey (Ed.), p. 451-64). The split in the American political scene nowadays between two antagonizing entities, the Republican and the Democratic parties, does not drift away from the model that Dante's *la mia terra*, Florence, offers. This article focuses on the medieval hell as an arena fit to display this conflictual political scene. Dante's political crisis is in perfect accord with Bellah's (2006) definition of the crisis of modernity as "Disturbances, outbursts, [...] irrationalities and horrors of all sort, mass executions, mass imprisonments, wars of annihilation, revolutions, rebellions and depressions" (265). The eras might differ but the crisis's terminology remains the same.

Dante-character is portrayed as tragically caught in a kind of “Holy Midway”, a crisis to which the initial lines of the poem “Nel Mezzo del cammin di nostra vita/ mi ritrovai per una selva oscura/ Ché la diritta via era smarrita” or “In the midway of this mortal life, / I found me in a gloomy wood, astray/ Gone from the path direct” become a universal tag (Alighieri, 1320, Canto I, Lines 1-2-3). At the macro level, the church in the person of the pope and the empire in the person of the king wrestled to secure sovereignty over the Florentines. Zooming the lens for a close up, however, depicts the deeply-rooted conflict between the Guelfs and the Ghibellines as warring factions that divided the political scene into two antagonistic parties. Through the initial scene of the pilgrim surrounded, in disarray, by a panther, a lion and a she-wolf, the poet captures via zoomorphism a scene highly emblematic of the Florentine crisis. Greed for absolute power and disregard of the common good controls the ruling political figures “Still after food more craving than before” in the Longfellow (1904) translation and “ [...] In [their] leanness seemed/ Full of all wants” in Cary’s (2009) (Alighieri, 1320, Canto I, Lines 46-47).

Dante poetically visualizes his hopes for the strong grip of an emperor capable of bringing back peace, unity and prosperity to his Florence. All his aspirations compile in a historical figure capable of bringing salvation to Italy “A greyhound” who can destroy the beast. The biblical allusion proper to the greyhound metaphor deploys a medieval ruler who, in stark contrast to the traditional medieval pontiffs’ fat posture, stands out as a thinly-waisted, strongly-chested king. By omitting the heavy stomach, Dante revises the image of the Pope shackled by his earthly lust, revives the Bible as a rich repertoire for eliciting meaning and reshapes the archetype of the emperor who rules by love, wisdom and virtue. Dante’s desperation is translated poetically in the punishment he designed for those guilty of Simony. In the eighth circle of hell, Pope Nicholas V is pictured as fixed with head downward in the ravenous apertures with solely his burning soles outside “Reversed, and as a stake/ Driven in the soil” (Alighieri, 1320, *Inferno*, Canto XIX, Lines 48-49).

Dante’s “*Inferno*” is often quoted in political discourse, namely that of Franklin Roosevelt’s acceptance speech 1936. In an explicit condemnation of neutrality, Roosevelt boldly declares “Government can err, presidents do make mistakes, but the immortal Dante tells us that divine justice weighs the sins of the cold-blooded and the sins of the warm-blooded in different scales”. Indeed, Dante expresses his repudiation of neutrality as the crime of those who refrain from taking sides by introducing them as “An ill band /of angels mixed, who nor rebellious proved, / Nor yet were true to God, but to themselves/ Were only” (Alighieri, 1320, *Inferno*, Canto III, Lines 35-38). Their punishment recalls back De Valois’s nickname “Lackland” for neither do they belong to hell nor to heaven. Capaneus, however, the blasphemous pagan warrior standing on the walls of Thebes, is placed in the seventh circle of hell closer to the abyss but worthy of paradise nonetheless for his bravery and courage.

Yet, as he indulges in this journey through the foibles of humanity, the poet proceeds toward the hollow abyss startled constantly by the rapacious monsters of mythology.

2.2 Mythology and Hybridity

Through the boiling streams of his Hell, the pilgrim retraces his spiritual journey from the corporeality of flesh to divine wisdom. Processing this wide spectrum of human sins provides the contours of the fallible nature of man. The multiple mythic encounters illustrate this bestiality by an androgenic blending of human and animal traits. Dante denudes man’s failure religiously deploying it in terms of a spiritual crisis. His poem rightly formulates an adamant “Attempt to reform humanity and particularly Italy, which was steadily moving away from the ideal of a truly political and Christian life” (Barbi, 1954, p.70). Yet, in stark contrast to Barbi’s

claims that the mythological figures in “Inferno” are a mere ornament or a structural detail, my argument carefully aims to infer that myth is fundamental in delineating the universality of crisis. Dante, indeed, uses his poem as a canvas on which to re-paint these mythic figures as frightening signals of an apocalypse of mores.

Unlike Greek mythology, Cerberus stands out as utterly unaffected by Orpheus’ sad music while performing his duty of guarding the third circle reserved to the gluttonous. His big belly, however, is a mimic reproduction of their unleashed greed. In the intensity the poet laid on the dog’s claws tearing the spirits’ bodies into pieces lies a serious condemnation of gluttony as the main sin tearing and wearing Florence and Florentines apart as Ciacco explains in Canto VI. Here, myth aims primarily at reinforcing the poem’s historicity. Myth’s potentiality of shared meaning across time is another attribute that Dante skillfully unravels. Campbell (2004) strongly advocates that myth encompasses the whole realm of human experience and hence binds people all around the world together with its universal character. Dante pins mythological figures to the inner world of human perversity construing in this sense a spectrum of appalling sins ranging from lust, greed, avarice, fraud to violence. This angle is specifically caught in the mixture of animal and human traits. Minos the infernal judge and the ghastly guard of the second circle is not only in charge of labeling the sinners depending on their transgression but he uses his girded tail to measure their sinful confessions and direct them toward their corresponding circle. In this respect, Dante’s engagement with myth does confirm Campbell’s conviction that “The hero, therefore, is the man or woman who has been able to battle past his personal and local historical limitations to the generally valid, normally human forms” (p.18).

The function of these mythic terrifying monsters goes beyond the torture of sinners to be irrefutable ancient reminders of the blending of man and animal traits. Dante used myth to reinforce this hybridity as timeless and to alarm humanity of the looming threats of a withering religion. Is not his Minotaur half man half bull? Are not his Centaurs part man part horse? Are not his Harpies half-women half-birds? The mythic hybridity of human form and animal traits renders these rapacious monsters an immortal reproduction of man’s bestiality. His theory of a flawed humanity calls the need for a strong mythic theory capable of diagnosing and hopefully regulating the medieval deteriorating mores. If crisis is inevitable in human history, then it is the aesthetic handling of these quandaries that makes a difference and that gives critical historical eras their distinctive character and unique particularities. Hillis (1922) ponders on Dante’s experimentation with myth when he boldly states:

We stand aghast at Dante's miseries and monsters, furies and gorgons, snakes and fires, lakes of pitch and pools of blood, a physical hell of utter and unspeakable dreariness and despair. But Dante's was an era of outbreking and almost universal physical cruelty; sinners and criminals could not be reached by argument, for they could not think; there was but one way to approach animal man, and that was from the animal side. (p. 28)

I have quoted this passage at length in order to clinch the idea that Dante’s hell does familiarize man with the naked truth about his bestiality. The mythic discourse is meant to loosen the grip of the religious one. It is a return to what is most basic and elementary, a return to the immortality of the universal. When greed takes over divine wisdom and when the wild emotions take over the custodian reason, a need for a new discourse becomes more than vital.

3. Dante’s Revisited Divine Justice and the *Contrapasso*

The first poetic readjustment is concerned with the lot of pagan thinkers whose literary, philosophical and poetic achievements should make up for their anteriority to a Christian faith. Re-inclusion into a view of divinity is a reformation measure that cauterizes the effects of the

ravine on them by granting them exemption in Limbo. To this tribe of “sublime bard[s]” not only Homer, Flaccus, Naso and Lucan belong but also Virgil and Dante, too. The poet secures his place by being the “sixth amid so learn’d a band” (Alighieri, 1320, *Inferno* Canto IV, Lines 97- 75-76). Like a Durkheimian piacular rite, Dante does not subject them to any kind of punishment or torture rather he replaces suffering by woe and sadness. He insidiously incorporates his questioning of the validity of penalizing them for a Christianity they did not witness historically. When Virgil introduced the thinkers in a state of liminality, their sorrow is the poetic wergild they paid. How similar is their grief in these lines to the father of sociology’s definition of the above-mentioned tribal piacular ritual.

[...] No plaint was heard
 Except for sighs, that made the eternal air
 Tremble, not caused by tortures, but from grief
 [...] Since baptism was not theirs.

Compared to Durkheim’s (1995) words “ Like joy, sadness is heightened and amplified by its reverberation from one consciousness to the next, and then it gradually expresses itself overtly as unrestrained and convulsive [...] cries and shrieks of pain” , these lines enact the dynamics of sorrow as a kind of suspension between despair and hope, hell and heaven (p. 403). Limbo is one out of many outward manifestations of religious life in which the intensity of the sighs of emotive sadness surprisingly takes over the rueful wailings of the smitten sinners. Grief and not torture is the sanctioned penalty for redemption and purification of the souls who “lived before the Gospel” (Alighieri, 1320, *Inferno* Canto IV, Line 35). However, by registering into this band, Dante marks red his pronounced preference of a reason without religion to a religion without reason.

In his exploration of the horrendous sins of Man, Dante conjures a hierarchy where the crime and the sin are a perfect match. As early as Canto VI, Dante introduces *contrapasso* as the main engine of his theory of justice in which “Like crime incurred like punishment” (Alighieri, 1320, *Inferno* Canto VI, Line 56). When he harnesses the *contrapasso* to embalm the moral imperfections of his age, the poet intrepidly restitutes order into his otherwise disorderly Florence. How penetrating is the image of the suicide Pier della Vigne whose hellish retribution is to be vegetatively reborn into a venomous tree where Harpies nest. Every infringement of the sacred calls in a customized retributive punishment. The popular idea that avarice and prodigality are opposites fails when Dante’s grouping brings about their commonality. They are both acts of excess whether it is extreme desire of possession or extreme lack of temperance. The two opposites become one just like the myth of Charybdis and Scylla if a mariner escapes one he can never escape the other. They loom as human sins at each extremity but do reflect the same incontinence toward earthly desires. The avaricious and the prodigals are reunited in the fourth circle of Dante’s hell. Dante’s *contrapasso* allows the poetic meeting of “These from the tomb with clenched grasp” and “Those with close-shaven locks” (Alighieri, 1320, *Inferno* Canto VII, Lines 57-58). In his insightful book, *Dante’s Fearful Art of Justice*, Cassell (1984) defines *cantrapasso* as “The justice of retaliatory punishment” (p. 3).

Although the medieval poet uses the term only once in his “Inferno”, he nonetheless transports the weight from the two legs of his fractioned Florence statue just to give the clenched third leg of his “Purgatorio” the possibility to exist. *Contrapasso* is a stylistic movement away from the binaries of medieval thought toward an openness vis a vis a third uniting party.

4. Comedy, the Vernacular and Homoeroticism: Manifestations of Discourse Crisis

In his historical biography *From St. Francis to Dante*, Coulton (1907) rightly qualifies the Thirteenth Century as a “Wicked World” (p. 49). He clustered scholarly citations that denote this aura of moral and religious squalor. It is not a pinch of despair rather it is a strong sense of senile decay that transpires from De Vitry’s description “The world is very evil and the times are waxing late”, “Days of uttermost perdition” in Adam Marsh’s terminology (Coulton, p. 55-56). It is against this intolerable atmosphere that Dante wrote his *Commedia Sacra*, a poetic outcry for a spiritual renewal, a moral revival and an exposure of sins. Yet, Dante Alighieri chose hope to despair, love to hatred, adjustment to eternal punishment, ascent to descent and purgatory and paradise to hell. Comedy is a central clue to understanding Dante’s transcendental ideas for social, religious and political reform. Hillis (1922) rightly advocates “Before singing his song Dante had to invent his harp” (p. 12). Shunning away the classical Tragedy and the Latin of Sophocles, Homer, and Virgil, Dante’s comedy and his vernacular unveil the medieval poet’s successful bidding on what is communicated rather than the ornament. The mundane profane Tuscan linguistically guarantees a wider readability and spiritually serves an indiscriminating access to the sacred. A philosophy of hope and redemption is what Dante calls for.

Comedy unfolds as a coming out of Dante Alighieri as a homosexual. My analysis of canto fifteen of the poem demarcates the medieval same-sex patronage as a non-normative discourse in which marginalized sexuality is brought back to the foreground. In a tricky hierarchy of sins, being placed in the seventh circle of Inferno, Sodomy’s position satisfies a medieval society where punishment of the individual reassures the common consciousness of the collectivity. Yet, the interaction with Brunetto Latini unveils the fact that this sin — apparently two circles away from the pit of the abyss — is actually a poetic “trompe l’oeil”. This visual allusion is meant to keep the Catholic Church unoffended. Upon a closer scrutiny, though, it unravels a mid-position where the sodomites are as far from hell’s gates as they are from its bottom. This poetic relocation is Dante’s way of responding to the frenzy of putting the undisciplined individual at the stake as a kind of psychological reparation of the community’s insecurities. Facing tragedy with perversion seems to be an already trodden path that Dante takes in his “Inferno”, canto XV. Paying attention to the poet’s awareness of sexual orientation as an identity and a minority marker is an important part of understanding Dante. By exploring his daring resistance of the confines of a Judeo-Christian culture where sodomy is considered “an abomination” deserving the death penalty, the aim of this poetical genuine sympathy with his teacher is to decrypt the homosexual in Dante. Latini is quite reminiscent of Socrates as the older *erastes* and Dante stands out as the young boy Alcibiades, an *eromenos* in Plato’s (416 BC) *Symposium*. This literary patronage serves to both gratify the old man’s sexual drives and to provide for the young boy an opportunity to benefit from his tutor’s knowledge.

The main organization of Dante’s hell depends heavily on a hierarchal climactic classification of sins. The closer the sinner’s circle to the earth’s centre, the more notorious is the sin and the farther they are from God. By placing the sodomites in the seventh circle of his hell, Dante gives this sin a midway position with eleven sins of lesser degree namely paganism, lust, gluttony, avarice, greed, wrath, sloth, heresy, murder, suicide, blasphemy and nine sins of worse degree such as usury, fraud, simony, sorcery, corruption, theft, fraudulent rhetoric, schism and treason. Part of Dante’s modernity lies in this celestial justice that he chooses and defends. What Dante proposes is an answer satisfying to the theologian in him for he rightly placed these sodomites in the seventh circle out of nine in hell. Yet, probing deeper into the analysis of his poem unearths a drastically different cosmology in which sodomy is situated

midway from the earth's centre as it is from God — a strategic move on Dante's part. This is precisely what I am referring to by evoking the notion of poetic *trompe l'oeil*.

5. Conclusion

In his book *Great Men as Prophets of a New Era*, N. D. Hillis (1922) celebrates the immortality of the poem by affirming that “Parthenons and cathedrals crumble, tools rust, bridges decay, bronzes melt, but the truth, put in artistic work, survives war, flood, fire, and the tooth of time itself” (p. 10). Through his poem, Dante gives to crisis the ubiquitous feel of the universal both politically and religiously. Exploring the placement of philosophers and poets highly venerated by Dante Alighieri himself in the Limbo of his Hell, defends the view point that Dante's hierarchy is not arbitrary rather it goes along a strongly-calculated revision of a Christian justice that seems to fail its promises. Along the new discursive justice, Dante's scene with Brunetto Latini gives queer identity a strong, historical poetic and artistic foundation, a claim to discourse. Epictetus concedes that “Crisis is [meant] to test us. We must realize that the moment is come to show whether we have learnt our lesson” (Epictetus, p. 59). Dante learnt this and communicates it to every reader who lays eyes on his “Inferno”. Yet, looking around the world today, this paper sarcastically questions “Have we learnt ours?”

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The Resolution of the Trauma Crisis in Toni Morrison's *God Help the Child* (2015)

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Abstract

This chapter examines ways of handling identity crisis rather than the factors that give rise to it in literary discourse. It approaches the fictional construction of crisis, trauma and healing as interrelated concepts that are also closely connected with the destruction and reconstruction of Black identity. It is a qualitative study, premised upon a close reading of Toni Morrison's last novel *God Help the Child* (2015), in which the major protagonists are children, traumatized by adverse childhood experiences. Abusers are toxic mothers and a racially oppressive cultural context, in which whiteness and blackness, of all shades, still fail to cohabit. Despite the significant space the identity crisis occupies in the narrative, it is the resolution of trauma crisis that this chapter exclusively concerns itself with. This approach reinforces the established fact in the research literature on the relationship between 'crisis' and 'trauma,' stipulating that the management of the former is contingent upon the healing of the latter. The in-depth analysis of Morrison's elaborate trauma healing model is the paper's main focus, for what she proposes has the potential to liberate generations of Black mothers and daughters from the complex crisis of psychological trauma. This recovery model is advanced as Morrison's original contribution to the successful resolution of the Black self's crisis. It is the author's legacy not only to her own folk but to all victims of psychological trauma, provoked by any form of crisis, as well as trauma healers, psychotherapists, and mental health professionals.

Keywords: Childhood trauma, crisis management, identity crisis, literature in crisis, Toni Morrison, trauma resolution

1. Introduction

No death, no doom, no anguish can arouse the surpassing despair which flows from a loss of identity (Lovecraft & Hoffmann Price, 1934, Chap. 4).

This study grapples with one of the most important crises, the crisis of identity defined as "the first-person sense of discontinuity that might occur in situations where an individual becomes unable to establish continuity between their past and current self-concept" (Gligorov, 2023, p.55). Psychoanalysts and trauma theorists refer to this disruption as the "splitting of the ego" (de Mijolla-Mellor 2025, para. 3), a kind of dissociation experienced by victims of childhood trauma to cope with the "break with reality caused by an irreconcilable idea" (para. 3). The aim of this study is to explore Toni Morrison's fictional approach to the identity crisis of the Black self, triggered by unresolved childhood traumas, in her last narrative *God Help the Child* (2015). Though a recurring theme in literature, this renewed interest in 'crisis' is primarily stimulated by the writer's belief in the possibility of its resolution, so evident in the originality and effectiveness of her approach. By considering 'trauma' and 'crisis' as the two sides of the same coin, and making the successful management of the identity crisis contingent upon the effective healing of childhood traumas—the central idea and ultimate target of this study—Morrison

gives hope to trauma victims, whose sense of self is shattered by the wound to “dignity” (Morrison, 2015, p. 4).

Premised on Morrison’s trauma-informed understanding of the psychological disorder, ensuing in the aftermath of identity crisis, the present textual analysis targets the achievement of two specific objectives:

- 1- To examine the aesthetic representation of mental and psychic pain disconnection from the authentic self generates as a result of child abuse and systemic racism.
- 2- To provide an in-depth analysis of the healing model Morrison proposes to escape the trauma trap, resolve the identity crisis, and ultimately break the multi-generational cycle of the trauma-induced crisis.

Recourse to the crisis discourse provides a unifying conceptual paradigm that would help address two types of crisis and ways of resolving them: the alleged crisis in literature and the humanities, and the crisis of Man as Morrison represents it in her last oeuvre *God Help the Child*. This approach is meant to create a balance between the two sections of the chapter, which will open with a brief critical overview of the scholarship on the interfaces of literature and crisis, on the one hand, and trauma and crisis, on the other. The discussion will then proceed to an in-depth textual analysis of the healing model, which Morrison envisions as a prerequisite for the successful management of the trauma crisis.

2. Review: The Interface of Literature and Crisis

Despite the increasing instability of the current world shaken by an unprecedented polycrisis, some researchers could not make sense of the “modest amount of direct attention [the topic of crisis has so far received] from scholars of literature, narrative, and rhetoric” (Kovach et al., 2017, p. 1) in comparison to the media culture (p.1), in which “crisis talk [is] most ubiquitous” (Gilbert, 2019, p. 101). This claim should nevertheless be taken with a pinch of salt, for the relevance of a ‘crisis’—“that point in a story or play at which the tension reaches a maximum and a resolution is imminent” (Cuddon, 1999, p. 195)—to the plot of a great story is common knowledge in literary studies. Similarly, it is beside the point to doubt the fact that a great deal of timeless literature owes much of its success to the effective portrayal of identity crisis. Actually, depiction of the character’s struggles with self and social alienation is what readers often find most appealing. Plays and works of fiction spotlighting the protagonists’ internal conflicts, due to failure to reconcile personal desires with societal expectations, abound in classic and modern literature.

Consequently, the following review, restricted to the existing scholarship on the interfaces of crisis and literature, and crisis and trauma, is likely to mitigate the former conclusions and uphold the latter counterarguments. Contrary to all expectations, surveying the literature reveals that the term ‘crisis’ does not only collocate with literature but has almost developed into a paradigm similar to that of trauma theories and the “crisis paradigm” some writers use “as a way of framing social scientific or political concerns” (Gilbert, 2019, p. 9). Indeed, crisis seems to permeate all aspects of literature and related fields. Interveners in the production and consumption of literature like writers, critics, reviewers, analysts, readers, teachers, researchers and publishers have frequently cried crisis and reached to crisis discourse in order to depict the challenges they are facing in their respective fields.

2.1 Literature in Crisis

Some of those who cry crisis contend that literature itself is in crisis (Carbone, 2024; Farrell, 1981; Lehtimäki, 2024; Lind, 1939; “National Endowment,” 2002; Scott, 1959; Scott, 2023).

The diversity of the advanced diagnoses, detected symptoms and causative factors mirrors the different meanings critics attach to the concept of crisis—a fact that confirms its “semantic vagueness and resistance to systematic analysis” (Mohd & De Rycher, 2013, p. 6). In general, critics tend to zero in on the decreasing relevance of literature to the modern reader. For instance, Lind (1939) depicts the literature of early 20th century as lacking in “abiding vitality and viewpoints” (p. 35); a judgment that reiterates that of Yeats’ (1919) on what makes good literature. For the Irish poet, the best of his era’s literary production is devoid of “conviction” and “theme” in comparison to an abundance of intensely passionate literature (as cited in Scott, 1959, p. 182). Furthermore, and in consideration of his unmistakable aversion for the “aesthetics of the ‘art for art’s sake’ ” (1940, p. 198), Lind laments literature’s lack of responsibility, morals and “social significance” (1939, p. 345), which he believes constitute “the ideal function of literature” (p. 198). This perspective is shared by other critics like Scott (1959) who reduces the problem to a “crisis of values” (p. 182). Similarly, Samulyte (2016) thinks that art does not exist in a vacuum, nor can it acquire any social significance unless the artist engages, wholeheartedly, with their society’s problems (p. 5). Echoes of these mid-19th and 20th centuries arguments are found in Roche’s (2004) book, *Why Literature Matters in the 21st Century*, in which the writer locates the real crisis of contemporary literature in its “inattention to the ethical challenges of modernity” (p. 3), posed by natural and human-caused multifarious disasters.

For other critics, the “real crisis” in literature, criticism and the humanities, in general, is “intellectual [not] economic” (Steinmann, 1978, p. 9), as American universities prefer to invest not in what Williams (1873) depicts as “the best that has been known and said in the world” (as cited in Steinmann, p. 9), but in consumer goods. This identified by Steinmann business-like mentality has also affected the book market. As critic Farrell (1981) explains, skyrocketing sales of books in the 1970s and 80s should not be taken at face value and interpreted as a wellness indicator, for “books are not synonymous with literature” (p. 13). Indeed, close inspection reveals that most bestsellers are not highbrow literature but reflect a dramatic change of the readers’ taste toward the sensationalism of romance, crime, horror, and spirituality fiction (p. 13).

Additionally, Plato’s (5th c. BCE) depiction of books as media that “give a soul to the universe, wings to the mind, flight to the imagination, and life to everything” (as cited in Kowalczyk, 2023, “Quote 18” section.) seems to have lost all meaning in a world invaded by social media, where “visibility [is] frequently ... conflated with quality” (Norton 2023, para. 7). Despite the “transformative power of literature” (“Reading at Risk,” 2002, p. 7) and its scientifically proven benefits for “mental health and wellbeing” (Billington & Steenberg, 2021, p. 394), statistics show a steep decline in “active and engaged literacy” (Gioia, as cited in “National Endowment,” 2002, p. 2). Consequently, those who have assessed the health of literature perceive the crisis in literature as partly caused by “reading [being] at risk” (Gioia, as cited in “National Endowment,” 2002, p. 2). While the bottom line of a 1982 report saw the reading crisis as symptomatic of a “rising tide of mediocrity” overtaking the American educational system (as cited in “Reading at Risk,” 2002, p.7), that of 2002 foreshadowed “an erosion in cultural and civic participation” (p. 7); a level of social and political consciousness that only a “well-read citizenry” can attain (p. 7). *The New York Times* critic Scott thinks that fear of reading canonical literary texts, which are overridden by a rising interest in pop culture and contemporary literature, constitutes a real threat for the students’ critical thinking skills (2023, para. 5). Today, many point the accusing finger toward electronic media, which they hold responsible for the crisis in arts and literature, in particular (Carbone, 2024; Lehtimäki, 2024).

2.2 Literary Criticism in Crisis

By comparison to literature, the crisis hitting literary criticism is believed to be “so severe that the system itself appeared beyond repair” (Hohendahl, 2016, p. 11). Some writers have gone so far as to declare the critic ‘dead’ (Cain, 1984; Eagleton, 2010; McDonald; 2007); a pronouncement that echoed that made by Barthes (1977) who also announced “the birth of the reader [which he argued] must be at the cost of the death of the author” (p. 148).). “Authorial intention” was thought to be obsolete with the public laying claim to its right “to evaluate its own cultural consumption” (McDonald, 2007, p. 4). As Norton convincingly writes, the purpose of criticism is to help readers “to improve [their] perceptual skills, to hone [their] powers of discernment and evaluation, [and to] develop a more sophisticated taste ... and a deeper understanding of aesthetic experiences” (2023, para. 4). Nevertheless, and as this survey demonstrates, the profession seems to have gone through much more intense moments of crisis than literature. This situation has led to an unequaled upsurge of writings—mostly elegiac—on the status and responsibility of the critic, in addition to speculations about the causes of the crisis.

In *The Death of the Critic*, McDonald (2007) mourns the disappearance of the public critic often “regarded as a parasite, strangely ineffectual in his inability to create art himself but inappropriately powerful in his capacity to ruin reputation with the stroke of a poison pen” (p. vii). Despite their low reputation, 19th century critics still maintained their role as “arbiter[s] for public taste and cultural consumption” (p. vii), “keepers of language and guardians of a tradition” (Day, 1993, p. 1). Starting from the last decades of the twentieth century, “the book club and the Booker judge, the bloggers and the pundits” have eventually swept the critic aside (McDonald, 2007, p. 2).

The retreat of the public critic into the closed circle of academia, where criticism has become “inward-looking and non-evaluative” (McDonald, 2007, p. 4), coupled with the democratization of criticism and the emergence of cultural studies, known for its skepticism about aesthetic judgment, have also contributed to the “devolution of critical authority” (McDonald, 2007, p. 4). However, for the Norwegian art critic Norton (2023), critics are not a victim of circumstance and, therefore, have no one to blame but “their collective aversion to risk” (Norton, 2023, “Intro.”). Refraining from doing the right thing—providing objective and aesthetic evaluations and interpretations, giving negative reviews or passing judgment—is thought to be caused by the critics’ fear of being publicly embarrassed or embarrassing. Social marginalization is, therefore, the price they have to pay for this evasive attitude. The merits of being genuinely critical are by far more rewarding: they are likely to invite reflection, fuel argumentative debates, and lead to a rich intellectual exchange of ideas that would certainly serve the interests of art, artists, and critics, as well.

In his ground-breaking work, *The Crisis in Criticism*, Cain (1984) depicts the chaos that English studies descended into; a discipline he judges lacking in “system, order, and coherence” (as cited in Pritchard, 1984, p. 637). The author identifies three reasons for the crisis, namely the boom in literary theory, lack of self-criticism—necessitating “acts of self-scrutiny” (Cain, 1984, as cited in Pritchard, 1984, p. 637)—and finally, the critics’ lack of commitment towards their society. Of particular significance is the insightful account of the crisis provided by Greif (2015) in *The Age of the Crisis of Man*. In his review of the work, Goble (2015) shares the writer’s main argument about the crisis, stipulating that lack of good criticism in the 21st century is caused by the critics’ neglect of the “crisis of Man,” .i.e., “what ‘Man’ is and ought to be” (para. 2). For both critic and writer, this is the kind of questions writers producing highbrow

literature, like Faulkner, Hemingway, Ellison, Bellow, and Pynchon are preoccupied with and that critics have to “translate...for the people” (Greif, 2015, as cited in Goble, 2015, para.6). As Goble concludes, for critics of the caliber of Mumford, Mannheim, and Arendt, “the rhetoric and consciousness of crisis” become “a sign of distinction, a form of capital itself” (para. 5).

2.3 Humanities under Siege

Since the last decades of the 20th century, the debate on the crisis in literary criticism has been relocated to the university; an institution that Readings (1996) declared is “in ruin.” How the crisis should be approached, who should define it, and what concrete challenges literary studies and the humanities, in general, are facing constitute the most pressing questions that have remained unaddressed. As Roche (2004) explains it, “one sign” (p. 10) of the crisis is that simple questions about the meaning of art, and the reasons for which we should read literature and profess literary criticism remain unanswered (pp. 3-10). Herlihy-Mera (2024) on the other hand, highlights the ethical aspect of the problem inside the academic community, where the crisis is defined by “academic stars” (para. 1), faculty whose voices are heard by virtue of their affiliation to prestigious universities, *not* by the marginalized “who are living the crisis and are ... defined by it” (Herlihy-Mera, 2024, “Questions of Memory” section). Yet, despite this “form of gatekeeping” (p. 7), the writer confirms that the silenced academics have been credited with “some of the best scholarship about the *crisis* in the humanities, literature and criticism” (“Questions of Memory” section).

Of similar and related importance is the ‘crisis’ teaching and studying literature and the humanities have been going through. Most (2015) has identified three challenges, namely the isolation of the “lone scholar” and skepticism about the “long-term project” in the humanities—a discipline whose economic efficiency is put under scrutiny (Most, pp. 602-603); the competition “national literature” is facing from “world literature” (605), and the printed book from the Internet and electronic devices (pp. 604-605). Some scholars have gone beyond the descriptive account of the crisis to suggest practical ways of countering it. Of significance is Ahlberg’s (2021) valuable work, *Teaching Literature in Times of Crisis*, in which she offers a different approach to the teaching of literature to students, who are currently going through a crisis of some kind, be it war, systemic racism or pandemics. As she argues, thinking of the classroom as a separate space from the students’ social environment is “a losing game” (as cited in Verdini, 2021, “Intro.” section), hence her recommendation that teachers engage with teaching practices that would highlight the relevance of literature in a world in flux. Ahlberg believes that literature teachers should empower students so as to “become actors” (as cited in Verdini, 2021, “Learning how to Engage” section), who can engage with crisis rather than be passive subjects to it; a target that cannot be achieved without engaging with narratives that provide ways out of the crisis.

Actually, belief in the empowering role of literature to uncover the underlying dynamics of crisis and to provide ways of coping with its harm was emphasized by critics like Auerbach, Bakhtin, and Zhong-Shu (Wang, 2019, p. 29). Their firsthand experience with war inspired their works and reflection on the crisis as an event that triggered “the decline of civilization and the distress of individual life” (Wang, 2019, p. 29). Understanding why and how these authors searched for solutions in literature was one of the aims of Wang’s work on these instances of “writing in sufferings” (p. 29).

Similarly, skimming through some Western universities’ websites shows that institutions like *University College Dublin (UCD)*, *Royal Holloway University of London (RHU)*, and *Universiteit Leiden (UL)* have integrated crisis and literature in their respective curricula. Online course descriptions show the universities’ equal emphasis on the “value, purpose,

usefulness, and joy of reading and writing literature” (Dillane, 2025, UCD); the teachers’ way of handling the crisis in literary criticism, which failed to address those simple questions. All courses foreground the power of literature as “intervention [and] consolation” (Dillane, 2025, UCD) as well as its agency to shape political and social experience, and to articulate and analyze critical events in the world (RHU, 2025). Differences between the offered courses are just a matter of focus and approach. Of significance is the way *Universiteit Leiden* showcases the social and literary impact of the current “polycrisis” and “permacrisis” (Kuznetski et al. 2024, pp.1-3) and how it generates “various forms of activism, protest cultures and literary or artistic attempts to rethink the future, devise alternative worldviews, and initiate emancipator change” (Boletsi & Lawtoo, 2025, “UL Prospectus” section). It is worth mentioning that the conception, design and teaching of this course could not have been possible without the boost in theoretical and intellectual writings on “literature in times of crises” (Ahlberg, 2021; Crosthwaite, 2011; deMan, 1967; Evans, 2021; Kovach et al, 2017; Mohd Don & DeRycker, 2013; Pellicer-Ortin et al., 2024). One also needs to highlight the fact that the upsurge in crisis studies has in turn been triggered by what has come to be known as “literature of crisis” (Alterio, 2016; Wright, 1984). This literary subgenre is different from “narratives of crisis ... [which] tell stories of ruin and renewal” in the aftermath of national disasters (Seeger & Sellnow, 2016, “Title page” section).

2.4 Literature of Crisis and Trauma

By “literature of crisis” or “crisis literature,” novelist Alterio (2016) means “trauma narratives,” a form of writing that flourished in the early 20th century, thematizing issues of loss and resilience (para. 3). As the totality of her visibly trauma-informed works of fiction demonstrates, Morrison seems to have taken the genre to the next level. This literary approach to human suffering has been provoked by what Ganteau and Onega (2017) referred to as the “visibility of the wound” (as cited in Pellicer-Ortin & Sarikaya-Sen, p. 2), coupled with a rising interest in the concept of crisis, particularly during the last two decades of the 20th and early 21st centuries when trauma theories grew into a theoretical paradigm framing literary studies (p. 2). Furthermore, “literature of crisis” is approached as a genre that has a form and life cycle of its own, inherited from tragedy, as Traschen (1969) explains below:

Before the modern period tragedy was the classic art form of crisis, notably in Attic Greece and Elizabethan-Jacobean England. It was a redemptive form, and so shaped by our archetype. This is evident in the tragic pattern, which may be divided into three phases: (1) the breakdown of orthodox values for the hero, (2) his descent into the abyss, marking the death of his old self, and (3) his transcendent confrontation of his fate, making for a transformation, a rebirth. (p.16)

This pattern parallels the intergenerational trauma cycle that Morrison’s protagonist, Bride, has managed to break to eventually resolve the Black identity crisis.

2.5 Trauma and Crisis: A Conceptual Dilemma

In *God Help the Child* (2015), Toni Morrison takes issue with the trauma of child abuse, provoked by “the predicament of being black” (Keita, 2018, pp. 3-44), which she approaches, both, as the cause and consequence of her protagonists’ identity crisis. Actually, researchers could not reach a consensus on the nature of the relationship between crisis and trauma, which many admit are closely related and thus perplexing (Dulmus & Hilarski, 2003; Sorenson, 2024). As these researchers explain, while crisis can evolve into trauma and vice-versa, both can also happen simultaneously; a fact that explains their use interchangeably (Corrado, 2020; Frank-Richter, 2018; Holland, 2024; Sorenson, 2024). Similarly, though Corrado (2020) believes that stress, crisis, and trauma exist on a continuum, with the potential of one developing into the

other to eventually culminate in “Allostatic Load” (“Defining terms” section)—the severest form of stress—he also confirms that many victims “experience a combination [of the first three] forms of distress simultaneously” (para. 8). To complicate the issue, some scholars think that the continuum starts with stress developing into trauma and trauma into crisis (Dulmus & Hilarski, 2003, pp. 27-28); they therefore stress the necessity of understanding the differences between the three concepts in order to assess them properly, act proactively, and provide efficient intervention methods. This viewpoint is shared by Frank-Richter (2018), who also thinks that trauma and crisis are “two very distinct experiences” (p. 1) that still overlap. Similarly, Holland (2024) points out that despite differences, crisis and trauma are “often interconnected” (para. 5), adding that a traumatic event can trigger a crisis and a crisis is likely to evolve into lasting trauma.

Furthermore, definitions of “crisis” and “trauma,” in terms of their respective symptoms and aftereffects, look so similar that distinguishing one concept from the other remains a challenging task. Both are depicted as being “sudden, unexpected, overwhelming event[s] that [are] out of the range of expected experiences” often leaving victims feeling out of control (Sorenson 2024, para. 2). Both have the potential to give rise to “significant human distress” and to erode the survivors’ “usual coping mechanisms” (Sorenson, 2024, para. 3); feelings of fear, anxiety, and helplessness are but some of the symptoms that ‘crisis’ and ‘trauma’ are likely to arouse in victims (Herman, 2015, p. 33). Pellicer-Ortin and Sarikaya-Sen (2021) depict the physical, psychic, and mental pain trauma, in particular—and certainly identity crisis—causes, as signaling “the demise of individual sovereignty” (p. 20).

Notwithstanding this conceptual complexity, the discussion will now proceed to an in-depth textual analysis of Morrison’s *healing model* through the double lens of ‘trauma’ and ‘crisis.’ Throughout the chapter, these terms will be used both interchangeably and in a nuanced way, in specific contexts. This exploration of loss of the “sovereign self” (p. 20) and the psychological and mental strain it takes to restore it, is premised on the following ideas about the meaning of trauma and crisis and the power of literature to resolve them.

By ‘psychological trauma,’ Erikson (1976) means “the blow to the psyche that breaks through one’s defenses so suddenly and with such brutal force that one cannot react to it effectively” (p.p. 53-54). This paper is particularly concerned with the “split in the ego” (Sklar, 2011, p. 11) caused by the wounds to the psyche and dignity of the Black in 21st century White America, and whom Morrison seeks to heal. Similarly, ‘crisis,’ defined as “the feeling of being uncertain about who” one is (Cambridge Dictionary Online, n. d.), is treated as the flipside of trauma; however, by recognizing crisis’ as “a time of decision-making, a turning point, or a moment of reckoning” (Cavaiole & Colford, 2006, as cited in Corrado, 2020, para. 5), the author invests in its potential to launch trauma victims on the path of recovery; the very idea that lies at the core of this study.

Of significance is also Morrison’s narrative approach to what Greif (2015) calls “the crisis of Man” (as cited in Goble 2015, “Title page” section) and how the healing model she proposes reifies the power of literature, highlights the potential of “the novel as crisis manager” (Vuletic, 2024, p. 239) as well as the possibility of “fighting real fires [child abuse and systemic racism] with fictional flames,” as Effe (2024) suggests (p. 131). Finally, by making the resolution of the problem an individual rather than institutional responsibility, Morrison articulates her belief in the importance of activating personal agency to handle internal conflicts and external challenges. This perspective does, to a certain degree, validate the theory of “self as method” proposed by Chinese scholars Xiang & Wu (2020/2023) in their co-authored book bearing the same title. For the authors, individuals in crisis can always start “by their ‘selves,’ individual lives and thinking brains” to navigate the system and improve not only their own conditions,

but those of their community, as well” (p. 18). As they depict it, “agency is always an exploration of the possible, and not a pie-in-the-sky search for escape or transcendence” (p. 17). What comes below is a literary translation of the validity of the advanced arguments to resolve the psychological trauma crisis, as envisioned by Morrison in *God Help the Child*.

To wrap up this section and link with the following one, this review of the literature has sought to highlight the different uses to which the conceptuality of ‘crisis’ has been put. Its deployment as a critical tool to gauge the quality of this art form in the current era, and warn against attempts to trample with its conventions should, however, never obscure the fact that crisis is, first and foremost, a “problem” whose avoidance, containment and resolution are always “desirable goals” as Mohd Don & DeRycher argue (2013, p. 3). As the same scholars further explain, “[i]ndecision, inaction or inertia, and generally letting the crisis “run its course” are seen as economically or politically costly [and] socially unjust” (p. 3). In *God Help the Child*, Morrison sheds the spotlight on a much more harmful impact, namely the toll trauma-induced crisis takes on its victims’ affective and mental wellbeing. One also needs to add that, although crisis discourse is laden with fears about the future of literature and literary criticism, it still bears the seeds of its own resolution; an approach that falls in line with Morrison’s own perception and fictional resolution of the trauma crisis, as will be shown in the following section. So what does it take to heal and reconnect with the lost self?

3. The Black Self in Crisis: The Resolution of the Trauma Crisis in *God Help the Child*⁵⁴

Despite the alleged crisis in literature and the ongoing controversy about its aesthetic or mimetic significance, canonized writers like Morrison are still considered “as the repository of narrative wisdom” (Grewal, 1998, p. ix), whose writings reify the “saving power of narrative, its capacity to open a door, to point out the fire and the fire escape” (Grewal, 1998, p. x). Premised on this belief in the power of literature and the author’s vision, the following discussion will proceed to a textual dissection of Morrison’s *healing model*; the main issue that lies at the core of this discussion, exclusively concerned with the resolution of the complex trauma crisis of child abuse and racial discrimination in 21st century America.

Unlike most of the characters in *God Help the Child* [henceforth “God”] who failed to cope with the wounds of blackness or whiteness, preferring instead to stay within their comfort zone—dwelling in victimization and putting all the blame on the oppressor—the very dark-skinned child Lula Ann / Bride has taken the high road and done the right thing: offer herself the “respect” that her abusers denied her. So what is her secret of success? In general, success is relative and immeasurable, for Bride has also had her share of failures due to ineffective coping strategies and inexperience. It is, however, by effecting a change in perspective and attitude towards stressors and oppressors that she has eventually managed to release herself from traumatic memories and abusive relationships. To counter the traumatic impact of her childhood adverse experiences, caused by toxic motherhood and a racist environment, upon her self-perception and psychological wellbeing, Bride has opted for full-frontal confrontation instead of escapism, problem- rather than emotion-focused coping, and self-compassion instead

⁵⁴The textual analysis section is extracted from chapter 5, “The return of “blackness” as trigger of crime and trauma in T. Morrison’s *God Help the Child*” of my doctoral thesis (Weslati, 2023, pp. 187-272), submitted in June 2023 and defended in September 2024, under the supervision of Literature Professor, Mohamed Mansouri, English Department, Faculty of Letters, Arts, and Humanities (FLAH), University of Manouba, Tunisia. For more details, check the References Page.

of self-pity (Allen & Leary, 2010; Lazarus & Folkman, 1984; McLeod, 2020; Neff, 2003; Skinner et al., 2003).

Psychological trauma management expert Herman (2002) states that recovery from the harmful effects of shocking events occurs in three stages: “the establishment of safety... remembrance and mourning... and reconnection with ordinary life” (para. 12). Psychologist Spicer (2016) has identified a fourth, called “posttraumatic [sic] growth” (“Stage Four” section). Morrison’s fictional, but still realist and trauma-informed, approach has highlighted the complexity of the healing process, which professionals in the field admit is far from being “linear” (Farnham, 2021, “Title page” section). What follows is, thus, an analytical account of the path Bride has walked to change “from one dimension into three—demanding, perceptive, [and] daring” (*God*, 2015, p. 73), as Booker, her lover, remarked. Of significance in this journey towards wholeness and freedom are the stages of the awakening, the constantly changing coping mechanisms, Bride’s fortuitous encounters with “tutors of resilience”⁵⁵ (Cyrulnik, 2011, as cited in *Optimista*, para. 5) as well as her special personal qualities, which have ultimately made the bridging of the “split in the ego” (Sklar, 2011, p. 11) and reconnection with the lost self attainable goals.

3.1 The Limits of Revenge

As Morrison depicts it, the journey has never been easy, though, as Bride keeps moving from negative to positive, pro-social and proactive coping strategies, “focused on self-care or changing the problem situation” (Bridges, 2011, p. 156). Identification with (Herman, 2015, pp. 81-82) the toxic mother was Lula Ann’s initial response to cruelty, which also denotes the child’s *denial* of the abuse inflicted upon her. As she admits, “Obedience [and] behaving [were the] only survival choice [she was] “good at” (*God*, 2015, p. 32). The “lie” or perjured testimony against Sofia Huxley, her white teacher, was meant to satisfy the mother, at any cost, and avoid her wrath and violence, another clear manifestation of this identification with the abusive mother. Flight or what Allen and Leary (2010) call “Escape-Avoidance” (p. 9) was her second defense mechanism against escalating violence. Like all victims of abuse, Bride was driven by a vengeful desire to succeed and become emotionally and financially independent from her abusive mother and condescending whites. She did this by “capitaliz[ing] on her dark skin, stressing it, glamorizing it” (*God*, p. 143). As she confesses,

[N]ot being a “nigger girl” was all I needed to win...I sold my elegant blackness to all those childhood ghosts and now they pay me for it. I have to say, forcing those tormentors—the real ones and others like them—to drool with envy when they see me is more than payback. It’s glory. (p. 57)

This is Bride’s perfected version of revenge—the first being the revenge plot against Sofia, a shameful act that made her live with constant guilt and regret. In her comparison of the two revengeful acts that mother and daughter committed, Liashuk (2020) dwells on what she refers to as “the symbolic revenge power [which for Lula Ann] means power to control a situation”

⁵⁵ For a thorough understanding of the concept of ‘resilience,’ check his book: Cyrulnik, B. (2011). *Resilience: How your inner strength can set you free from the past*. Tarcher. The French neuropsychiatrist portrayed by *The Times (London)* as the man who “has healed people, and countries” [as cited on the front cover of his book] explains that “tutors of resilience ... can be persons who look at you and interact with you like a human being, or people who give your life a semblance of normality, it could be loved ones, pets, plants, it could be habits, it can be nature, it can also be creativity” (*Optimista*, 2021). [See the References page for more on the last source].

(p. 27). Liashuk is clearly more appreciative of the daughter's approach to revenge to cope with all the wounds her mother, child molesters, and racist whites caused:

In the end, aspiration towards revenge in *Bride* seems to be secondary to the goal of asserting her identity as a person, visible and deserving to be loved, by becoming the center of attention, which has turned out to be an effective identity negotiating technique *Bride* has been using ever since then (p. 127).

Choosing the self and working on its betterment, instead of ruminating on the painful past, being fixated on cruel abusers who never feel remorseful, and suffering from a deep-seated victim complex, is what Liashuk seems to find most impressive about *Bride*. Furthermore, this healthy way of coping with traumatic pain stands in opposition to the emotion-focused approach that her mother, lover, and white teacher adopted to pay their perceived abusers back. Seeking revenge by engaging in ideated, desired, and actualized revenge plots was their response to humiliation, "loss of dignity" (*God*, p. 4), and injustice.

3.2 The Awakening

At this point, *Bride*'s investment in her "exotic beauty" (*God*, p. 79) and professional success have unfortunately proved insufficient to shield her from further humiliation and shame. Her re-traumatization by Booker's hurtful words, "You not the woman" before vanishing like a ghost" (p. 38) and her savage beating by Sofia, made her realize that the immunity she built up was not as tough as she imagined (p. 57). Nevertheless, the positive impact of these shocking events on the way *Bride* restructured her thinking mode to address the problem from a completely new perspective cannot be denied. The fact that these events operated as the second and third traumas that stirred painful childhood memories of the trauma of origin—caused by her mother's cruelty and whites' denigration—attests to the failure of this exclusively "materialistic" way of coping with childhood trauma. In other terms, the "personal glamour, control in an exciting even creative profession, sexual freedom" (p. 79) and emotional numbness proved to be mere distraction that helped "the ego...keep disturbing or threatening thoughts from becoming conscious;" psychologists identify this defense mechanism as "repression"(McLeod, 2024, "Repression" section).

Psychologists Allen & Leary (2010) maintain that *distraction* is a "passive coping strategy in that the person copes without directly confronting the situation or trying to solve the problem" (p. 6). It is in the immediate aftermath of this emotional abandonment and physical humiliation that the identity crisis sets in. *Bride* has just grasped the bitter truth, realizing that "there was nothing in the world left to do but stand up for herself finally and confront the first man she had bared herself to" (p. 79). Freud and other renowned psychoanalysts like Ferenczi (1912), Balint (1968), and Winnicott (1960) gave this sudden *awareness* that some trauma victims experience, special attention (Sklar, 2011, pp. 1-27), due to the potential it bears for healing. It is often the result of *regression* used for the treatment of severely traumatized individuals; the process starts by "going back in time in order to know more about present predicaments" (Sklar, 2011, p. 10).

As Ferenczi (1912) explains the concept, it is "through reliving an experience—in this case being abandoned by Booker that reminded *Bride* of her own father's early abandonment and battered by Sofia that stirred memories of her own mother's violence—that "repetition was transformed into remembering, leading to knowledge" (as cited in Sklar, 2011, pp. 10-11). Balint (1968) calls this awakening and understanding of one's condition the "new beginning," which Sklar interprets as "a way of taking the split in the ego seriously and attempting its closure" (p. 11).

It is through the shocking events that Bride continues to live through, her sudden awakening as to her sadness and decision to stand up for herself that Morrison explains this crucial stage in the healing process. As Brooks argues, experiencing awareness implies feeling the necessity of moving “forward in a meaningful way, chang[ing] [her] focus [and] then asking ...deep questions” (2017, para. 5), as Bride did. This is the first time Bride looks in the mirror to interrogate the kind of life she has so far led and confront the self, not others, by asking real questions:

What’s happening to me? My life is falling down. I’m sleeping with men whose names I don’t know and not remembering any of it. What’s going on? I’m young; I’m successful and pretty. Really pretty, so there! Sweetness. So why am I so miserable? (*God*, p. 53)

As Herman (2015) writes, “[w]hen the truth is finally recognized, survivors can begin their recovery” (p.1). In the above passage, cut for considerations of brevity, Bride appears engaged, probably for the first time in her life, in a direct confrontation with the wounded self, which in turn reveals a great deal about the radical changes in perspective and attitude towards her trauma. The realization that she has hit rock bottom and stooped so low—“sleeping with men whose names I don’t know and not remembering any of it” (*God*, p. 53)—has awakened her to the need to rescue herself and seek her own happiness and fulfillment in healthier ways. This way of coping with adversity is known as “self-compassion,” which according to Neff involves:

being open to and moved by one’s own suffering, experiencing feelings of caring and kindness toward oneself, taking an understanding, non-judgmental attitude toward one’s inadequacies and failures, and recognizing that one’s experience is part of the common human experience (as cited in Allen & Leary, 2010, p. 1).

It is through Bride’s struggles with recurring traumatic childhood memories and current stressful situations and toxic relationships that Morrison illustrates the concept of self-compassion and depicts its underlying dynamics in vivid terms. As soon as Bride has gained awareness of her sadness and misery, caused by her “helplessness in the presence of confounding cruelty” (*God*, p. 79), which even her success could not shield her from that she realizes the urgency of experimenting with more sophisticated and efficient defense mechanisms. The decision to ditch it all and embark on a physical and spiritual journey is stimulated by “self-love” / “self-compassion” (Allen & Leary, 2010; Neff, 2003). It is this revised approach to the self that marks Bride’s rebirth and unexpected prioritizing of the self, so evident in her never before uttered statement: “This is about me, not him. Me!” (*God*, p. 152). Bride’s uncommonly self-assertive attitude points to the fact that she has ceased to be “[t]oo weak, too scared to defy” (p. 79) her oppressors; that she has become, in the words of Booker, a “daring [and] demanding woman” (p. 173), “[d]etermined to discover what she was made of—cotton or steel” (p. 143), as she confidently declares.

3.3 The Physical Journey: Empowering Encounters with Tutors of Resilience

But, how has the journey helped Bride grow, acquire new coping strategies and take new decisions? What are the outcomes of embracing *self-compassion* as one of her last strategies to cope with trauma and defeat it? What follows is, therefore, an account of the journey—a water shed in both Morrison’s narrative and Bride’s life path—that the stoic protagonist sets out on, with “no retreat, no turning back” (p. 143). Most important are the changes in perspective and problem resolution that this search for identity has brought to the character of Bride. Her psychological growth and empowerment is achieved first, through the fortuitous *encounters* she made on her way to reconnect with Booker and her authentic self; and second, through the psychological process of “peeling back the layers of trauma” (Brooks, 2017; Childrey, 2014; Fourlas, 2017), achieved fictionally through Morrison’s recourse to *Magical Realism*. The

following analysis will take issue with these two distinctive features of the journey, which helped the protagonist evolve into a multi-dimensional woman. Her journey highlights the importance of “self-compassion,” “common humanity,” and “mindfulness” to cope with the shattering effects of psychological trauma (Allen & Leary, 2010; Neff, 2003).

“It’s not the journey. It’s the destiny” (R. W. Emerson) is a proverbial statement, which Morrison would share only partially and confidently change into, “*It’s* the journey. It’s the destiny” [emphasis added], to stress the importance of the lessons acquired all along the journey and the role they play in resolving as challenging a disorder as psychological trauma. As one of the most common metaphors in literature, the use of the journey motif in *God Help the Child* serves a specific purpose: to speed up the maturation process and bolster the protagonist’s psychological development, as characters in the Bildungsroman genre commonly do. The aim is clearly educational and meant to teach Bride, amongst other things, how to acquire self-confidence, empower herself and important others, and assume her own protection from future toxic relationships. With hindsight, Bride has often acknowledged her “weakness,” “cowardice,” and “helplessness in the presence of confounding cruelty” (*God*, p. 79) to eventually realize the necessity of standing for herself. So how has the journey helped Bride achieve those goals?

Each of the fortuitous encounters Bride has made during the *physical* journey “into unknown territory” (78) helps shed the spotlight on a specific aspect of *the wound*, which child abuse and racism caused. Actually, unlike her previous toxic relationships, mostly characterized by violence, neglect, abandonment, humiliation, and exploitation, her new encounters with “tutors of resilience” (Cyrulnik 2011, as cited in Optimista, 2021, para. 5)—who do not recognize themselves as such—have been valuable learning opportunities, necessary for her mental and psychological growth. In the first of those encounters, Bride “was stuck in a place so primitive it didn’t even have a radio” (*God*, p. 98), due to the car accident she had tracking Booker. Her six-week enforced rest at the white hippie couple’s house introduced her to a different breed of people, whose anti-capitalist mindset and universal values Bride finds “too hard, too strange to understand” (p. 90).

Here she was among people living the barest life, putting themselves out for her without hesitation, asking nothing in return. Yet, as was often the case, her gratitude and embarrassment were short-lived. ... They simply tended her, fed her, arranged for her car to be towed for repair. It was too hard, too strange for her to understand the kind of care they offered—free, without judgment or even a passing interest in who she was or where she was going (*God*, p. 90).

A reading between the lines of this passage and related details in the narrative is likely to reveal much about the unsaid, i.e., repressed feelings and memories of parental ill-treatment, neglect, and abandonment. For instance, while the hippie couple’s primitive life and disinterested treatment of their guest are clearly the focus of the passage, the reader can still feel the protagonist’s bitterness—or even jealousy—resulting from comparing her life to theirs. This might partially account for her inability to make sense of their evident happiness, despite what *she* thinks is a lack of money. This fact clearly contrasts with her sadness (p. 34) and feeling miserable, despite the comfortable and luxurious life she leads. As a city girl, steeped in a materialist and consumer culture, Bride cannot imagine that some Americans are, today, able to live without money, television, radio, washing machine, fridge, bathroom, electricity, and other modern amenities (pp. 91-92). While she equates “real life” with money and its lack with poverty, Steve, who is clearly irritated by her remark, has been quick to express his disapproval and remind her, in a sarcastic tone, that it was not money that got her “out of that Jaguar [or] saved [her] ass,” as he puts it (p. 91)! Yet, and as the narrator comments, “[w]hat did she know anyway about good for its own sake, or love without things?” (p. 92).

Leading one's life in a certain way can sometimes be a question of personal choice generated by a particular mindset, not always fate, as the hippies assert. Both, Steve and Evelyn, are college graduates who met while traveling to as diverse cultures as London, Berlin, Mexico, and India to finally decide to marry and settle in rural California, "to live a real life," as they call it (p. 91). Their traveling experience has illuminated them about the irrelevance of place and money to happiness. Shunning the values of their capitalist and materialist culture necessarily implies embracing other values like generosity, disinterestedness, "good for its own sake" (p. 92), gratitude for what one has, love, and living in harmony with Mother Nature. Under Bride's gaze, Evelyn embodies complacency, happiness, and peace of mind, which she reduces to:

[L]iving under stars with a perfect man ... housekeeping without modern amenities, which she called trash-ready junk since none of it lasted, [and the presence of Rain whom, she confesses,] had improved their lives" since her arrival. (*God*, p. 94)

By referring to Rain, the couple's *foster child*, in such affective tones has clearly tugged at Bride's heartstrings, stirring painful memories of her own *biological* mother's cruelty. Contrary to Sweetness, Evelyn embodies good motherhood whose essence has nothing to do with birthing or adopting a child. Bride is clearly envious of the maternal bond that ties the non-biological mother to the sexually abused child, whom the couple saved from a street life and provided with nurture and protection. Bride witnesses the mother-daughter complicity in sharing tasks and singing "some old hippie song, "This land is your land, this land is my land" (p. 87); an invocation of the Native Americans' perception of nature, land, and private property. In "We are the land," Booth (2003) dwells on the indigenous approach to land, not as a "place" or "means of survival," but rather as "a part of our being dynamic, significant, real. It is ourself" (p. 1). This provides further evidence of the couple's cultural openness to and embracement of universal values, in which racial, ethnic and other differences do not matter. As Evelyn explains to Rain, who asked why Bride's skin is "so black," the mother replied, without hesitation, "For the same reason yours is so white" (*God*, p. 85), Evelyn's explanation reflects a pragmatic and mature mind that does not question the given, or what man has no control over! It is no wonder that Bride should exclaim in disbelief: "Who are these people ... and where did they come from?" (p. 90), to express her amazement coupled with her inability to make sense of the hippie couple's worldview.

Although Bride is fully aware and appreciative of the couple's generosity, which she finds uncommon and incomprehensible, she is still incapable of showing any feelings, be it "sympathy," which "she knew nothing about" (p. 146), "embarrassment," or "gratitude," which she admits are often "short-lived" (p. 90). In psychology, this defense mechanism is known as *emotional numbness* (Herman, 2015, p. 151), the pathological legacy of childhood abuse, racial trauma, and toxic relationships; it is also a recurring theme that Bride stresses each time her emotions are involved. For Bride—just like her "exotic beauty" (*God*, p. 144), sexual freedom, professional success, and drugs—emotional numbness operates as a second skin, "a shield that protected her from any overly intense feeling, be it rage, embarrassment or love" (p. 79). Later in the narrative, she experienced similar embarrassment, when she "fought against the danger of tears for anyone other than herself" (p. 103), while listening to Rain's testimony about her sexual trauma and "homeless life" (p. 103). This pathological coping with trauma will lead the discussion towards the second of Bride's encounters.

Rain or Raisin is the child Bride crosses paths with on her way towards maturity and healing. As one of the most heart-wrenching abusive experiences a child can endure, Rain's trauma is still a hard learning experience for both speaker and listener. Her story has played an equally significant part in the empowerment of Bride into *two* significant ways. First, Bride is struck

by the toughness of the “little girl who wasted no time on self-pity” (p. 103). By this, she means the courage Rain shows navigating the dangerous world of street life, unaided but by inner strength and determination to survive. Her struggles to ensure her physical safety and basic needs—food, shelter—as well as efforts not to be caught by the police or fall prey to “drunks, dope heads” (p. 103) have left Bride speechless.

That a six-year old child goes through all this, without sinking into the underworld of delinquency and criminality is in itself mind-blowing for the common people; it also goes against the well-established correlation in criminological and trauma studies between childhood abuse and criminality (Minh et al., 2013; National Institute of Justice, 2017); more important still, it provides further evidence that children should never be underestimated. Actually, Rain’s coping with such extreme circumstances reveals a kind of stoicism, whose adherents have a particularly rational and cool attitude to adversity: embracing it as an inescapable fate. Nietzsche refers to the concept as *Amor Fati*, meaning the ability to love and embrace one’s own fate (Itani, 2020); he also recognizes it as the “formula for greatness in a human being” (as cited in Weaver, 2019, “The Origins of Amor Fati”).

Apart from being deeply affected by the traumatizing life story of Rain whose mother heartlessly threw out of home (*God*, p. 101), Bride has felt a strong identification with the suffering of another daughter at the hands of another ‘bad’ mother, though with a difference: “Even Sweetness, who for years couldn’t bear to look at or touch her, never threw her out” (p. 101). What Bride finds really shocking, apart from the indescribable sexual abuse Rain went through, is the cold reaction of the mother to her daughter’s misbehavior with her client—apologizing to the sexually abusive client, giving him his money back, making Rain stand outside, not letting her back, and finally throwing her a sweater before shutting the door. For Bride, Rain’s trauma is another eye-opening experience about the relativity of traumatic pain and “common humanity” (Neff, p. 89).

According to Allen & Leary (2010), “common humanity” is a key feature of self-compassion, which “involves recognizing that one’s experiences, no matter how painful, are part of the common human experience” (p. 2). Here lies the second advantage of this encounter, which in light of Rain’s moving confessions, has yielded a change in Bride’s attitude towards her own trauma and toxic mother. As Bride has come to realize, Sweetness had not gone so far, after all; that she “is not alone in the experience,” that there is nothing “personal” or “unique” (p. 2) about what she experienced; and that it would be better to *transcend* her pain to live in peace. Once she could drive, Bride took to the road again to resume the search for Booker; this being clearly the immediate consequence of this new understanding of the relativity of pain and the need to go forward on the path of recovery. However, reconnecting with her man would not occur before making the third of her equally transformative encounters, namely that with his aunt, Queen. This part of the discussion will be postponed, for the moment, to make room to an equally enriching aspect of the journey, whose relevance to the healing process is of the utmost importance.

3.4 The Journey Within

In parallel to the *physical* journey, Bride has also been led to undertake a journey *within*. As Morrison holds in one of her interviews about *God Help the Child*, living “an interior life” is necessary for Bride and Booker to “get beyond” their childhood traumas (Griffin, 2020, para. 3). Actually, the author is not alone in this approach to self-discovery as the best guarantee of personal growth; many have often called for what look inside the heart (Van Sambeek, 2014) or a deep dive into what Maté calls the “authentic” or “genuine” self (Warner Mathisen, 2019, para. 11). Poet R. M. Rilke (1875-1926) also insists on introspection and self-discovery by

asserting that “the *only* journey is the journey within” [emphasis added] as cited in Nawaz, 2023, “Title Page” section). In psychology, this is known as *regression*:

[A] defense mechanism, whereby the ego reverts to an earlier stage of development usually in response to stressful situations. ... [It] functions as a form of retreat, enabling a person to psychologically go back in time to a period when the person felt safer. (McLeod, 2020, “Regression”)

As Bride experiences it, the psychological movement back in time is still meant to flee a stressful present that is constantly invaded by recurring memories of past abuse, and which the victim could not put to rest. However, the aim of “regression,” here, is not to take refuge in the past to *relax* or *recharge*, but to revisit the painful past in order to *confront* it, as Freud, Ferenczi, Balint and Winnicott postulated (as cited in Sklar, 2011, pp. 1-27). In other terms, the purpose of this retreat to childhood is to help the victim stop fleeing the past, because as a coping mechanism, *flight* has proved its failure to ward off the ghosts of childhood trauma. Fleeing the trauma of origin implies accumulation of additional layers of trauma, which would alienate the survivor, even further, from the real self, hence the confusion and uncertainty about who one is really—the essence of the identity crisis. Brooks (2017) explains the build-up of trauma over years and the consequent “split of the ego” in the following terms:

Child abuse is sustained trauma that happens day after day. It forces you to disconnect from your mind, body, and heart. This helps you survive the abuse, but it also hides your authentic self. (para. 2)

Only a *reversal* of this process through the gradual “peeling away” of accumulated layers of “repression, inner tension, and toxic beliefs” (para. 3) can release the victim from the grip of traumatizing memories and help rediscover the self. Magical Realism is Morrison’s technique to make a point about the mental and psychological reality of trauma. According to Strecher (1999), Magical Realism denotes “what happens when a highly detailed, realistic setting is invaded by something too strange to believe” (p. 267). In *God*, the magical element materializes through the incomprehensible “shrinking” of the body (*God*, 2015, p. 93) that no other protagonist but Bride noticed (p. 95). This weaving of the magical into the realist is Morrison’s attempt to depict a complex psychological work, whose purpose is to make the *most crucial* of encounters possible. As Morrison figures it out, the envisioned face-to-face confrontation between Lula Ann, “the ugly, too-black little girl in her mother’s house” (p. 144) and the 23-year-old anxious Bride occurs, when the latter is gradually stripped of her feminine attributes—“spectacular breasts” (p. 95), underarm and pubic hair, pierced ears, stable weight, and menstrual period (p. 97). By shedding the spotlight on these changes, Morrison allows the reader to grasp the psychological and mental process of *regression* into childhood so that Bride faces what she fears most: the trauma of origin, which has since stood between her and a life of contentment and peace.

As a survivor of trauma puts it, “the work” that peeling back the layers of trauma involves is “exhausting, cathartic, scary, [and] liberating” (Farnham, 2021, “In the face of all odds” section); a description that corresponds to what Bride felt during her scary journey towards healing. Actually, the fear, malaise, and mental confusion are felt the very moment Bride has decided to chase Booker to understand why he left her and what made him judge her as less than a woman:

I’m scared. Something bad is happening to me. I feel like I’m melting away. I can’t explain it to you but I do know when it started. It began after he said, “You not the woman I want.” (*God*, p. 8)

Fear of the encounter with the real self, which would lift the lid off “things discarded, killed, and buried” (Sklar, 2011, p. 2), seems to increase with each new physical disappearance Bride discovers. Suspecting that the gradual physical transformations are paving the way for the encounter with Lula Ann, Bride wished she could “have run, rocketed away from the scary suspicion that she was changing back into a little black girl” (*God*, p. 97). Besides being terrorized by the encounter, Bride had doubts about the changes to the body, wondering if “all of this might be a hallucination” (p. 97). She even thought she “must be sick, dying” (p. 93), or even “cursed” (p. 95) when “she discovered that her chest was flat” (p. 92).

Of similar significance are the terms she uses to describe the emotional state she was in, due to what she “believed was her crazed transformation back into a scared little black girl” (p. 142). Feelings of shock, panic, and terror (pp. 92-93), characteristic symptoms of the trauma syndrome, point to one reality: that release from the grip of trauma is as traumatizing as experiencing it for the first time! Furthermore, each time Bride falls prey to such destabilizing emotions, she tries to fight her panic, “to quiet the terror, collect her thoughts and figure out what was happening to her shrinking body” (p. 93) to finally understand “that the body changes began not simply after he left, but because he left” (pp. 93-4), hence the decision to chase Booker. “Awareness” is the major outcome of this peeling away of layers of trauma, which “prevent people from being their authentic selves and from living in contentment and abundance” (Furlas, 2017, “Living in contentment” section). The analogy Brooks (2017) makes between peeling the layers of an onion and trauma, the pain this entails, and the ensuing awareness is worth citing in full:

However, peeling an onion makes you cry, right? Awareness does the same thing. When awareness appears, it immediately peels away a layer of repressed trauma. That releases a flood of emotion, like sadness, grief, anger, or rage. You have to grab a tissue to blot your eyes when peeling an onion, right? Do the same with awareness. Use kind and compassion, like a soothing tissue, until those emotions flow through you and out. Keep answering these deep questions, gaining awareness, and peeling away each layer of repressed trauma (2017, para. 7-9).

That “Awareness is the greatest agent for change” (Tolle, 2005, as cited in “goodreads.com”) is a fact that rings true for Bride. Enlightened by the lessons and values acquired during the last two encounters, the protagonist has grown even more conscious of the “unrelenting need to confront” Booker (*God*, p. 100), for her own sake. Despite failed attempts to forget the disturbing body changes, Bride was determined to pursue the journey that led her to the third of her encounters, this time with Queen Olive, Booker’s aunt, who helped catapult her even further on the path of healing.

3.5 Back to Roots: Reconnecting with the “Motherline”

As a woman, who “had been through it all,” Queen is now taking refuge in “forgetfulness [and] wisdom” to cope with her solitary life in the wilderness (p. 159). Notwithstanding her failings as a mother whose “smarts,” she admits, “came too late for her children” (p. 158), her mature take on a host of life issues has been highly instructive for Bride. By listening to Queen’s confessions about the way she led her life, Bride has come to realize the faultiness of many of her established convictions as well as the need to rectify them. As a woman who “had counted on her looks for so long” (p. 151), Bride has, for instance, understood the *ephemeral* nature of beauty, “its shallowness or her own cowardice” (p. 151). Being once “pretty” and believing “it was enough” (p. 158) had clearly destabilized Queen, who ended up alone with none of her multiple husbands or children around, when she was on her deathbed. For Morrison, beauty “can destabilize you if that’s all you have and that’s all you care about and that’s where your success comes from” (as cited in Hoby, 2015, para. 4); the truth that Queen has come to realize,

though too late, when she explains to Bride that one cannot be “a real person [unless one is] a thinking being” (p. 158). As the unfolding events of the narrative will show, Bride’s growth into a three-dimensional woman is clear evidence of her investment in this piece of wisdom that Queen bestowed upon her.

Feeling saddened by the anger and exchange of violence between the lovers during the “dustup” (p. 154), Queen lectured them on the necessity of *releasing* the dead—in the case of Booker—and *forgetting* the wounds of their childhood traumas. *Love* is what they should nurture, instead! Having lived through seven marriages has taught her how “hard... selfish [and] easily sundered” love is (p. 154). It is for this reason that Queen is almost certain they “will blow it ” if “[e]ach will cling to a sad little story of hurt and sorrow—some long ago trouble and pain life dumped on their pure and innocent selves” (p.158). That would be a “waste” of their ephemeral youthfulness and that “fortune-cookie love, [which will soon become] pure adult stupidity” (p. 158), as she perfectly knows.

Of equal importance is the part Queen played by *acting motherly* when Bride, during a moment of hesitation and confusion, contemplated fleeing the confrontation with Booker. Like a good and affectionate mother, Queen has firmly stood against Bride’s decision to “run around and leave” (p. 152), urging her instead to go and face him. By thus mentoring Bride, who is after all a stranger whom she has just met for the first time in her life, Queen performs the African American tradition of “othermothering,” or “community mothering” (O’Reilly, 2004, p. 11). By “othermothers,” Morrison means “women who assist bloodmothers by sharing mothering responsibilities” (as cited in Ramirez, 2015, p. 109). As is often the case in her fiction, and *God* is no exception, “Morrison does not restrict maternity to its biological aspect. Surrogate mothers may even have a closer relationship with children than their birth mothers” (Ramirez, 2015, p. 109).

As O’Reilly (2004) further explains, the non-biological mothering roles that some African American women assume in the Black family and community constitute “strategies of survival,” targeting the Black child’s psychological and physical well-being and empowerment (as cited in Ramirez, 2015, p. 109). In the narrative under exploration, Queen plays this role, not only with Bride but also with Booker, whom she accompanied in his grief over the loss of his brother Adam, during their childhood. Nevertheless, Queen is not alone in fostering children whose biological mothers have acted unmotherly; Evelyn, too, has engaged naturally and voluntarily in othermothering Rain. By thus approaching motherhood, Morrison reveals her embracement of and contribution to the *post-racial* discourse, which some still *rightly* deny, but that the author of *God* seems to advocate as the *right* antidote to the racial problem in the USA.

Being empowered by Queen’s wisdom and “ancestral knowledge” (Ford, 2020, p. 102), self-compassion, firstly, and love for the man who had once made her feel “curried, safe, owned” (*God*, p. 56), secondly, Bride summoned her courage and headed towards Booker’s trailer to confront him. It is during this violent encounter that the reader discovers the *new* Bride—assertive, daring, demanding and communicative—the living proof that Queen’s lessons and those acquired from previous encounters, have ultimately paid off. Her emotional, verbal, and even physical brutality was unexpected and uncontrollable; a blowout caused by layers of repressed anger, frustration, and helplessness that also reminds the reader of the way Sofia reacted the very moment she recognized her oppressor, the *liar* that Lula Ann was. In this episode, Bride is almost unrecognizable: she was “screaming...shutting up” Booker, calling him a “bastard,” and when he knocked her down, in retaliation, she broke a beer bottle over his head that left him motionless and bleeding (pp. 152-154). “Respect [not] love” (p. 154) is what the wounded woman wanted, insisting on her right to know why he “dumped [and] left [her]

without a word” (p. 146). In so reacting, Bride was determined to shed the past when all her mother cared about was teaching her “how to behave, how to keep her head down and not to make trouble” (p. 7). By thus standing up for herself, the young protagonist has “deleted ... in one stroke” (144) a whole set of flawed defense mechanisms—obedience, behaving, not fighting back—to cope with any type of injustice and humiliation she might face.

Much more significant are the *psychosomatic* signs of healing, which Bride confesses having felt in the aftermath of this “dustup” (p. 155). “[E]xhausted after screaming and trying her best to kill him or at minimum beat him up” (p. 160), Bride went into a deep sleep—minus the nightmares—from which she woke up feeling rejuvenated and relieved from the backbreaking weight of painful past memories:

Bride woke in sunshine from a dreamless sleep—deeper than drunkenness, deeper than any she had known. Now having slept so many hours she felt more than rested and free of tension; she felt strong. She didn’t get up right away; instead she remained in Booker’s bed, eyes closed, enjoying a fresh vitality and blazing clarity. Having confessed Lula Ann’s sins she felt newly born. No longer forced to relive, no, outlive the disdain of her mother and the abandonment of her father. (pp. 161-62)

Having been *mothered* by Queen has undoubtedly been empowering for Bride, whose gain in self-confidence and self-compassion has helped her relative recovery from psychological trauma. However, *mothering* Queen, has also been as healing and empowering for Bride, for as Morrison comments, “only caring unselfishly for someone else would accomplish true maturity” (as cited in Ford, 2020, p. 103). By this, the writer refers to the way Bride and Booker cooperated to *mother* Queen, who was seriously injured during the fire that caught to her house and body (*God*, 2015, p. 169). During Queen’s stay in hospital, Booker and Bride spent days and nights working “together like a true couple, thinking not of themselves, but of helping somebody else” (p. 167), which proved to be a healing experience for both victims of childhood trauma. While Bride assumed daycare which she “did herself as tenderly as possible” (p. 166), cleansing and bathing Queen who “had to be scoured, oiled and rewrapped” (p. 166), Booker did the night care. He insisted “on the duty of assuming that act of devotion”: pedicuring, soaping, rinsing, and massaging Queen’s feet (p. 167).

For Bride, the experience was new, as never before had she cared for anyone other than herself! As Ford (2020) comments, “Bride discovers herself while being cared for by Booker and Queen and when she and Booker are caring for queen” (p. 103). This identification with *the other’s* pain and commitment to its alleviation attest to the actual *dissipation* of Bride’s emotional numbness; it does also reveal how far she has progressed in her journey towards self-discovery, the one and only path leading to true healing. Besides “othermothering” Bride, an act that helped heal the wound her biological mother’s cruelty inflicted upon her psyche, Queen has also provided Bride with the opportunity to grow and mature even further, as Morrison explains: “[i]t is only when they were in position and have agreed to really help somebody else, whom they like, together, that they can grow. It’s not about them (as cited in Griffin, 2020, para. 3).

3.6 Rewards and Recovery

At this juncture of the discussion, one cannot disregard the *rewards* that Bride started receiving, almost miraculously, after tending to Queen and performing those acts of “devotion” and “comfort”—the ablutions—(*God*, p. 167) towards the matriarch. It was at the beginning of her journey that Bride realized that the alterations to her body started not *after* but *because* of Booker’s sudden disappearance (pp. 93-4). Similarly, their return occurred not *after* but *because* of the fire accident and the opportunity that Queen, unwittingly, offered the protagonist to do

good for its own sake, and thus win her salvation. Nothing seems to compare to the “delight [and] glee” (p. 166), which overwhelmed Bride when she sensed the return of her “plump breasts” (p. 166) and earlobes’ “tiny holes” (p. 169)! The sudden disappearance and return of the lost parts of her body testifies to the successful completion of the healing cycle Bride has embarked on.

The second reward consists of “gold earrings,” which Queen “prized ... and would want [Bride] to wear them while she recovers” (p. 169), as Booker informed her. Unlike Sweetness who offered Lula Ann pearl earrings as a reward for the lie she told against Sofia, Queen offered Bride her own gold earrings in gratitude for her devotion to the well-being of a stranger. Similarly, Bride’s pregnancy, which explains the lack of her menstrual period, is the well-timed reward that helped soothe the “unbearable loneliness as well as profound regret” (p. 174) Booker felt in the aftermath of Queen’s death. More valuable is the part the pregnancy news played in cementing the relationship between the lovers, as Booker “offered her the hand she had craved all her life, the hand that did not need a lie to deserve it” (p. 175). How can Booker not “prize” the woman who “changed from one dimension into three—demanding, perceptive, daring” (p. 173)? As Morrison’s protagonist teaches us, defeating one’s fears, anxiety and failings is undeniably the best of revenges and rewards!

By the closing pages of *God*, Bride has given further evidence of the higher level of maturity she has finally attained: that *recovery* from trauma involves having a clear sense of direction as where one can go from now and here; also a clear manifestation of self-confidence and assertiveness that also attests to the *resolution* of the *identity crisis*. Indeed, early in the narrative, when Bride was in the middle of her confusion and still an easy prey to predators of all types—abusive mother, exploitative sexual partners, an opportunistic friend, and racist whites—she confessed to Booker her lack of vision and incapacity to take decisions, in the following terms: “I don’t always know what to correct” (p. 56). By the end of her journey, however, Bride emerges as a mature woman who perfectly *knows* what she wants and what to do to get it. The ability to take enlightened decisions about the future of her not yet born child and the kind of relationships she deems important for their well-being attests to the clarity of her mind, no longer blurred by traumatic memories.

“Mindfulness,” “forgiveness,” and “proactive coping” are Bride’s ultimate defense mechanisms to knock trauma down. By “mindfulness,” Allen & Leary (2010) mean “taking a balanced perspective of one’s situation so that one is not carried away with emotion” (p. 2). To spare her child the pain she herself went through, Bride decides to reconnect with her own mother, sending a short note to inform her about the pregnancy. This act of “forgiveness” might have been triggered by the void left by Queen’s death, which aborted their plan of living together (p. 171) as family. More certain, however, is the way this decision demonstrates the protagonist’s “willingness to abandon [her] right to resentment, negative judgment and indifferent behavior toward” [Sweetness] “who unjustly hurt [her]” (Enright and Rique, 1998, as cited in Lijo, 2018, p. 2). By opting for transcendence, i.e., putting aside her emotions and fostering, instead, “the undeserved qualities of compassion, generosity, and even love toward” (p. 2) the abusive mother, Bride prioritizes the interests of her future child, whom she wants connected to the “motherline.” The concept refers to “the ancient knowledge of women transmitted by female oral tradition” (Ramirez, 2015, p. 110) and which was disrupted in the family, due to the severing of maternal ties between successive generations of mothers that “blackness” has caused.

In psychology, this is known as “proactive” defense mechanisms, also defined as “preventative” or “anticipatory” (Allen & Leary, 2010, p. 8) ways of coping with stress. Acting “proactively” often “involves making an effort to prepare for stressful events that could [arise]

in the future” (p. 8). To shield her future child from parental and racist abuse, Bride invests in what she both deems necessary for the healthy development and empowerment of the child and what she had missed most as a child: a family with a present father, a loving and caring mother, and a grandmother who would assume the task of “othermothering.” However, as Bride figures it out, the future child is not the only target of this “preventative” coping with possible abuse and neglect. As a wounded child/woman who has been up to the challenge of trauma, Bride has grown aware of the need to shield herself, as well, from the pain of future adversity and disappointment. It is true that Bride “probably knows more about love than [Booker, who knows that]... she’s willing to figure it out, do something, risk something and take its measure” (*God*, p. 160). It is also true that she loves Booker, “the one person she once trusted, who made her feel safe, colonized somehow” (p. 78). Nevertheless, Bride cannot ignore the fact that Booker is “a leaver” (p. 146), as Queen once told her, for she knows that, under stressful circumstances, he can run away without fighting as he did with her and his own family! What now counts most for Bride is the certainty that even if Booker leaves her again, “it would be ok,” as she says. “She didn’t want to be without him, ever, but if she had to she was certain it would be ok. The Future? She would handle it” (p. 173).

Empowered by this newly acquired way of thinking, in which self-compassion, mindfulness, and proactive coping occupy a central position, Bride has come to understand that adversity is a blessing in disguise. In the eyes of Queen and Booker, childhood trauma has helped her grow into “a thinking” being (p. 158) and a three-dimension woman (p. 173). Nevertheless, the most important of all perceptions remains one’s own, as Bride now knows, without proclaiming it loudly and clearly, that she is indeed made of “steel” rather than “cotton” (p. 143).

4. Conclusion

This study set out to explore ways of managing the *trauma crisis*, Morrison’s way of handling the intertwined concepts of ‘psychological trauma’ and ‘identity crisis,’ in her last narrative *God Help the Child* (2015). Despite Morrison’s intentional glossing over of the unique characteristics of each concept, the present study has, nevertheless, attempted to strike a balance between the first section of the chapter, in which discussion centered on assessing the crisis in literature and the second, focused on the resolution of the trauma crisis in *God Help the Child*.

God Help the Child is clearly a text whose author wanted recapitulative, i.e., a kind of reminder of the horrors of slavery and its dehumanizing impact on the psychological health of generations of Blacks. Yet, for Morrison, ruminating over past memories, falling prey to the victim complex, and blaming abusers of all types while expecting closure have proved their deficiency as responses to trauma. Nor could those emotion-focused mechanisms effect a change in the status quo or reverse the history of slavery. The *healing model* Morrison proposes to close wounds to the dignity of the Black self, and thus bridge the “split in the ego,” reveals her outright rejection of this defeatist attitude towards injustice. Her workable enforceable blueprint can be considered a literary form of trauma-informed crisis intervention, offering a dose of hope for trauma victims, crashed by despair over their liberation from the grip of psychological trauma.

By highlighting the unique case of Bride and the unconventional path she has followed to disentangle herself from the trauma trap, Morrison articulates her belief in the possibility of resolving the trauma crisis. Bride’s spectacular success is achieved the hard way, i.e., through a forced change in perspective and attitude towards the self, others, and the world. Awareness of who she really is and wants to be marks the onset of the identity crisis. However, by not seeking revenge against her abusers, embracing the unique experiences of her “tutors of

resilience,” and opting for transcendence, i.e., forgiving and reconnecting with her abusive mother and man have proven liberating. Of equal significance is the way she engages with proactive coping mechanisms, takes important decisions to shield her child from future adversity, and adopts her imperfect mother and man to satisfy that long craved sense of family; radical changes that attest to her healthy recovery. Actually, this palpable eagerness to bond with significant others, unmistakable clarity of mind, and eventual realization that she is made of “steel not cotton” clearly contrast with her initial mental confusion and emotional numbness and bear witness to the successful resolution of identity crisis.

For a better effect, this study could have examined the factors that have blocked healing for the greatest majority of Morrison’s characters, transfixed by the horrors of their traumatic experiences; an approach that does mirror the reality of trauma outside the confines of the novel. Recognizing the potential pitfalls of a reactive and emotionally-driven coping with violence would certainly help victims circumvent their entrapment in the web of trauma. Injustice and accountability are often nagging issues in the context of trauma; an equally missing subject that needs to be addressed, particularly in a context where abusers often get away with their crimes against children, due to their occurrence behind closed door.

Indeed, ‘concealment’ is the issue towards which researchers need to redirect their investigative mind to dig deeper into the nature of *evil*. Other forms of psychological trauma are equally provoked by such *hidden*, uncontrollable, and extremely destructive emotions as jealousy, envy, hate, and random evil. The havoc offenders—often haters, psychopaths, sociopaths, or covert narcissists struggling with bipolar and other mental disorders—can wreak in the life of their families and relationships is indescribable and can lead to “psychological murder” (Hubs, 2022, “Title page”). Inaction, indifference, and silence always lead to the “triumph of evil,” as Ethiopian Statesman Haile Selassie I commented in his legendary Addis Ababa Speech “1963, Towards African Unity” (as cited in good reads. com). Most importantly, they are likely to pose the risk of humanity regressing into “a state of lycanthropy... the possibility that human beings overwhelmed by passion might turn into beasts” (Rossello, 2010, pp. 1-3)!

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Crisis and Creation: Linguistic Innovation, Dark Fantasy and the Construction of Possible Worlds in Joe Abercrombie's *The Blade Itself*

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Abstract

Dark fantasy confronts a fundamental linguistic crisis: standard language inadequacy to express the complex moral ambiguities, psychological depths, and dystopian realities that define the genre. This study examines how Abercrombie addresses this representation crisis in *The Blade Itself* through systematic linguistic innovation and neological creativity. The research investigates the crisis at multiple interconnected levels: the semantic crisis of conventional fantasy discourse that fails to capture dark fantasy's moral complexity; the expressive crisis of standard English vocabulary when confronting concepts beyond traditional literary boundaries; and the cultural crisis of bridging fictional worlds with contemporary reality. Abercrombie's response to these crises involves creating an extensive neologisms' corpus that not only constructs his dark possible world but challenges conventional discourse limitations. Through comprehensive linguistic analysis, this study creates and analyzes the neologisms' corpus from *The Blade Itself*, employing context analysis, word-formation analysis, etymological examination, and linguo-cultural investigation. The research reveals how Abercrombie deploys lexical units with predominantly negative connotations to construct a possible world reflecting dark fantasy's bleakness and moral ambiguity. The analysis identifies semantic derivation, particularly metaphoric transfer, and compounding as the most productive strategies applied by the author. The findings demonstrate that Abercrombie's innovations serve dual purposes: creating authentic-feeling cultures, traditions, and societies within his possible world, while simultaneously addressing standard English expressive limitations when depicting complex dark fantasy concepts. His linguistic strategies include the creation of proper names, geographical designations, cultural ranks, and conceptual terminology that collectively establish a coherent possible world. This study contributes to understanding how dark fantasy literature navigates the crisis between linguistic limitation and creative necessity, revealing neologisms as a tool for expanding the expressive capacity of language in speculative fiction. The research illuminates how authors construct worlds transcending conventional discourse boundaries, offering new pathways for representing complex human experiences that standard language cannot adequately capture.

Keywords: crisis of representation, dark fantasy, possible world, neologism, lexical creation, semantic derivation, compounding

1. Introduction

In the modern age where the boundaries between imagination and reality have become increasingly blurred, dark fantasy and its numerous masterpieces emerge as a specific lens through which it is possible to examine the epistemological certainty of contemporary crisis in its various perspectives. As traditional bases of meaning, including religious doctrines, scientific rationalism, society, as well as social consensus, continue eroding under the impact of technological disruption, advances and postmodern skepticism, readers focus on narratives that not only acknowledge this uncertainty but also actively explore its most disturbing features and implications. It is evident that dark fantasy, with its original reality subversion and vision, as well as its unflinching examination of people's darkest sides, offers a unique framework for understanding how verbal narrative constructs possible worlds that both challenge and reflect our comprehension of humankind existence.

The concept of possible worlds was first introduced in philosophy and modal logic by Gottfried Wilhelm Leibniz (Brown & Fox, 2006), Saul Kripke (1963; 1990) and David Lewis (1978). Later, such theorists in the field of literary studies as Lubomir Doležal (1995; 1998), Thomas Pavel (1986), Ruth Ronen (1994) and Marie-Laure Ryan (1991) adapted this concept and suggested an essential theoretical foundation for examining how dark fantasy fiction functions as more than mere escapist fiction. It is worth noting that unlike traditional fantasy, which usually presents alternative realities as refuges from the complex real world, dark fantasy authors construct possible worlds that function as realms where even the nature of reality becomes subject to a wide question range. These dark fantasy masterpieces do not just offer alternative existence versions; they present realities where the basic considerations of ethics, truth, meaning and rationality that govern our world are constantly reconstructed in accordance with unique, often disturbing and logical frameworks.

The dark fantasy possible worlds' verbal construction reveals the medium's unique power to manipulate readers' perception by means of language, specifically new lexical units. It is obvious that dark fantasy authors focus on the readers' imagination to fill in the gap between the horrific and familiar issues. This collaborative world-building process through language often creates an original form of cognitive dissonance. On the one hand, readers have to actively participate in constructing possible worlds that can significantly challenge their view and understanding of the world. On the other hand, the text becomes a space where the boundaries between the narratives' possible worlds and the readers' reality, as well as their knowledge of this reality, blur. Thus, it is possible to observe a phenomenon that could be referred to as a "*crisis of reality*". The following reality crisis often extends beyond the possible worlds' confines.

Contemporary dark fantasy writers, including Joe Abercrombie, Clive Barker, Suzanne Collins, China Miéville, Caitlín R. Kiernan, Steven King, Patrick Rothfuss, Brandon Sanders, Charles Stross and many others, exemplify this phenomenon through their creation of possible worlds that usually operate following externally bizarre, alien and internally consistent logics. Their narratives introduce possible worlds where personal and urban decay intersects with horror and ugliness, where ancient mythologies are interrelated with technological advances, and where the human psyche becomes both the weapon and the battlefield in the struggles transcending conventional understanding. The above-mentioned authors show how dark fantasy's possible world verbal construction serves not only as a specific entertainment domain but also as a philosophical inquiry form into the reality nature. It is worth mentioning that this inquiry significance makes emphasis on literary criticism, as well as cultural and philosophical

domains. Therefore, dark fantasy's possible worlds explicit construction offers an exquisite perspective on how meaning can be created, maintained, changed and eradicated within narrative frameworks. The dark fantasy authors' aim to explore the darker reality's flexibility implications makes it specifically relevant to modern discourse about perception, truth, ethical norms and meaning construction in an increasingly changing and mediated world.

Therefore, the dark fantasy possible worlds' study construction based on Joe Abercrombie's novel *The Blade Itself* through verbal narrative serves a wide range of purposes:

- to create the corpus of new lexical units, neologisms, used by Joe Abercrombie in his world-known novel *The Blade Itself*;
- to identify and classify new lexical units created by Joe Abercrombie to represent his possible world;
- to analyze neologisms' structural and semantic characteristics and explain the context of their use;
- to identify specific linguistic mechanisms through which Joe Abercrombie uses English to construct his possible world, examining how his narrative strategies help readers understand the possible world elements integration with recognizable reality;
- to analyze how Abercrombie's innovations and non-standard linguistic constructions address the contemporary crisis of representational inadequacy in dark fantasy discourse, demonstrating how the author transcends conventional language limitations to express complex fictional concepts beyond standard expressive capacity.

2. Literature Review

2.1 The Origin and Key Features of Fantasy

Fantasy (from Greek '*phantasia*' – "*power of imagination, appearance, image, perception*" (Etymonline, n.d.)) has been an inseparable part of the humankind for many centuries. The establishment of modern fantasy as a specific literature genre started in the 19th century. It was founded by the best-known English writer, literary critic and Professor John R.R. Tolkien (1892-1973) (D`Amassa, 2006; Pagan, 2020). His masterpieces, *The Hobbit* and *The Lord of the Rings*, are filled with mythological and philosophical context and provide a detailed depiction of an imaginary universe (Donahue-Martens & Simonson, 2025; Le Nepvou, 2025). The main goal of fantasy is to reveal a universe or possible world that lies beyond the boundaries of ordinary life. One of the key tasks of this literary genre is to encourage readers to create their own original vision based on the spiritual search for truth (Joshi & Sharma, 2024).

People are interested in mystical and fantastic themes and worlds described in fantasy novels. Elements inherent in modern fantasy can be found in ancient myths, legends and fairytales of various cultures worldwide (Cowe, 2025; Nichols, 2006; Parks, 2009). These elements include ghostly worlds filled with monsters, mysticism, magicians and wizards with supernatural powers, dark and good forces, unrealistic universes, bizarre creatures, unique events, as well as the ambiguous psychology of the possible worlds (Jakhani & Mazhar, 2025; Ryan, 1991).

Currently, there are three main directions of the fantasy genre: classical, historical, and scientific ones. In classical fantasy, the action takes place in the real or fictional past. In the historical fantasy the plot revolves around real historical events. The scientific fantasy combines mythological traditions and elements of science fiction. It is worth noting that the term '*fantasy*'

still does not have a generally accepted definition in contemporary literary studies. The reason for this may be the complete blurring of the connections between the real and possible worlds because the fictional worlds of the fantasy genre are full of magic, sorcery, and supernatural forces and phenomena. According to the Cambridge Dictionary (n.d.), fantasy is “a type of story or literature set in an imaginary world, often involving traditional myths and magical creatures and sometimes ideas or events from the real world”.

Each fantasy world has its own geography, language, culture, mythology, religion, and history (Donahue-Martens & Simonson, 2025). All these elements form the authors' possible world (Babelyuk, 2021; Ryan, 1991). Another crucial element of world creation is place names, character names, flora and fauna names, etc. It is important to understand the fantasy environment as it can not only immerse readers in a fictional universe but also form an idea of certain moral, social, and spiritual qualities possessed by its inhabitants (Jakhiani & Mazhar, 2025; Le Nepvou, 2025). Social characteristics, such as names and languages, are also important elements of world creation as they reflect certain cultural aspects (Donahue-Martens & Simonson, 2025; Pagan, 2020). Another significant factor is the social system of the world. In fantasy, characters are often given different titles, so there must be certain rules for dealing with people of different titles, classes, and castes. For example, the title *Arch Lector*, created by Joe Abercrombie, makes emphasis on the status of the character's authority (Abercrombie, 2015).

Beliefs and myths are also an essential part of the fantasy world. Every fictional world has its own beliefs and mythology, which makes it unique and different from all others. In the fantasy genre, authors have the right to choose the gods, mythological creatures, and legendary heroes of their worlds (Nichols, 2006). Magic and the way that it is used in the authors' possible world are integral components of the imaginary universe (Pagan, 2020; Senft, 2020). Therefore, fantasy is a genre of literature, originated in England in the second half of the 19th century, whose features are present in all literary genres and whose works represent unreal and parallel or possible worlds with their unique features.

2.2 Dark Fantasy as a Genre of Literature

The genre of *Dark Fantasy* was formed on the basis of the merger of Gothic literature with elements of horror and traditional fantasy. This genre did not develop immediately; its development took some time and began in the second half of the 19th century. The writers began to describe supernatural phenomena and dark aspects of human nature in their works. The term ‘*dark fantasy*’ appeared only in the early twentieth century. According to the LanGeek dictionary (n.d.), dark fantasy is “a subgenre of fantasy that combines elements of fantasy with horror or darker themes, often featuring antiheroes and a sense of dread or unease”.

Dark fantasy has its own rules and laws; its worlds are boundless and have no restrictions. The authors always create the universe that obeys certain laws and rules (Joshi & Sharma, 2024). Due to this literary freedom, writers may explore elements that could help them stand out from the crowd and create something completely unique (Matthews, 2016; Nichols, 2006). Dark fantasy has many qualities that distinguish it from other genres. One of the differences is the characters with uncertain and blurred morals. In dark fantasy, there is no classification of characters into good and evil; they all commit bad deeds for which there is no forgiveness in the real world. In this genre, attention is focused on the development of the character's personality and how it changes over the described period. The gloomy and dark atmosphere is the other specific feature of the genre (Sattarujawong, 2025). The world where the action takes place is dominated by violence and cruelty, and the world itself is filled with horrors. The

readers seem to feel tension and danger while reading works of this genre, which is absolutely normal. The elements of dark magic is also one of dark fantasy qualities (Joshi & Sharma 2024; Senft, 2020). One more element that differs from other genres is that there are no archetypal heroes (Pagan, 2020). Their faces are covered with deep scars; their clothes are far from perfect. They may be morally weak, which makes the character's development very realistic. The authors usually depict a society with many secrets and deceptions. That is why various political and social manipulations, conflicts over maintaining power and control, and treason are important elements of this genre (D'Amassa, 2006; Jakhrani1 & Mazhar, 2025; Joshi & Sharma 2024; Le Nepvou, 2025).

Currently, there are three key categories of dark fantasy: traditional fantasy with a dark tone, horror with elements of the mystic, and fantasy written in a melancholic tone. The term '*melancholic tone*' refers to the author's ability to describe the world with the utmost sense of gloom and despair by means of lexical units, specifically neologisms. Therefore, the dark fantasy genre challenges the notion of good and evil and their place in the world, showing readers how different the world may be and offering a bizarre perspective on people and the universe as a whole. The main distinguishing feature of dark fantasy is that it immerses the readers in the atmosphere as much as possible and allows them to stay there for as long as they wish. Furthermore, to present people, planets, geography, objects, and all other aspects of possible worlds and parallel realities in the dark fantasy genre, writers create many new lexical items, such as neologisms. By means of these units, authors can show their world's uniqueness.

2.3 Peculiarities of Neologisms Used in the Dark Fantasy Genre

The term '*neologism*' first appeared in 1772 in French (*néologisme*). It was used to refer to practice of innovation in language, the use of new words or old words in new senses (Etymonline, n.d.). Since then, the term has been used to refer to new words and phrases not only in English but also in other languages. Many researchers have been studying neologisms and their text definitions. Moreover, they pay attention to specific characteristics of authors' neologisms, as well as principles of their formation (Aleksandruk, Palchevska, & Hubych, 2023; Fontaine, 2017; Korpi, 2021; Nam, 2021; Nelcoska, 2020; Plag, 2002). Neologisms primarily differ from the existing lexical items in being completely novel ones. They have their own connotations and structures within a certain communicative group. There are two categories of neologisms: new lexemes and new meanings.

New vocabulary can be introduced into the language by creating such elements as proper names, industrial names, abbreviations, acronyms, initials, and borrowings. Among the processes used to create neologisms are affixation, word compounding, metaphorization / metonymization, shortening, and conversion. Such processes are used in English to create new lexical units on a regular basis (Fontaine, 2017; Maroneze & Ganança, 2024; Plag, 2002; Renouf, 2020). Neologisms can be considered historically related concepts that classify lexical units in accordance with their formation period. In order to distinguish neologisms from other lexical units, specific criteria are determined: nominative, temporal, psycholinguistic, and locative. All words or phrases created by the author are considered to be occasionalisms. They can be used only in the context provided by the writer and are not included into the general dictionaries. Furthermore, such lexical innovations are distinguished by their creativity (Munat, 2007).

Occasionalism is defined as expressions or statements that are not related to typical usage and reflect the individual taste and speaker's knowledge of world-building processes. Therefore, it is evident that occasionalisms can be of different forms (Selivanova, 2010).

Occasionalisms are not part of the general vocabulary of the language. Their meaning can be understood only when they are used in a certain context, otherwise their meaning is completely lost or incomprehensible to readers. These words and terms have their own original meaning, which is not common and does not correspond to the norms of general use (Nam, 2021). The main difference between occasionalisms and neologisms is their uniqueness and novelty (Selivanova, 2010).

To create an entirely new lexical unit, authors use many different world-building processes that exist in their language or borrow them from other languages. These processes include morphological (suffixation, prefixation, compounding, backformation, shortening or clipping), syntactic (formation of phrases and phraseological units), semantic (rethinking of words of the national language on the basis of cognitive processes of metaphorization and metonymization), morphological-syntactic (conversion) and errors (misspelling, mishearing, mistranscription and mispronunciation) (Fontaine, 2017; Nelcoska, 2020; Plag, 2002; Renouf, 2020). Therefore, neologisms play an important role in representing the imaginary worlds of the dark fantasy genre. Fantasy works of the following genre present new visions of the events and concepts that do not exist in reality by means of novel lexical units formed applying different word-building processes.

3. Methodology

3.1 Research Foundation and Theoretical Framework

This study is grounded in the understanding that language serves as the fundamental medium through which authors construct possible worlds and communicate complex conceptual frameworks to their readers (Herman, 2008; Mansworth, 2022). The research operates on the premise that linguistic innovation, particularly through neological creation, represents a critical response to what can be termed the ‘crisis of representational adequacy’ in fiction. This crisis manifests when authors encounter the limitations of existing vocabulary in expressing concepts that transcend conventional reality, necessitating the creation of new linguistic tools to bridge the gap between imagination and expression. The theoretical foundation of this research acknowledges that Joe Abercrombie, in creating *The Blade Itself*, confronted a dual linguistic crisis. First, the author faced the challenge of constructing a dark fantasy possible world that maintains conceptual grounding in recognizable reality while simultaneously diverging from it in meaningful ways. Second, Abercrombie encountered the limitations of standard English discourse in adequately representing the moral ambiguity, psychological complexity, and cultural distinctiveness that characterize dark fantasy as a literary genre. The systematic creation of neologisms thus represents Abercrombie's strategic response to these representational crises, enabling the construction of a linguistically unique possible world that transcends the expressive capacity of conventional vocabulary.

3.2 Data Collection and Corpus Construction

The primary data for this research comprises a comprehensive corpus of 1,115 new lexical units extracted from Joe Abercrombie's *The Blade Itself* (2015). The corpus construction process involved multiple reading phases to ensure comprehensive identification of all lexical innovations within the text. During the initial reading phase, potential neologisms were flagged based on their absence from standard English dictionaries and their apparent function in worldbuilding activities. Subsequent reading phases involved verification of the identified units and contextual analysis to confirm their neological status. The corpus comprises various categories of lexical innovation, including proper nouns (personal names, geographical designations, political entities), common nouns (cultural concepts, objects, creatures), adjectives (descriptive terms specific to the fictional world), and compound constructions that

combine existing English elements in novel ways to create world-specific meanings. Each identified neologism was catalogued with its immediate textual context, occurrence frequency, and apparent semantic function within the narrative framework. The data collection process recognized that neological identification requires careful distinction between genuine lexical innovation and existing words employed in specialized contexts. Therefore, comprehensive cross-referencing with multiple authoritative sources was conducted to confirm the neological status of the identified units and to trace potential etymological connections to existing linguistic elements.

3.3 Reference Materials and Lexicographical Framework

The analytical framework incorporates multiple authoritative reference sources to provide comprehensive coverage of existing lexical knowledge and to facilitate accurate identification of genuine neological innovations. *The Cambridge Dictionary* serves as the primary reference for contemporary standard English usage, ensuring that identified neologisms represent genuine departures from established vocabulary rather than obscure but legitimate existing words. *The Longman Dictionary* provides additional lexicographical depth, particularly for regional and historical variations in English usage that might otherwise be mistaken for neological innovation. *LanGeek Dictionary* offers contemporary linguistic insights, particularly regarding recent developments in English vocabulary that might influence the potential neologisms' classification.

Specialized reference materials address the genre-specific and cultural contexts relevant to dark fantasy literature. D'Amassa's *An Encyclopedia of Fantasy and Horror Fiction* (2006) provides essential background on established conventions within speculative fiction, enabling differentiation between Abercrombie's genuine lexical units and adaptations of existing genre terminology. Parks' *U•X•L• Encyclopedia of World Mythology* (2009) offers crucial insights into cultural and mythological references that may underlie apparently neological constructions. *Etymonline.com* serves as the primary etymological resource, providing historical linguistic data essential for tracing the origins of potentially neological elements and identifying the linguistic processes through which new words are constructed from existing morphological components.

3.4 Analytical Methodologies

Contextual analysis serves as the basic methodological approach, examining each identified neologism within its immediate textual environment to determine semantic content, functional role, and relationship to the broader narrative framework. This method involves systematic examination of syntactic positioning, semantic relationships with surrounding vocabulary, and contribution to worldbuilding activities. This analysis enables comprehensive understanding of how new lexical units function within Abercrombie's fictional discourse and how they contribute to the construction of his dark fantasy possible world.

Linguistic analysis focuses on the formal properties of identified neologisms, examining their phonological structure, morphological composition, and syntactic behavior within the text. This analytical approach identifies patterns in Abercrombie's neological strategies, revealing systematic approaches to lexical innovation and highlighting the linguistic principles underlying his world-building activities. The following analysis encompasses the examination of word classes, morphological processes, and semantic relationships between new and established vocabulary.

Word-formation analysis investigates specific morphological processes through which Abercrombie constructs new lexical units, identifying productive patterns of lexical creation

within the corpus. This methodology examines derivational processes, compounding strategies, semantic extension mechanisms, and other morphological operations applied in neologisms' construction. Word-formation analysis reveals the systematic nature of Abercrombie's linguistic innovation and identifies the most productive mechanisms for creating new lexical units within his fictional framework.

Etymological analysis traces the historical and linguistic origins of newly created elements, identifying existing morphological components and semantic sources that contribute to new word construction. This approach emphasizes the relationship between Abercrombie's innovations and established English vocabulary, revealing how the author manipulates existing linguistic resources to create novel semantic content. Moreover, etymological analysis reconstructs the conceptual foundations underlying neological creation, identifying the cultural and semantic associations that inform new word construction. These complementary analytical approaches examine the cultural and social dimensions of new lexical units, investigating how Abercrombie's lexical creations reflect and construct specific cultural frameworks within his possible world. Linguo-cultural analysis examines the relationship between language and cultural identity, investigating how neological units contribute to the construction of distinct cultural groups within the narrative. Socio-cultural analysis focuses on the social functions of neological vocabulary, examining how new lexical units reflect power relationships, social hierarchies, and cultural values within Abercrombie's dark fantasy world.

4. Results and Discussion

4.1 Semantic Neologisms

A lexical term that already exists in the language but takes on a new meaning is known as a semantic neologism. The creation of new syntagmatic connections within the lexical system must thus be considered when doing a neosemantic analysis. Semantic neologization is a highly productive process that assigns a new meaning to an existing word (Maroneze & Ganança, 2024; Munat, 2007; Renouf, 2020). Researchers seek agreement on the status of semantic neologisms. One of the most controversial issues is whether semantic changes lead to the creation of an independent word or just the development of a new meaning for an existing lexical unit.

The creative process heavily relies on the semantic mode. Examining a term's lexical meaning as well as metaphorical and metonymic transfer is all part of the semantic domain of potential ancient word formation. In Joe Abercrombie's first novel in *The First Law trilogy*, *The Blade Itself*, semantic neologisms play an important role in constructing a separate world. They give the well-known words and phrases new meanings or consequences while revealing societal quirks, social relationships, the magic system, and philosophy. There are a number of semantic neologism cases in Joe Abercrombie's novel *The Blade Itself*. Branding of Abercrombie's neologisms is an example of his unusual writing style, as well as of his ability to give readers a glimpse of something that is not only unconventional but also of a world that is very thought provoking.

The particular use of the word '*grim*' in the novel: "Forley, Grim, the Dogman, all of them" (Abercrombie, 2015, p. 9) is an example of a neologism, which is an anthroponym. The following lexical unit bears particular meanings within the literary tale framework. Based on the contemporary English nominal unit '*grim*', which may be translated as '*serious, severe, forbidding, or associated with cruelty or severity*', this word is derived from the original. '*Grim reaper*' as a figurative phrase for '*death*' is attested by 1847 (the association of *grim* and *death* goes back at least to the 17th century). A Middle English expression for '*have recourse to harsh*

measures’ was to be wend the ‘grim tooth’ (the early 13th century) (Etymonline, n.d.). Through the use of this term, the author portrays the gloomy mood of the work, as well as the nature, characteristics, and behavior of the character. As evident from the analysis, Abercrombie does not create an entirely new lexical unit but rather repurposes an existing one for anthroponymic function. Thus, ‘Grim’ may be referred to as a semantic (metaphoric) transfer rather than a true neologism. This distinction is essential as it highlights Abercrombie’s deliberate exploitation of the word’s established semantic field rather than the invention of novel terminology.

The neologism ‘*Spicer*’ is used to refer to a specific group of individuals or a public affiliation in the fictitious universe of *The Blade Itself*: “They’re all at it! The Mercers, the Spicers, all of them! Every damn fool with a boat!” (Abercrombie, 2015, p. 17). Therefore, it is worth examining its context, meaning, and origin in greater detail. This neologism is derived from the English word ‘*spice*’, which is the primary component that determines the ultimate meaning of the phrase. The morphological construction of ‘*Spicer*’ demonstrates productive word-formation processes in the English language, employing the base lexeme ‘*spice*’ with the agentive suffix ‘-er’ to create a professional designation. This construction follows established English morphological patterns while generating novel semantic content specific to Abercrombie’s possible world. The etymological transparency of the construction enables readers to infer semantic relationships between the neologism and existing vocabulary, facilitating comprehension while maintaining the distinctiveness of the fictional terminology. The socio-cultural implications of ‘*Spicer*’ reveal Abercrombie’s sophisticated approach to economic and social stratification within his dark fantasy world. By designating spice traders as a distinct guild, the author constructs a realistic economic framework that reflects historical precedents where spice trading represented significant wealth and social power. This neological choice addresses the representational crisis by creating terminology that simultaneously evokes familiar historical concepts while establishing the unique social structures of Abercrombie’s possible universe, thereby bridging the gap between reader recognition and narrative authenticity.

When referring to a group or a particular community in a possible fantasy world, the author makes use of the neologism ‘*the pinks*’: “Trading with the pinks are you? Damn Union!” The officer spat in the dust. “Still, a man has to make a living, I suppose, if a shameful one. Trade while you can, the pinks will be gone soon, swept back into the ocean!” (Abercrombie, 2015, p. 260). The formation of this neologism is accomplished by the process of metaphorical transfer. This occurs when the color is transferred to a person, so proceeding from the inanimate to the alive. Thus, it is possible for readers to form certain connections that relate to the ways in which the group in question appears. People, known as ‘*the pinks*’, are easily distinguished by the physical characteristics that are linked to having a pale skin. It is possible to assume that they have a pink or extremely pale skin color, either of which might explain why they are named like that. The neologism ‘*the pinks*’ emphasizes Abercrombie’s systematic approach to addressing the crisis of ethnic and social nomenclature in fantasy worldbuilding through metaphorical color transfer. This linguistic strategy enables the author to create immediately recognizable social distinctions while simultaneously evoking real-world patterns of discrimination and othering, thereby bridging the gap between fictional social structures and contemporary readers’ understanding of prejudice, stereotypes, and marginalization. Examples include Tolkien’s green-skins in this regard Abercrombie’s use of color-based group identification not only establishes authentic-feeling social tensions within his dark fantasy world but also demonstrates how neological innovation can efficiently convey complex sociocultural dynamics that would require extensive exposition through conventional descriptive language.

Another instance of the neologism created through metaphorical transfer is '*leech*': "Confiscated from Rews. The property of the Crown now, of course. I thought that I should give it to you, as my direct superior, so that you could pass it on to the Treasury. Or buy a bigger desk, you leech" (Abercrombie, 2015, p. 17). In this instance, the author uses this word to characterize the hero, enriching him with a negative connotation. According to the etymological dictionary of the English language, the word '*leech*' has a meaning of '*a bloodsucking aquatic worm*', from Old English *læce* (Kentish *lyce*), of unknown origin (with a cognate in Middle Dutch *lake*) (Etymonline, n.d.). Commonly regarded as a transferred use of *leech* (n.2), but according to OED, the Old English forms suggest this is a distinct word, which has been assimilated to *leech* (n. 2) by folk etymology. It has figuratively been applied to human parasites since 1784 (Etymonline, n.d.). This term is entirely offensive, revealing the character's negative aspect. The narrator expresses contempt for the individual he is discussing by means of this term. This metaphorical transfer from the animal to human domain (Cornelius, 2023; Zang, 2021, pp. 50-52) not only establishes immediate negative connotations but also illustrates how the author revitalizes existing semantic relationships to create authentic interpersonal dynamics within his possible world, thereby resolving the representational challenge of expressing complex social hierarchies and personal animosities through economical linguistic means.

One of the orders that may be found in Joe Abercrombie's world is called '*The Magi*': "The Magi are an ancient and mysterious order, learned in the secrets of the world, practiced in the ways of magic, wise and powerful beyond the dreams of men" (Abercrombie, 2015, p. 47). This neologism is essential for gaining a comprehensive understanding of the possible world. Moreover, it contributes to the creation of an enigmatic and magical environment. It is worth noting that Ancient Greeks used the term '*magi*' to describe priests or sages who were in possession of holy knowledge and who participated in magical rituals (Longman Dictionary, n.d.). Additionally, it causes readers to have connections with magical things. The word '*Magi*' is quite specific in terms of the universe of Joe Abercrombie as it relates to a pre-existing order with roots in the power structure that contains secret knowledge, which refers it to an ancient group of powerful beings. This choice demonstrates how the author addresses the challenge of creating believable magical institutions by leveraging existing cultural associations with ancient wisdom and power, thereby enabling readers to quickly comprehend complex hierarchical structures without extensive exposition while maintaining the mysterious atmosphere essential to dark fantasy narratives.

The neologism '*Practical Vitari*' simultaneously combines a title and a character's personal name. The meaning of the *Vitari* is '*The one that should be avoided*', which originates from the Latin language (Etymonline, n.d.). "This is Practical Vitari," chuckled Goyle, indicating the red-haired woman, who had flowed over to the jars and was peering into them, one at a time, tapping on the glass and making the specimens wobble" (Abercrombie, 2015, p. 362). Considering the significance of the name, we may arrive at a number of conclusions on the person. It is possible to characterize her as someone who is potentially hazardous or someone who should be avoided at all costs due to numerous reasons. In the process of creating a new lexical unit, cognitive mechanisms of association and analogy were involved. The compound neologism '*Practical Vitari*' exemplifies Abercrombie's resolution of the naming crisis in dark fantasy character development by fusing Latin etymological roots with professional titles to create immediately ominous yet intriguingly specific designations that convey both social function and inherent danger. This strategy demonstrates how Abercrombie addresses the challenge of efficient character introduction by employing cognitive mechanisms of association and analogy. Consequently, readers comprehend a character's threatening nature and

institutional role without requiring extensive descriptive exposition, thus maintaining narrative momentum while establishing atmospheric tension typical of the dark fantasy genre.

The name of the hero *Shama Heartless* represents key aspects of the character's personality: "No more than thirty men had watched him kill Shama Heartless, kill him then butcher him like a pig" (Abercrombie, 2015, p. 27). The hero's nature and spirit are revealed by this lexical unit, which demonstrates that Joe Abercrombie's universe is exactly what it seems to be – harsh, dark, and horrifying. Although it is not a real name, the author came up with the name '*Shama*' solely for the purpose of the book. '*Shama*' derives from Ishmael masculine proper name, biblical son of Abraham and Hagar, driven into the wilderness with his mother, from Hebrew Yishma'el, literally *God hears*, from Yishma, imperfective of Shama *He heard*. The Arabs claim descent from him. Figurative sense of '*an outcast, 'whose hand is against every man, and every man's hand against him*' is from Genesis XVI.12 (Etymonline, n.d.). In this instance, the author also makes use of the metaphorical transfer method. In this case, Abercrombie combines biblical etymology with brutal descriptors, thus creating a compound designation that simultaneously evokes the outcast archetype from Genesis while explicitly signaling the hero's moral vacancy and violent nature.

These linguistic strategies collectively address the crisis of efficient worldbuilding by enabling rapid character comprehension, atmospheric establishment, and social hierarchy construction without sacrificing narrative momentum or requiring extensive exposition. Ultimately, Abercrombie's lexical innovations exemplify how contemporary dark fantasy authors can transcend the limitations of conventional vocabulary to create linguistically authentic possible worlds that maintain both imaginative distinctiveness and communicative effectiveness. The most common method for semantic derivation is metaphorical transfer. The similarity of color, shape, size, features, and functions is fundamental to this study. When a name is transferred, two types of neologisms may be formed: the first type occurs when inanimate items are given the characteristics and attributes of other inanimate objects, and the second one occurs when inanimate objects are given the qualities and features of humans or other beings.

4.2 Morphological Neologisms

Morphological development is one of the most prevalent ways that neologisms emerge. Abbreviations, acronyms, morpheme combinations (word compounding), prefixes, suffixes, and other morphological processes are used to create new words in English. Language may respond to the human need to recognize and communicate novel events and concepts due to this very productive mechanism. Since morphological techniques allow speakers to convey new ideas and concepts, they play an essential role in creating new words in a language. Furthermore, they ensure that other speakers can grasp the language and help maintain its logical structure.

One of the most important characteristics that distinguishes morphological neologisms from other types of neologisms is the presence of an analogy in their base. These morphemes are less neological than others since they are constructed by making use of pre-existing morphemes in line with the patterns present in the language system. It is important to note that word compounding and different affixation types are the most common word-formation processes.

Compounding is regarded as the most productive process of word creation in the English language. The great majority of compound words are created using the *N + N* (Noun + Noun) = *N* model, which is a result of the language's nominative function. The words created by means

of the process of word compounding are situated in a position that is intermediate between simple words, derivatives, and idiomatic combinations. Compounding words have resulted in the creation of a number of neologisms, some are listed below. The neologism '*Dogman*': "The Dogman had been with him until a moment before, he was sure, but there wasn't any sign of him now" (Abercrombie, 2015, p. 3) is an example of word compounding. It is developed by merging two English words '*dog*' and '*man*'. Thus, readers could conclude that the person with this name is loyal, has the capacity to locate certain items, and may even be aware of danger. The '*Dogman*' in the book is well-known for his exceptional sense of smell and spying abilities.

'*Flathead*': "He peered out and the Flathead hissed and stabbed at him" (Abercrombie, 2015, p. 3) is another unit created by word compounding. Here we observe how the terms '*flat*' (Adj.) and '*head*' (N) are joined to form a new noun denoting a proper name. This neologism follows the *Adj + N* neologism creation model, which turns out to be very productive one in new lexical units creation in the novel under analysis. In Joe Abercrombie's universe, *Flathead* is a violent and wild humanoid species that resemble orcs or trolls. The author uses this neologism to describe his fictitious creatures' look and physical differences from others.

'*Logen Ninefingers*': "It would take more than a few Flatheads to put an end to Logen Ninefingers." (Abercrombie, 2015, p. 4) is formed by applying the structural model *Num + N = N*. This linguistic innovation is the protagonist's name. It has a symbolic value and gives the character a distinct identity in the context of a possible world. This formation combines a number with a noun to produce a new noun, which denotes a proper name. *Ninefingers* refers to a person with nine fingers. This helps readers understand that the character is a warrior with significant fight expertise. The new lexical unit '*Threetrees*': "He saw the big log Threetrees and Dow had been sitting on when the Flatheads came" (Abercrombie, 2015, p.8) is constructed in the same manner as described above. This proper name is formed by combining the number and the noun *Num + N = N*. The neologism in question brings with it a specific connotation that is characteristic of the hero.

'*Kingsway*': "Varuz be damned," he said to himself, nearly walking as he turned onto the Kingsway, but had to speed up again straight away." (Abercrombie, 2015, p.) is a neologism created by combining two words '*king*' and '*way*' (*N + N = N*). Based on the fact that the exact meaning of this neologism is *the way of a king*, it is evident that this road is significant and is connected to royal power in a certain way. The neologism '*boil-face*': "Boil-face tottered away, spinning around after his axe." (Abercrombie, 2015, p.52) is created by compounding two words used in the English language. By using the *N+N=N* model, two nouns are combined to make it.

The neologism '*Stone-splitter*': "In his own country they call him the Stone-Splitter, would you believe, but I don't think that would work here, do you Glokta? Practical Stone-Splitter, can you imagine?" (Abercrombie, 2015, p. 362) was created by combining the words *stone* and *splitter*. The verb *to split* is the root of the noun '*splitter*', which is derived from it. The addition of the suffix *-er* resulted in the noun formation that indicates the person who carried out the activity. The pattern that this word production model follows is one in which the first element defines an item, and the second one represents an activity. Within the overall structure of this piece of work, the term *Stone-Splitter* refers to *one who splits stones*. Therefore, it is evident that the character possesses a great deal of strength, resilience, and the ability to effortlessly overcome the challenges.

The lexical innovation '*Bad-Enough*' in "The Dogman could just see Bad-Enough grinning under his helmet." (Abercrombie, 2015, p. 449) is formed by combining an adjective and an adverb (*Adj + Adv=N*). Readers are made aware that the character is not a positive figure by the use of this the name. This neologism describes the temperament of the character in a specific situation. Joe Abercrombie's works frequently feature the use of nicknames, which serve as a form of linguistic play and provide a sarcastic impact.

The comprehensive examination of morphological neologisms in *The Blade Itself* reveals Abercrombie's systematic approach to resolving the naming crisis in dark fantasy through productive compound construction patterns that maintain linguistic transparency while establishing fictional uniqueness. The predominant use of N+N compounding models (Anderson, 2007; Booij, 2005) demonstrates how the author can address the challenge of creating immediately comprehensible character and location designations by exploiting English morphological productivity to generate semantically unified concepts that transcend individual lexical limitations. Abercrombie's strategic employment of varied structural patterns, including Adj+N, Num+N and Adj+Adv, illustrates his sophisticated understanding of morphological flexibility in addressing diverse needs within his possible world. The consistent use of existing English morphemes in novel combinations enables readers to decode character attributes and environmental features through analogical reasoning, thereby resolving the representational crisis by bridging familiar linguistic patterns with innovative fictional concepts. These morphological innovations collectively demonstrate how compound neologisms serve as efficient worldbuilding tools that establish character identities, geographical significance, and social relationships without requiring extensive narrative exposition. Ultimately, Abercrombie's morphological strategies exemplify how dark fantasy authors can transcend conventional vocabulary limitations through systematic exploitation of English word-formation processes, creating linguistically authentic possible worlds that maintain both imaginative distinctiveness and communicative clarity.

5. Conclusions

This comprehensive analysis of lexical innovations in Joe Abercrombie's *The Blade Itself* demonstrates how contemporary dark fantasy literature systematically addresses fundamental crises of linguistic representation through strategic lexical creation. The study reveals that Abercrombie's approach to worldbuilding transcends mere imaginative construction, representing a sophisticated linguistic response to the inherent limitations of standard English vocabulary when confronting the conceptual demands of dark fantasy narrative.

The research identifies and analyzes a corpus of 1,115 neological units, revealing systematic patterns in Abercrombie's approach to linguistic innovation that directly address what can be characterized as multiple intersecting crises within literary discourse. These crises manifest at several critical levels: the conventional vocabulary semantic inadequacy to express dark fantasy's moral complexity, the representational limitations of standard discourse when constructing authentic fictional worlds, and the communicative challenges inherent in bridging familiar linguistic frameworks with unprecedented conceptual domains. The analysis reveals that Abercrombie's neological strategies operate through sophisticated morphological processes that extend far beyond simple lexical substitution. The study identifies three primary neological creation mechanisms: morphological derivation, semantic derivation, and word compounding, each serving distinct functions within the broader framework of worldbuilding and crisis resolution.

Morphological derivation emerges as a fundamental process through which Abercrombie creates professional designations, cultural identifiers, and social hierarchies within his fictional world. The systematic application of productive English affixes (*-er*, *-ing*, *-tion*) to novel base forms enables the author to maintain linguistic accessibility while establishing distinct terminological systems. This approach addresses the crisis of professional and social nomenclature by creating immediately comprehensible yet distinctively fictional vocabulary that grounds readers within Abercrombie's alternative social structures. Word compounding represents the most productive morphological strategy identified within the corpus, enabling the semantically unified concepts creation that transcend the individual lexical units' expressive capacity. Through systematic combination of existing English elements, Abercrombie constructs complex designations for geographical entities, cultural practices, mythical creatures, and technological innovations. This compounding strategy directly confronts the representational crisis by enabling precise designation of concepts that exist beyond the boundaries of conventional reality while maintaining morphological transparency that facilitates reader comprehension. The analysis of compound constructions reveals Abercrombie's sophisticated understanding of English morphological principles, employing head-final structures that preserve semantic clarity while enabling creative conceptual extension. Examples such as guild designations, geographical nomenclature, and cultural terminology demonstrate how compounding enables the interconnected terminological networks that support comprehensive worldbuilding activities systematic construction.

Semantic derivation, particularly through metaphorical transfer, emerges as the most sophisticated mechanism for addressing the crisis of conceptual representation within dark fantasy discourse. The research demonstrates that Abercrombie systematically employs metaphorical extension based on similarities in physical characteristics, functional properties, and cultural associations to create novel lexical units that maintain semantic accessibility while introducing novel conceptual content. The analysis reveals that metaphorical transfer operates through exploitation of experiential domains familiar to readers, enabling the construction of fictional concepts through analogical relationships with known phenomena. This strategy addresses the fundamental crisis of communication between author and readers by establishing cognitive bridges between familiar conceptual frameworks and innovative fictional constructs. Color-based metaphorical extensions create atmospheric and cultural associations that contribute to the dark aesthetic characteristic of the genre. On the other hand, shape- and size-based transfers enable precise designation of fictional creatures and objects. Functional metaphors establish technological and cultural practices within the fictional world, creating systematic relationships between familiar activities and their fictional counterparts. The neological analysis reveals how Abercrombie's linguistic innovations serve broader functions of social and cultural construction within his dark fantasy possible world. The systematic creation of guild designations, professional titles, and cultural identifiers establishes complex social hierarchies that reflect realistic economic and political structures while maintaining the distinctive characteristics of fictional societies. The research demonstrates that neological choices reflect unique understanding of historical and contemporary social dynamics, thus enabling the construction of believable alternative societies that resonate with readers' experience while maintaining fictional authenticity. Cultural and religious terminology within the corpus reveals systematic approaches to constructing belief systems, traditional practices, and mythological frameworks that support comprehensive worldbuilding while addressing the representational crisis inherent in describing alternative cultural realities through conventional linguistic resources.

This study contributes significant insights into the evolving relationship between linguistic innovation and literary representation within speculative fiction. The systematic analysis of Abercrombie's neological strategies reveals how contemporary authors navigate the tension between linguistic accessibility and creative authenticity, developing original solutions to representational crises that have long characterized fantasy literature. The research demonstrates that neological innovation within dark fantasy represents more than stylistic choice, constituting a necessary response to fundamental limitations within standard literary discourse. Abercrombie's systematic approach to lexical creation provides a model for addressing representational inadequacies while maintaining readers' engagement and comprehension. The findings suggest that neological innovation within speculative fiction serves dual functions: enabling precise designation of fictional concepts while simultaneously expanding the literary language expressive capacity. This dual functionality addresses both immediate narrative needs and broader literary challenges related to the possible realities' representation.

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Part II

Contributions in French

Discours des crises/crises des discours

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1. La dialectique crise/discours : un cadre théorique fondamental

Toute crise - qu'elle soit économique comme le krach de 1929, politique comme les Printemps arabes, identitaire comme les crises migratoires contemporaines, ou sanitaire comme la récente pandémie de Covid-19 - ne constitue pas seulement un événement objectif mesurable par des indicateurs quantitatifs. Elle représente avant tout une construction sociale et discursive complexe qui engage des processus de signification, d'interprétation et de narration. Comme l'ont montré les travaux fondateurs de Barthes (1968) et Derrida (1967), il n'existe pas de réalité sociale en dehors des systèmes de signification qui la portent. Selon Barthes : “ (...) le pouvoir est présent dans les mécanismes les plus fins de l'échange social : non seulement dans l'État, les classes, les groupes, mais encore dans les modes, les opinions courantes, les spectacles, les jeux, les sports, les informations, les relations familiales et privées, et jusque dans les poussées libératrices qui essayent de le contester (...) ”.⁵⁶ Cette vision éclaire la nature profonde des crises contemporaines : celles-ci ne surgissent pas *ex nihilo*, ni ne se limitent aux manifestations visibles, étant donné que les crises que l'on observe à la surface ne sont, en réalité, que le reflet, voire l'aboutissement, de tensions plus profondes, d'ordre idéal et symbolique.

Ces conflits trouvent leur lieu d'expression privilégié dans le discours, où s'affrontent des visions du monde, des systèmes de valeurs et des régimes de vérité concurrents. Le discours, loin d'être un simple instrument de communication, devient ainsi un champ de bataille où se rejouent les contradictions internes du social. Il est lui-même traversé par les tensions qu'il tente de nommer : les mots de la crise sont eux-mêmes en crise. En ce sens, le langage n'est pas seulement le miroir du pouvoir — il en est aussi le terrain de lutte et de recomposition.

Selon Derrida, la crise contemporaine du discours peut être comprise non seulement comme un effritement des cadres de légitimation, mais aussi comme une manifestation de l'ouverture permanente du langage à l'interprétation et à la reconfiguration. Le discours n'est jamais pleinement maîtrisable, ce qui souligne l'instabilité du langage et l'impossibilité d'un sens fixe. Pour lui, “ce qui ne peut être dit ne doit pas être tu, mais écrit”, ouvrant ainsi la voie à un discours qui résiste à la totalisation et demeure toujours en attente d'un sens « à-venir ». En ce sens, la crise, en tant que phénomène social total, émerge dans et par le discours qui la nomme, la qualifie et lui donne sens.

Cependant, Derrida, qui accorde la primauté à l'écriture sur l'oralité, rappelle que cette ouverture et cette instabilité ne concernent pas seulement le discours, mais aussi la lecture elle-

⁵⁶ Roland Barthes, *Leçon inaugurale de la chaire de sémiologie littéraire du Collège de France* prononcée le 7 janvier 1977.

même. Tout texte, selon lui, échappe à toute clôture interprétative : il vit de ses lectures successives, toujours partielles et situées. Comme il l'écrit dans *De la grammatologie*, "un texte a toujours plusieurs âges, la lecture doit prendre son parti"⁵⁷ — c'est-à-dire accepter cette pluralité irréductible de sens et de temporalités qui rend toute interprétation à la fois nécessaire et inachevée.

La relation dialectique entre crise et discours s'articule autour de trois moments essentiels. Premièrement, la crise est anticipée par un discours qui en prépare la perception et en configure d'avance les termes. Deuxièmement, elle génère un discours spécifique caractérisé par l'urgence, l'exceptionnalité et l'appel à l'action. Troisièmement, elle est légitimée et validée par un ensemble de discours secondaires qui en naturalisent l'existence et orientent les réponses institutionnelles. Ce "narratif", pour reprendre l'expression de Lyotard (Lyotard, 1979, p. 108), constitue un processus dynamique où les représentations langagières et les enjeux de pouvoir s'entremêlent inextricablement, contribuant à façonner la perception collective de la réalité et à légitimer certaines positions discursives au détriment d'autres.

Cependant, cette faculté du discours à rendre compte de la crise s'inscrit elle-même dans un cadre épistémologique traversé par une véritable crise du discours. La déconstruction des grands récits, théorisée par Lyotard dans « La Condition postmoderne », et la remise en cause des vérités universelles ont instauré un régime de vérité fragmenté où le langage devient un lieu de tâtonnement plutôt que de certitude. Comme le soulignent Foucault (Foucault, 1971, p. 11) ainsi que Mouffe et Laclau (1985, p. 93), le discours n'est jamais neutre : il constitue l'espace où se construisent, se contestent et se reconfigurent les rapports de force. Dès lors, il nous revient nécessairement d'appréhender la crise comme un phénomène de conflits sociaux, à travers un discours lui-même traversé par ses propres tensions et contradictions.

2. La généalogie d'un concept : crises et métamorphoses du discours

L'analyse de la crise comme catégorie intellectuelle ne constitue pas une préoccupation récente. Depuis les pères fondateurs de la sociologie moderne, la notion de crise a occupé une place centrale dans la théorisation des transformations sociales. Karl Marx voyait dans les crises du capitalisme l'expression des contradictions internes du système productiviste occidental — contradictions entre les forces productives et les rapports de production. Ces crises, loin d'être de simples accidents économiques, constituent le moteur même de l'histoire qui accélère la lutte des classes et prépare les conditions objectives du dépassement du capitalisme. Durkheim concevait la crise comme une manifestation pathologique de l'anomie, c'est-à-dire une situation où la désintégration des normes sociales et morales engendre une perte des repères collectifs. Dans un tel contexte, les individus ne trouvent plus dans la société les cadres normatifs capables d'orienter leurs comportements et de réguler leurs désirs, ce qui conduit à une désorganisation du lien social et, in fine, à un affaiblissement de la cohésion collective.⁵⁸ Max Weber, pour sa part, interprétait les tensions sociales comme le produit du processus de rationalisation de la société, qui entraîne ce qu'il appelle le "désenchantement du monde."⁵⁹ Selon lui, la

⁵⁷ Jacques Derrida, *De la grammatologie*, *supra*, p. 150

⁵⁸ Emile Durkheim, *Le suicide*, (1897), PUF, 2007.

⁵⁹ Le « désenchantement du monde » est un concept élaboré par Max Weber ; il décrit le processus historique de recul des croyances religieuses et magiques devant l'avancée des explications scientifiques. Weber introduit cette notion en 1904 dans *L'éthique protestante et l'esprit du capitalisme*, voyant dans ce processus une rationalisation croissante de l'existence. Pour lui, cette évolution signifie fondamentalement que « le fait de savoir ou de croire que, si on le veut, on peut à tout moment l'apprendre » et que « l'on peut en revanche maîtriser toute chose par le calcul ». Loin d'être positive, cette rationalisation représente une perte de sens et un déclin des valeurs dans les

modernisation et la bureaucratisation progressives transforment les relations sociales en systèmes calculables et prévisibles, mais elles détachent également l'individu des valeurs traditionnelles et symboliques qui structuraient auparavant la vie sociale. Cette rationalisation génère ainsi des tensions et un sentiment de perte de sens, contribuant à la complexité et à l'instabilité des rapports sociaux dans les sociétés modernes.

Le XXe siècle a vu se développer des approches plus spécifiquement centrées sur les dimensions discursives de la crise. L'École de Francfort, notamment avec Habermas (1973), a conceptualisé la crise comme une perturbation de la communication sociale, où les mécanismes de coordination entre les acteurs sociaux deviennent dysfonctionnels.⁶⁰ Foucault (1977-1978) a montré que les discours participent à la « gouvernamentalité moderne », en légitimant l'intervention étatique tout en façonnant des subjectivités conformes aux dispositifs de pouvoir. Par « gouvernamentalité », il entend l'ensemble des pratiques, stratégies et rationalités par lesquelles les États et les institutions orientent, régulent et encadrent les comportements des populations, au-delà de la seule contrainte juridique ou policière. Dans ce cadre, les discours constituent des instruments essentiels pour justifier les actions étatiques et pour produire des modes de pensée et de conduite alignés sur les objectifs du pouvoir.⁶¹

Plus récemment, les théoriciens du tournant linguistique ont approfondi cette approche en soulignant le caractère constitutivement discursif de la crise. Pour des penseurs comme Laclau et Mouffe (1985), la crise constitue un moment de dislocation hégémonique, où l'ordre symbolique établi devient vulnérable à la contestation et à la réarticulation. La crise ne se contente donc pas d'être reflétée par le discours ; elle se définit fondamentalement comme un phénomène discursif, produit et transformé par les interactions langagières et les luttes symboliques au sein de la société.

3. Les manifestations plurielles de la crise du discours

La crise contemporaine du discours se manifeste à plusieurs niveaux interdépendants. Sur le plan épistémologique, elle se traduit par l'effritement des grands récits de légitimation qui structuraient la modernité — le Progrès, la Raison, l'Émancipation. Comme l'analyse Lyotard, ce processus a entraîné une fragmentation des régimes de vérité et une prolifération de micro-récits concurrents.

Sur le plan politique, la crise du discours se manifeste par une défiance croissante envers les langages institutionnels et une montée en puissance de discours alternatifs, souvent nourris par les théories du complot et les épistémologies populistes. Cette dynamique révèle une remise en question profonde des autorités discursives traditionnelles.

Sur le plan communicationnel, la révolution numérique et l'avènement des réseaux sociaux ont profondément transformé l'écologie médiatique, générant une sphère publique fragmentée où coexistent des espaces informationnels parallèles et souvent imperméables. Cette mutation

sociétés modernes. Weber précise en 1917 dans *La profession et la vocation de savant* que ce désenchantement transforme profondément notre rapport au monde. Il souligne que désormais « il n'y a donc en principe aucune puissance imprévisible et mystérieuse qui entre en jeu ». Ce concept reste central pour comprendre les effets ambivalents de la modernité et de la rationalisation sur les sociétés contemporaines.

⁶⁰ Jürgen Habermas, *La Technique et la science comme « idéologie »*, traduit de l'allemand par Jean-René Ladmiral, Gallimard, 1990.

⁶¹ Michel Foucault, (2004a). *Sécurité, territoire, population* (1977-1978). La 4e leçon du cours « Sécurité, territoire, population » de 1977-1978 au Collège

technique accentue la crise des régimes de vérité et rend de plus en plus difficile l'émergence d'un consensus sur les faits fondamentaux.

4. Présentation des contributions : six éclairages sur la dialectique crise/discours

Les six articles réunis dans ce numéro explorent cette dialectique selon des angles variés mais complémentaires, couvrant un arc historique allant du XVIII^e siècle à la contemporanéité la plus immédiate.

L'étude de Douroub NASRAOUI, "Crise du discours de la vertu dans *Histoire de Madame de Luz* de Charles Pinot-Duclos", illustre de manière éclatante comment une crise des valeurs aristocratiques au XVIII^e siècle se traduit par une rhétorique pathétique et contradictoire. La vertu, autrefois fondée sur des certitudes métaphysiques, devient un discours en crise, tiraillé entre l'affirmation des principes et la réalité du désir. L'analyse met en lumière ce moment historique où le fondement transcendant des normes morales commence à vaciller, annonçant la crise moderne des grands récits.

Dans une perspective similaire, l'article de Hajer MESTAYSSER, "La crise de valeurs dans la comédie à la fin du XVIII^e siècle", montre comment le théâtre post-moliéresque fait écho à une mutation socio-économique profonde. La comédie devient le laboratoire où se joue et se dit la crise des valeurs, utilisant la satire pour révéler l'effritement des anciens repères moraux au profit de l'intérêt matériel - une transformation que Weber aurait qualifiée de "désenchantement du monde". Le discours théâtral apparaît ainsi comme le miroir et le catalyseur d'une transformation anthropologique majeure.

L'article de Salwa HANBLI, "La crise dans le discours politique : analyse pragma-linguistique des tweets des leaders mondiaux face à la pandémie de COVID-19", offre une plongée au cœur de la crise sanitaire contemporaine. Par une analyse comparative des tweets d'Emmanuel Macron et de Kais Saied, l'étude révèle comment les plateformes numériques deviennent l'arène où se jouent de nouvelles formes de légitimation politique en contexte de crise. Elle met en lumière la tension entre rationalité républicaine et symbolisme souverainiste, montrant comment Twitter fonctionne à la fois comme espace de condensation discursive et d'exposition aux tensions communicationnelles.

À l'époque contemporaine, la contribution de Malika GUEDDIM, "Lucidité postcoloniale ou continuité stratégique ? Analyse communicationnelle du discours d'Emmanuel Macron sur l'Afrique", applique une grille foucaldienne pour décrypter un "discours de crise" géopolitique. Il s'agit moins ici d'une crise subie que d'une crise d'influence, que le discours présidentiel tente de résoudre par une performativité calculée, mêlant empathie et fermeté lexicale. L'analyse révèle les stratégies discursives par lesquelles le pouvoir tente de reconquérir une hégémonie perdue dans un contexte postcolonial.

Sur un plan plus existentiel, l'analyse de Mohamed MTIRI, "L'ironie du sort" dans "Le Lanceur de dés" de Mahmoud Darwich", aborde la crise identitaire comme une crise de la parole poétique elle-même. Le poète palestinien interroge la possibilité même de dire son identité, incarnant ainsi la condition postmoderne d'un sujet éclaté, dont le discours ne peut que capturer une vérité partielle et ironique. La crise identitaire devient ici le révélateur des limites du langage à dire l'être.

Enfin, l'article de Moussa SLEIMIA, "La modalité d'obligation ou la crise du discours", offre un cadre linguistique rigoureux à cette problématique générale. En se concentrant sur la

modalité d'obligation, il montre comment la crise communicationnelle s'incarne dans la matérialité même de la langue, transformant l'échange en un rapport de force où le pouvoir s'exerce dans la contrainte linguistique. Cette approche micro-linguistique complète admirablement les macro-analyses proposées par les autres contributions.

5. Perspectives méthodologiques et enjeux contemporains

La diversité des approches méthodologiques représentées dans ce numéro témoigne de la fécondité interdisciplinaire du paradigme “discours de crise/crise du discours”. L'analyse littéraire, la sociologie du discours, la linguistique de corpus, l'analyse critique du discours et la poétique se trouvent convoquées pour éclairer les multiples facettes de cette problématique.

Cette diversité méthodologique répond à un impératif théorique fondamental : la complexité des phénomènes de crise exige une pluralité d'approches capables d'en saisir les dimensions à la fois linguistiques, sociales, politiques et psychologiques. Comme l'ont montré les travaux de Van Dijk (2014) sur la cognition sociale, la crise n'est pas seulement un fait objectif, mais une construction mentale et collective qui engage des représentations, des croyances et des schémas interprétatifs.

Les enjeux contemporains rendent cette réflexion plus urgente que jamais. À l'ère de l'Anthropocène⁶², des transformations numériques accélérées et des reconfigurations géopolitiques majeures, la question des discours de crise et de la crise du discours devient centrale pour comprendre les défis de notre temps. La montée des populismes, la crise climatique, les pandémies globalisées et les mutations des écosystèmes médiatiques créent un contexte où la capacité à produire des discours sensés sur la crise devient elle-même un enjeu crucial.

6. Conclusion : pour une épistémologie des crises

Ensemble, ces textes témoignent de la vitalité du cadre “discours de crise/crise du discours”. Qu'elle soit morale, politique, identitaire ou linguistique, la crise est toujours affaire de langage - et le langage, toujours susceptible d'être en crise. En croisant les approches littéraires, politiques et linguistiques, cette contribution invite à penser la crise non comme un dehors du discours, mais comme son ombre portée, son double problématique, et son lieu de reconfiguration permanente.

Au-delà de la diversité des objets et des méthodes, une conviction commune anime ces articles : l'étude des discours de crise et de la crise du discours n'est pas un champ académique parmi d'autres. Elle constitue une voie d'accès privilégiée pour comprendre les métamorphoses de nos sociétés et les défis auxquels elles sont confrontées. Dans un monde où la capacité à produire du sens collectif est elle-même en crise, cette réflexion sur les conditions de possibilité d'un discours sensé sur la crise représente un enjeu à la fois théorique et éminemment pratique.

⁶² L'Anthropocène désigne une nouvelle ère géologique où l'humanité est devenue une force géologique majeure. Ce terme, formé à partir des mots grecs *anthropos* (humain) et *kainos* (nouveau), souligne notre capacité à modifier durablement le climat, les sols et les écosystèmes. Il se manifeste par le réchauffement climatique, la pollution généralisée et l'érosion de la biodiversité. Les scientifiques débattent de son point de départ, certains le situant à la révolution industrielle, d'autres au milieu du XX^e siècle avec l'accélération soudaine de la consommation et des impacts environnementaux. Cette notion cristallise ainsi la prise de conscience que les activités humaines transforment en profondeur le système terrestre.

La crise n'est peut-être plus l'exception, mais la condition normale des sociétés contemporaines. Dès lors, apprendre à lire les crises dans les discours, et les crises des discours, devient une compétence intellectuelle et citoyenne essentielle. C'est à cet apprentissage que ce numéro espère contribuer, en montrant comment l'analyse rigoureuse des textualités peut nous aider à naviguer dans l'incertitude et la complexité du monde contemporain.

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Crise du discours de la vertu dans *Histoire de Madame de Luz* de Charles Pinot-Duclos : ombres et lumières des femmes vertueuses

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Résumé

Cette étude s'attache à analyser la crise du discours de la vertu dans *Histoire de Madame de Luz* de Charles Pinot-Duclos, où la figure féminine vertueuse se trouve en tension entre les exigences morales et les élans du désir. Dans une société aristocratique marquée par la frivolité et la décadence, la vertu devient un fardeau tragique, voire un préjugé, que les héroïnes portent jusqu'à l'abnégation. Madame de Luz, incarnation pathétique d'une sensibilité féminine refoulée, oppose à la violence symbolique de son temps une probité douloureuse, qui la condamne à l'isolement, voire à la mort. Le récit met ainsi en lumière la complexité des normes sociales, les contradictions du discours moral, et la tension constante entre liberté individuelle et assignations collectives.

Mots-clés: Libertinage, discours, crise, Régence, Aristocratie, désir, vertu

Abstract

This study seeks to analyze the crisis of the discourse of virtue in *Histoire de Madame de Luz* by Charles Pinot-Duclos, where the virtuous female figure is caught between moral obligations and the impulses of desire. In an aristocratic society marked by frivolity and decadence, virtue becomes a tragic burden — even a prejudice — that heroines bear to the point of self-denial. Madame de Luz, a poignant embodiment of repressed feminine sensibility, opposes the symbolic violence of her time with a painful integrity that ultimately condemns her to isolation, even death. The narrative thus highlights the complexity of social norms, the contradictions of moral discourse, and the constant tension between individual freedom and collective constraints.

Keywords: Libertinism, discourse, crisis, Régence, aristocracy, desire, virtue

1. Introduction

“De quoi s’agit-il, en fait ? De la vie d’une femme qui place la vertu dans la chasteté et la fidélité à ses devoirs d’épouse et que le destin conduit au déshonneur, à la honte et finalement à la mort sans pardon ni vengeance.” (Duclos, 1982, p. xx)

Dans le royaume d’Henri IV, une époque où la vertu féminine fut à la fois célébrée et mise à l’épreuve, se dressa le portrait d’une dame chaste et fidèle à son rang de femme mariée. Madame de Luz fut une baronne d’une beauté éclatante et d’une intégrité sans faille. Tout en incarnant l’idéal féminin de la bienséance et de la retenue, elle cacha dans les replis de son âme une passion secrète mais innocente et authentique pour le marquis de Saint-Géran. Un amour inavoué qu’elle s’efforça d’oublier, refusant de céder aux élans du cœur. Le destin, implacable, frappa quand son mari fut impliqué dans un complot mené par le maréchal Biron qui visa à renverser Henri IV. Une fois arrêté, le baron de Luz fut menacé d’être décapité. Madame de

Luz croyant fermement en l'innocence de son mari, intervint auprès d'un des juges du procès. Thurin fut un libertin de qualité à travers ses harangues captieuses et ses emphases désarmantes. Il finit par faire céder la baronne à ses avances, après une dure résistance.

Lorsqu'elle céda à Thurin pour sauver son mari- en se livrant à lui sous chantage- elle ne transgressa pas par caprice de désir, mais par devoir. Ce sacrifice la plongea dans un sentiment de honte irréparable. Cruelle est cette mondanité, quand Mme de Luz compte s'en retirer pour sauver le reste de sa dignité, elle sera une fois de plus trahie par son confesseur M. Hardouin censé la consoler et la purifier. Doublement déshonorée dans sa chair et dans son esprit, madame de Luz subit une pluralité de viols physiques et symboliques mettant à nu les injustices de cette société patriarcale qui la condamne en la punissant, sévèrement et sans bruit. En refusant de vivre déchue et sans repère moral et affectif, madame de Luz choisit la mort comme ultime affirmation de son intégrité. Cette fin tragique est une dénonciation silencieuse de tout ordre d'épreuves qui ébranlent sa vertu. Il s'agit de l'histoire de la femme chaste qui a commis un péché dont elle ne se remettra jamais. Le contexte historique et social est important ici, car l'œuvre se déroule dans une société aristocratique où la morale et l'honneur jouent un rôle primordial dans la hiérarchie sociale répondant ainsi à une loi contractuelle entre les sexes au sein d'une subjectivité amoureuse qui a marqué siècle et gens du Siècle. L'idée de la vertu féminine, à la fois norme complexe et idéal compliqué, devient un terrain de compréhension ambiguë des intentions vue l'intrication des codes préconisés à cette mondanité dont les relations sont entremêlées ou imbriquées et souvent difficile à démêler.

Il s'agit aussi de l'histoire de cette aristocratie où la vertu fut un ridicule bourgeois qui ne fit pas honneur à une femme de grande renommée. La droiture inflexible de ces femmes sensibles qui, contrairement à l'éthique d'une époque qui reposa sur des principes dissipés, témoigne de leurs attitudes toujours pondérées se défendant ainsi de goûter aux fruits les plus exquis de ces amours interdites. Et vu leurs statuts de femmes mariées, elles se contentèrent de laisser échapper des sentiments flegmes et calculés à l'égard de ces fats, petits-maîtres et roués toujours emportés par la fougue des passions passagères et légères.

Il en découle une pluralité de questionnements sur les jeux de séduction et les enjeux de cette vertu toujours conçue comme un idéal de probité mais voulant échapper à cette définition archaïque, afin d'embrasser l'éthique sociale de l'époque. Le roman interroge la notion même de la vertu, notamment celle de la femme et de la gente masculine aussi. En effet, Madame de Luz semble incarner la vertu classique, mais elle est aussi confrontée à des dilemmes et des contradictions qui la placent dans une situation de crise voire de culpabilité face à sa vertu exagérée. A ce propos, l'on se demande alors en quoi l'œuvre de Duclos, en abordant le thème de la vertu féminine, elle met en crise le discours traditionnel sur la vertu. Et quels sont les aspects ambivalents qui nuancent cette notion dans le roman. Et dans quelle mesure on peut considérer Mme de Luz comme l'exemple d'une femme vertueuse, mais prise dans des dilemmes qui remettent en question sa propre vertu. Il s'agit aussi d'interroger l'exemplarité de cette probité féminine et les tensions liées à son rôle social et moral dans un contexte bien déterminé. La vertu s'avère-t-elle un idéal moral ou une construction sociale destinée à maintenir l'ordre aristocrate à travers des apparences de probité cachant ainsi une réalité sociale qui regorge d'hypocrisie ?

Notre analyse se divise en deux parties principales: tout d'abord, nous analyserons les jeux de séduction et les enjeux de cette mondanité de l'époque afin d'insérer le sujet dans son contexte et y révéler mœurs séculaires et attitudes. Puis, nous étudierons la manière dont Duclos met en crise cette conception traditionnelle de la vertu féminine à travers ses personnages et notamment par le biais de cette casuistique amoureuse de la femme vertueuse, dont la rhétorique

révélant à la fois le grand pouvoir sur soi d'autant plus le drame de cette probité féminine estimée exagérée, Mme de Luz en l'occurrence. Et nous examinerons les ambiguïtés et les tensions qui marquent la représentation des femmes vertueuses, entre ombres et lumières, à travers les figures de ces fats et scélérats qui ne transgressent pas le code de la dissipation mais s'y identifient.

2. Jeux de séduction, mondanité et crise du discours de la vertu

Si au XVIII^e siècle la vertu féminine a été définie selon un modèle strict et rigide hérité des traditions chrétiennes et de la morale aristocratique, c'est parce qu'elle a été fondée sur des valeurs telles que la douceur, la chasteté, la fidélité et la soumission. C'est ainsi que la femme vertueuse est a été perçue comme un modèle de réserve et de pureté. C'est quand la réputation est intimement liée à son comportement moral. Dans cette société, la vertu devient un instrument de pouvoir social et personnel: elle détermine la place de la femme dans la hiérarchie et conditionne son mariage, son statut et son influence. Ceci est dit, mais dans un contexte où l'aristocratie régna par ses airs de vanité et par des attitudes de frivolité, le système social se définit désormais ainsi :

Aussitôt qu'une femme paraît à la Cour, son mari semble être la personne qui lui convient le moins. Ceux qui n'ont point encore de commerce réglé viennent offrir leurs soins. Les amants déjà pourvus veulent du moins en être les médiateurs. On consulte particulièrement les convenances de société ; et, si l'on peut, le repos du mari et le goût de la femme. (Duclos, 2001, p. 32)

La cour devient donc un espace de commerce amoureux où les alliances subjectives sont fluctuantes et où les rôles sont constamment imposés en fonction des convenances sociales telles qu'elles ont été conçues par la mondanité. Dans un contexte pareil, où les contraintes sociales s'estompent au profit d'un libertinage mondain fondé sur les jeux de séduction et l'épanouissement inconditionnel des désirs, le "repos" du mari n'est qu'une forme de tranquillité légitimée par ce groupe social. C'est ainsi que "goût de la femme" ne désigne pas un véritable épanouissement émotionnel mais plutôt l'ensemble des jeux de séduction.

Les propos cités supra sont prépondérants à maints égards surtout que la citation offre une réflexion, ironique certes, mais très véridique sur les rapports amoureux et notamment conjugaux dans la société aristocratique du XVIII^e siècle. Il s'agit de mettre en lumière les tensions entre désir individuel et conventions sociales. A travers ce postulat, Duclos met en évidence les mécanismes de l'amour à la Cour, en soulignant la superficialité et les artifices des relations sociales qui régissent ces espaces de pouvoir et de statuts. Ce constat met à nu le caractère performatif du mariage au XVIII^e siècle, où l'union conjugale n'est considérée que comme un moyen d'affirmation et d'ascensions sociales. En d'autres termes, des unions libres où les vrais désirs se réalisent derrière des façades d'unions sociales d'apparences bien solides.

Dans son introduction de *l'Histoire de Madame de Luz*, Jean Dizien cite Emile Henriot qui parle de l'extrême liberté qui fait l'agrément de la vie de cette époque- un délicieux et dangereux épicurisme gouverne les mœurs. Si l'ordre y perd, "l'esprit y gagne- et jamais il ne fut plus vif, plus délié, plus apte à s'assimiler toutes les nouveautés, à saisir toutes les faces les plus diverses de la mobile vérité" (Duclos, 2001, pp. 7-8).

Il s'agit entre autres de ce phénomène d'amour conjugal décrié et qui reflète véritablement les jeux de séduction de l'époque, où la figure du mari a été considérée plutôt comme une fonction sociale plus qu'une relation affective. En témoignent les propos suivants qui disent long sur ces unions libres où la fidélité a été considérée comme une atteinte au statut d'une femme de renommée :

N'avons-nous pas à la Cour une estime singulière pour les amants, dont le commerce est fondé sur une passion que la confiance rend respectable. De tels amants sont plus estimables que des époux que les lois forcent de vivre ensemble ; car il faut qu'une passion, toujours heureuse et toujours constante, soit fondée sur des qualités supérieures, et sur une estime réciproque. (Duclos, 2001, p. 43)

Le mariage s'avère à ce propos un tremplin pour une vie plus affranchie en matière de relations illégitimes. Il n'est nullement un obstacle à la jouissance des amants, car la vraie mondanité ne se reconnaît que dans les intrigues⁶³. Dans ce contexte, ce sont les jeux de pouvoir qui sont plutôt privilégiés au détriment de toutes idéologies émotionnelles, car tout se joue entre courtisans et prétendants en perpétuelle recherche d'un désir toujours renouvelé et jamais assouvi. C'est ainsi qu'amants et courtisans, loin de sombrer dans une sorte de subjectivité fidèle et intime, préfèrent servir la construction des convenances sociales répondant ainsi à un idéal d'équilibre social. Au sein de cette subjectivité amoureuse du siècle, où les maîtres-mots sont "désir" et "goût", se dresse tout un bilan contre amour authentique où la vertu n'est qu'illusion. La femme, quant à elle, se définit désormais dans sa conformité aux attentes sociales et aux transactions affectives. Les propos suivants illustrent avec brio le mécanisme des rapports entre les sexes :

Si le commerce de deux amants n'était pas innocent, aurait-on imaginé de leur imposer des devoirs ? Cependant les amants ont les leurs comme les époux, ils en ont même de publics, et que les personnes mariées ne peuvent pas s'empêcher d'approuver. (Duclos, 2001, p. 43)

Dans *Histoire de Madame de Luz*, cette vertu classique est au cœur de l'intrigue et de la caractérisation des personnages. Madame de Luz incarne le modèle de la femme vertueuse, mais ce modèle se trouve mis à l'épreuve par les événements qui jalonnent sa vie. Duclos décrit une femme d'une grande moralité, mais qui n'échappe pas aux tentations et aux faiblesses humaines. Ainsi, la vertu n'est pas un état de grâce permanent mais un idéal sans cesse menacé, qui repose sur un équilibre fragile entre devoir moral et désirs personnels mais particulièrement le désir du groupe social. Ce personnage met en lumière les exigences d'une minorité envahissant les mœurs de l'époque et dont la quête primordiale et ultime est celle de dénigrer cet idéal de pureté et de probité féminines.

⁶³ Un exemple frappant avancé par Duclos dans *Histoire de Madame de Luz* et qui témoigne davantage de ces ordres de mœurs dissolues où le commerce des relations extraconjugales fut la règle du Siècle et ne fit pas une exception étrange à cette mondanité : "Voyez, par exemple, le Chevalier de Sourdis ; il a été à la mort ; Madame de Noirmoutier, par une discrétion mal entendue, n'osait pas aller le voir. Monsieur de Noirmoutier, qui n'ignore pas leur liaison, a été le premier à conseiller à sa femme de rendre à son ami ce qu'elle lui devait, sans quoi elle ne donnerait pas bonne idée de son cœur. Elle n'a plus quitté son amant pendant tout le cours de sa maladie : elle a été généralement approuvée, et le Roi lui en a su bon gré" (Duclos, 2001, pp. 43-44).

3. La rhétorique de la crise : ambiguïté et tensions internes des femmes vertueuses

Charles Pinot-Duclos a promené le miroir le long du chemin où sensibilité féminine et subjectivité amoureuse s'entrelacent dans un jeu de séduction et selon des lois contractuelles et ce, à travers des structures discursives attestées par un ordre bien déterminé, à savoir la mondanité. Madame de Luz, figure féminine tragique, mobilise ainsi un discours imprégné d'une rhétorique pathétique pour légitimer ses choix individuelles face aux attentes sociales. L'éloquence de Madame de Luz, oscillant entre probité et manipulation, fait preuve davantage de cette dualité entre liberté individuelle et normes collectives. "Peut-être le thème du livre est-il : le bonheur, ici-bas, n'est pas la récompense de la vertu" (Duclos, 2001, p. 16), pour citer Jean Dizien. En témoigne d'ailleurs la première phrase du roman : "Il semble que la vertu d'une femme soit dans ce monde un être étranger, contre lequel tout conspire. L'Amour séduit son cœur. Elle doit être en garde contre la surprise des sens" (Duclos, 2001, p. 23).

Madame de Luz (Luz=lumière) est une femme inaccessible à la séduction mais qui, en dépit de sa vertu, a été déshonorée à maintes reprises par des faits insensés et des scélérats niais et dépourvus d'honneur. En pleine subjectivité de l'amour, incarnée par une mondanité enfermée dans ses principes dégradés, ces femmes vertueuses, dont Duclos a pris certes la défense, ont été toujours représentées comme des êtres assujettis et affaiblis par leurs passions jugées par elles-mêmes comme indignes et prohibées. A cet effet, elles se laissèrent ronger par des drames de sentiments qui préparaient décidément leurs fins fatales. Quand la vertu se contredit avec les lois naturelles du désir, elle leur devient un préjugé et un attachement exagéré et inouï.

Nous démontrerons, à travers cette rhétorique des femmes vertueuses, la crise du discours de la vertu. Il s'agit d'un discours plutôt pathétique incarné par des attitudes et propos lugubres et sombres allant jusqu'au choix de la mort comme une sorte de répit. Jean Dizien n'a pas manqué de souligner ce processus dramatique qui a marqué la vie de Mme de Luz, elle, qui n'a pas choisi de se retirer dans des terres lointaines mais plutôt de quitter le monde ici-bas vers des cieux plus justes :

La fin de Mme de Luz est plus terrible, en tout cas plus radicale que celle de la Princesse de Clèves. Pas de retraite loin du monde pour soigner ses blessures, pas d'oubli progressif de la passion. Le Ciel étant le principal ennemi de leur bonheur, Mme de Luz et Monsieur de Saint-Geran se devaient de lui réclamer quelques explications. (Duclos, 2001, p. 19)

En fuyant une passion ardente susceptible d'entacher leur dignité, ces femmes ne font que sombrer dans une peine morbide. Ne s'agit-il pas de ce choix délibéré du "repos"⁶⁴ pour ces femmes vertueuses ? M. de Saint-Geran, l'ami du cœur de Mme de Luz, l'amoureux et le seul qui ait pu allumer le feu de sa passion ne fut pas exempt de ce jeu de séduction. Car, de cette conduite flegme et exagérée d'une femme engagée et aspirant toujours à être attachée à ses devoirs de femme mariée, naissait une passion vive et inébranlable. Nous citons l'une des déclarations les plus révélatrices de ce jeu de contradiction entre passion illégitime et vertu rigoureuse :

Des idées tendres et délicates l'occupèrent pendant quelque temps ; mais en amour il suffit d'obtenir pour prétendre. Il y a un terme pour lequel l'amant soupire, vers lequel il

⁶⁴ "Repos" est un terme très redondant dans le roman : on l'a bien opéré depuis la première entrevue entre Mme de Luz et Saint-Geran. Le repos ne serait qu'une forme de renoncement à la fougue des passions auxquelles Mme de Luz se sent incapable de résister. Néanmoins le choix du repos n'a pas été toujours pour elle un choix délibéré...

se porte ; même en protestant, même en croyant le contraire. Monsieur de Saint-Geran, en admirant la vertu de Madame de Luz, faisait tous ses efforts pour la séduire. (Duclos, 2001, p. 42)

En fait, St-Geran, tout en prônant les valeurs sociales, semble en être à la fois le prisonnier et le défenseur. Ses propos sur la morale, sur l'honneur et sur la fidélité donnent l'impression de suivre un code moral strict. Cependant, derrière cette façade se cache souvent un homme qui se conforme aux normes par intérêt social plutôt que par conviction profonde. Il s'agit de cette attitude performative des valeurs sociales et séculaires. Et les exemples ne manquent pas dans le roman et qui révèlent cet ordre hyperbolique du discours du jeune séducteur face à une femme dont les principes d'honneur sont inébranlables : “- Oui, Madame, répondit Monsieur de Saint-Geran ; oui, vous me rendez justice ; je vous serai toujours inviolablement attaché ; ma passion sera toujours pour vous la plus vive, et la plus pure” (Duclos, 2001, p. 41).

Suite à cet aveu d'attachement et d'inclination, Monsieur de Saint-Geran, “en prononçant ces paroles, se jeta aux pieds de Madame de Luz, et lui baisa la main. Il s'en fallait peu qu'en lui protestant de la pureté de ses feux il ne lui donnât des preuves du contraire. Madame de Luz elle-même, plus occupée du discours, qu'attentive à l'action de Monsieur de St-Géran, en recevant ces protestations, ne pouvait se défendre d'un plaisir secret qu'elle ne démêlait qu'imparfaitement, et qui fait le charme sans alarmer l'innocence” (Duclos, 2001, p. 41).

Dans les différents propos de Mme de Luz, la casuistique amoureuse se manifeste par ses différentes tentatives de modeler son amour au gré des attentes sociales. Elle se trouve constamment et volontairement dans une position où elle doit justifier ses désirs en fonction des normes de son époque et non selon ses propres émotions. Le mot “secret” est un mot clé qui régit l'univers ambivalent de ces femmes tiraillées entre désir et devoir. S'en fait écho dans ce portrait brossé par Duclos lui-même là où le lexique du secret et de la dissimulation sont les meilleurs témoins de ce dilemme rongé par une âme pure mais toujours dure dans le devoir :

Madame de Luz même, née avec la vertu la plus pure ; attachée à ses devoirs, et craignant les suites d'un pareil engagement, n'était pourtant pas encore aussi affligée qu'interdite. Elle ne pouvait plus se dissimuler ses propres sentiments pour Monsieur de Saint-Geran. Elle sentait combien il lui était cher. Il aurait été trop humiliant pour elle d'aimer seule. Elle venait de connaître toute la passion de Monsieur de Saint-Geran. Ainsi, quoiqu'elle redoutât le danger où elle allait être exposée, en vivant aussi intimement avec lui ; quoiqu'elle eût fait tous les efforts pour s'en séparer, elle ressentait involontairement un plaisir secret. (Duclos, 2001, p. 42)

Madame de Luz se trouve en proie à un trouble intérieur très profond du moment où le sentiment amoureux a fait irruption dans une conscience gouvernée par l'honneur et la vertu. Le lexique employé trahit la complexité de cette progression affective par une lente dissolution de cette dissimulation de soi et l'apparition d'un “plaisir secret”. D'ailleurs, le verbe pronominal “se dissimuler” renvoie à une forme de refus de soi et de tout ce qui germe au fond de sa conscience. Et la forme négative n'est qu'une affirmation de l'effondrement de ce mécanisme de défense là où émotions se transforment en illusions. Madame de Luz passe de l'effort de dissimulation à l'acceptation de ce plaisir secret signe d'un bouleversement et d'une tension entre morale et vérité intérieure.

Dans son discours toujours imprégné de souffrance et de crainte, Mme de Luz fait souvent référence à une inquiétude qui ronge son âme et son esprit ; mais ne dégradant en rien ses émotions. Toutefois, elle accepte cette répression comme étant nécessaire pour préserver sa dignité. Ainsi, l'amour et la passion ne sont pas des moteurs personnels pour elle, mais plutôt

des éléments subordonnés à des impératifs sociaux. Voici une confession imprégnée de remords et de contradictions là où on peut souligner un recours remarquable au champ lexical de l'amour et de la vertu. Toutefois, la dénomination plaisir et désir apparaissent mais toujours dans le contexte de la crainte et de la méfiance de ces sensations susceptibles de nuire et de faire égarer une âme repentie :

Je vous aime, je ne prétends point vous le cacher, je ressens même du plaisir à vous le dire ; mais n'attendez rien de moi qui soit contraire à mon devoir. Je veux croire même que vous ne m'avez jamais fait l'injure de l'espérer. Je veux que mon honneur vous soit aussi cher qu'à moi-même ; et j'ai plus de confiance dans la fidélité de votre amitié, que de crainte de la vivacité de vos désirs. (Duclos, 2001, p. 41)

En effet, une attitude pareille de résistance d'une femme vertueuse, craignant la souillure de sa réputation ne pourrait qu'attiser le désir masculin, le rallumer de mille feux au point de ne le laisser songer qu'à atteindre ses desseins. Ceci justifie d'ailleurs la complexité des lois contractuelles allant jusqu'à une sorte de violence coercitive à travers des propos licencieux et dédaigneux de ces fats et roués. Monsieur Thurin et le prêtre Hardouin dont les desseins de la séduction étaient des plus vils et bas sont les meilleurs exemples qui illustrent ces ordres dédaigneux d'une société où la magistrature arriviste et la religion hypocrite ne font qu'incarner ambitions scélérates et désirs mesquins. Et les scènes de viols et de perfidies masculines ne manquaient pas dans l'histoire de Madame de Luz préparant ainsi la fin tragique de cette femme probe, fière et imposante dans sa résistance à toutes les tentatives de séduction. Il s'agit d'une mise en lumière de ce caractère féminin aux facettes heureuses, lugubres et nuancées ; et qui oscillent entre l'ombre et la lumière, mettant en avant la complexité de leur humanité.

Duclos a brossé le portrait d'une âme féminine d'une grande moralité, mais qui n'échappe pas aux tentations et aux faiblesses humaines. Ainsi, la vertu n'est pas un état de grâce permanent mais un idéal sans cesse menacé, qui repose sur un équilibre fragile entre désirs individuels et exigences morales. Le libertin moraliste qui est Duclos a déjà soulevé dès les premières lignes de son récit cette problématique d'une vertu conçue comme "étrange" et "si difficile à soutenir":

Quels sont donc les avantages d'une vertu si difficile à soutenir ? Etrange condition que celle d'une femme vertueuse ! Les hommes la fuient, ou la recherchent peu. Les femmes la calomnient ; et elle est réduite comme les anciens stoïciens, à aimer la vertu pour la vertu seule. (Duclos, 2001, p. 23)

4. Conclusion

Dans *Histoire de Madame de Luz*, Duclos s'attache à mettre en lumière les apories du discours moral traditionnel, en particulier lorsqu'il s'applique à la vertu féminine. Sous sa plume, la vertu cesse d'être cette figure idéalisée, figée dans une perfection inatteignable, pour se révéler comme un idéal mouvant, empreint de complexité et d'humanité. Il s'agit moins, pour l'auteur, de célébrer une vertu abstraite que de dénoncer les violences symboliques qu'elle engendre lorsqu'elle devient norme absolue et contrainte sociale.

Madame de Luz incarne ainsi la tension tragique entre un modèle vertueux imposé de l'extérieur et les élans d'une sensibilité propre, lucide, profondément humaine. Par ce biais, Duclos ne se contente pas de peindre les affres d'un destin individuel ; il dresse un réquisitoire subtil contre les attentes démesurées que la société – et plus particulièrement l'aristocratie – fait

peser sur les femmes. La vertu, loin d'être une qualité intérieure, devient ici une posture sociale, un masque exigé, sous peine d'exclusion ou de réprobation.

Le récit prend alors la forme d'une critique douce-amère des hypocrisies morales de cette époque complexe et compliqué, où l'apparence prévaut sur la vérité des sentiments, et où les normes vertueuses servent davantage à préserver l'ordre établi qu'à élever l'âme. En interrogeant la légitimité même de ces valeurs, Duclos adopte une posture de moraliste éclairé, refusant le manichéisme pour lui préférer une éthique de la nuance, du doute, et de la compréhension.

Ainsi, *Histoire de Madame de Luz* ne se lit pas seulement comme un portrait de femme injustement sacrifiée sur l'autel de la vertu, mais comme une réflexion plus vaste sur la nature de la vertu elle-même : non pas un absolu à imiter, mais une quête intérieure, fragile, toujours en tension entre la liberté individuelle et les normes sociales : "La fatalité, c'est encore ce confesseur perfide devant qui elle n'aura tout de même pas à céder." Duclos n'est pas Sade. Il n'a nullement envie d'allonger le catalogue des viols. La droiture inflexible de Madame de Luz semble pourtant donner raison à Sade : "la vertu ne sert à rien dans le monde" (Duclos, 2001, pp. 18-19).

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La crise de valeurs dans la comédie à la fin du XVII^e siècle

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Résumé

Cet article analyse la crise de valeurs dans la comédie post-moliéresque à la fin du XVII^e siècle, notamment à travers les œuvres de Dancourt et Lesage, pour montrer comment le théâtre reflète et critique les mutations socio-économiques de son époque. En exposant une société dominée par l'avidité, la spéculation et l'ascension de la bourgeoisie financière, ces dramaturges mettent en scène une crise de valeurs où les rapports humains sont régis par l'intérêt matériel. Par son mélange d'ironie et de satire, la comédie devient un lieu d'expérimentation et de témoignage, révélant la complexité d'une époque en pleine transformation.

Mots-clés: comédie post-moliéresque, crise des valeurs, bourgeoisie, mutations socio-économiques, satire

Abstract

This article analyzes the crisis of values in post-Molière comedy at the end of the 17th century, focusing on the works of Dancourt and Lesage, to demonstrate how comic theatre reflects and critiques the socio-economic changes of its time. By portraying a society dominated by greed, speculation, and the rise of the financial bourgeoisie, these playwrights stage a crisis of values where human relationships are governed by material interests. Through irony and satire, comedy becomes a space of experimentation and testimony, revealing the complexity of an era undergoing profound transformation.

Keywords: post-Molière comedy, crisis of values, bourgeoisie, socio-economic changes, satire

1. Introduction

À la fin du XVII^e siècle, la comédie post-moliéresque connaît un vif succès, notamment grâce à sa capacité à traduire et à exprimer les préoccupations sociales et économiques de son époque. Dancourt et Lesage comptent parmi les figures emblématiques qui ont su intégrer dans leurs créations théâtrales les effets dévastateurs des pratiques spéculatives, dans un contexte marqué par une profonde crise économique. Parmi leurs œuvres marquantes, on peut citer *La Folle Enchère* (1690) (Dancourt, *La Folle Enchère*, consultable sur Gallica, en ligne sur Théâtre), *Les Bourgeoises à la mode* (1693) (Dancourt, *Les Bourgeoises à la mode*, in *Œuvres de théâtre*, tome I, Genève, Slatkine Reprints, 1968) et *Turcaret* (1709) (Lesage, *Turcaret*, Paris, Éditions GF Flammarion, 1998). Ces deux dramaturges ont exploré les tensions entre les classes sociales ainsi que les profondes mutations engendrées par l'ascension de la bourgeoisie financière et par les nouvelles pratiques mercantiles, brossant ainsi un portrait critique et satirique de la société de leur temps.

Dans cet article, nous chercherons à mettre en lumière la manière dont le discours comique se transforme en discours-témoignage sur un moment de crise. Pour ce faire, nous organiserons

notre réflexion en trois grandes parties : dans un premier temps, un état des lieux, où nous définirons le corpus et présenterons la méthode d'analyse retenue ; dans un second temps, nous examinerons comment la crise des valeurs est exposée dans le discours comique. Enfin, nous analyserons l'impact des mutations socio-économiques sur le discours.

2. État des lieux

2.1 Description du corpus

Le corpus que nous tâcherons d'étudier dans cet article se compose principalement des œuvres comiques de la fin du XVII^e siècle, avec un focus sur les pièces de deux dramaturges : Dancourt et Lesage. Parmi les textes retenus figurent *La Folle Enchère* (1690) et *Les Bourgeoises à la mode* (1693) de Dancourt, ainsi que *Turcaret* (1709) de Lesage. Ces œuvres sont représentatives d'une période charnière du théâtre comique post-moliéresque, où se manifeste une nouvelle sensibilité aux bouleversements sociaux et économiques de l'époque.

Ces pièces mettent en scène des personnages issus de différentes classes sociales : roturiers, bourgeois, serviteurs, et illustrent l'émergence d'une société dominée par l'esprit mercantile, la spéculation et le jeu. Leurs discours et intrigues traduisent l'évolution des mœurs, dévoilant les tensions entre les valeurs traditionnelles et les nouvelles exigences d'une époque marquée par croissance importante de l'argent et son influence sur les relations humaines.

Ainsi, le corpus choisi permet de saisir les mutations idéologiques et socio-économiques à travers un prisme dramatique qui allie comique et satire, révélant la complexité d'un moment historique de transition entre deux mondes.

2.2 La Méthodologie

Pour analyser ce corpus, l'approche que nous adoptons repose sur la sociopoétique qui représente "un champ d'analyse qui, nourri d'une culture des représentations sociales comme avant-texte, permet de saisir combien celui-ci participe de la création littéraire et d'une poétique" (Montandon, 2016, p. 2).

D'une part, l'analyse textuelle approfondie des pièces permet d'identifier les procédés comiques ainsi que les dynamiques narratives qui contribuent à mettre en lumière la crise des valeurs et les transformations sociales. D'autre part, l'intégration du contexte socio-économique est essentielle pour comprendre la genèse et la fonction des représentations théâtrales, notamment en rapport avec l'essor d'une éthique marchande qui régit les rapports humains.

Par ailleurs, la réflexion s'appuie sur des références théoriques majeures. Parmi celles-ci, les travaux de Pierre Bourdieu sur la relation entre discours, pouvoir et idéologie apportent un cadre pour décrypter la manière dont la comédie morale se trouve "contaminée" par les discours économiques naissants. Les analyses de Gisèle Sapiro permettent de situer le théâtre comique dans son époque, en soulignant son rôle de reflet des idéologies dominantes et des représentations sociales.

Enfin, les contributions de Martial Poirson et Anne Michel enrichissent la compréhension du théâtre économique et de la portée critique de personnages comme Turcaret, tandis que les citations de Balzac, même postérieures, offrent une perspective historique et littéraire sur la continuité et la transformation des représentations de la bourgeoisie.

Cette méthode interdisciplinaire garantit une lecture nuancée des comédies de Lesage et Dancourt, mettant en évidence le rôle du théâtre comique comme espace de critique sociale et d'expérimentation idéologique à un moment clé de l'histoire littéraire et sociale.

3. La crise des valeurs dans le discours comique de Dancourt et Lesage

L'approche historique des discours, telle que proposée par Wodak (2001), privilégie une analyse qui ne se limite pas à la seule dimension linguistique du texte, mais qui prend en compte l'ensemble des contextes dans lesquels il s'inscrit. Il s'agit d'intégrer les dimensions historiques, politiques, sociales et psychologiques qui influencent la production et la réception du discours. Cette méthode permet ainsi de mieux comprendre les mécanismes sous-jacents au texte, en situant son sens au croisement de multiples facteurs externes, ce qui enrichit l'interprétation et offre une lecture plus complète des phénomènes discursifs étudiés. Dans cette perspective, l'étude des rapports entre " discours ", " pouvoir " et " idéologie " constitue, à notre avis, un outil essentiel pour analyser les comédies de Lesage et Dancourt, afin de mieux saisir les dynamiques qui ont guidé leur création. Portés par cette perspective sur le discours, nous proposons, à travers cet article, de revisiter la crise des valeurs telle qu'elle se manifeste dans le texte dramatique de la fin du XVII^e siècle.

Les comédies de Lesage et Dancourt développent un discours témoignant d'une crise annonciatrice de profondes mutations dans les domaines économique et social de la société française. À cet égard, Danièle Sallenave rappelle que la littérature constitue "une source de connaissance pour l'humanité grâce à sa capacité à créer des mondes possibles et à véhiculer des idées en résonance avec notre réalité" (Danièle Sallenave, 1997, pp. 18-19)ⁱⁱⁱ. Le théâtre comique, loin d'échapper à cette fonction, se révèle un espace privilégié pour appréhender les dynamiques socio-économiques propres à cette période.

Dans les pièces de Lesage et Dancourt, les enjeux de l'actualité sont abordés avec une satire virulente ; les deux dramaturges recourent à l'ironie pour mettre en lumière le fossé qui se creuse au sein des mentalités et des relations sociales. Le portrait qu'ils dressent s'appuie principalement sur les comportements et attitudes de personnages immergés dans le tumulte des profondes transformations de leur époque. Il s'agit souvent d'individus dépourvus de scrupules, qui provoquent le rire en franchissant toutes les limites morales et se présentant *a fortiori* comme des monstres risibles. À travers eux, la bêtise humaine, conjuguée à l'émergence d'une nouvelle éthique bourgeoise, est crûment dévoilée. Par exemple, dans *La Folle Enchère*, Dancourt met en scène un représentant de la loi, un notaire, ironiquement qualifié par Éraste de "meilleur homme du monde", puisqu'il accepte de lui rendre un service illégal moyennant une somme modeste : "il m'a demandé mille écus pour me rendre un si bon office" (Dancourt, 1690, acte I, sc2).

Lesage met en scène le Chevalier et son valet Frontin, qui unissent leurs efforts pour s'approprier la fortune de Turcaret, en utilisant la Baronne comme intermédiaire, sans éprouver le moindre regret. Le dialogue suivant illustre la primauté de l'intérêt matériel dans les relations sociales et les mœurs naissantes de l'époque:

Le Chevalier:

Je ne rends des soins à la coquette que pour l'aider à miner le traitant.

Frontin:

Fort bien: à ces sentiments généreux, je reconnais mon maître. (Lesage, 1709)

Ce bref échange, apparemment léger et teinté d'ironie, révèle en réalité une mentalité où la séduction se transforme en un outil stratégique au service d'intérêts financiers. Le terme "généreux", employé par Frontin, est un sarcasme qui souligne le cynisme ambiant: l'honneur et l'amour sont relégués au second plan, subordonnés aux calculs économiques, témoignant d'un renversement des valeurs propre à cette période.

Cette mentalité paraît s'étendre à toutes les couches de la société. Ainsi, Marine, la servante, exprime avec fermeté l'importance primordiale de l'argent. Elle rappelle à la Baronne la nécessité de "bien prévoir l'avenir" en tirant parti de la "générosité" du financier, affirmant qu'il "faut s'attacher à monsieur Turcaret, pour l'épouser ou pour le ruiner" (Lesage, 1709). Le terme "générosité", ici employé par Marine, ne renvoie en aucun cas à un véritable élan altruiste, mais désigne plutôt une bienveillance intéressée à exploiter. Ce choix lexical, à forte connotation ironique, illustre clairement le renversement des valeurs traditionnelles et la domination de l'argent dans les relations humaines. La position de Marine témoigne également de l'intériorisation de cette logique utilitariste au sein même des domestiques, qui adaptent leurs stratégies aux opportunités offertes par la corruption ambiante dans les cercles sociaux.

Dans *La Folle Enchère*, les personnages se laissent aller, sans la moindre retenue, à une obsession manifeste du profit, usant de tous les moyens pour accroître leur richesse. Les relations et les interactions qui structurent la pièce sont ainsi soumises à la loi implacable de l'offre et de la demande. Merlin illustre parfaitement cette logique marchande dans le passage suivant, qui révèle que tout a un prix et revient à celui qui offre le plus:

À deux cent dix mille livres, une fois, deux fois, à deux cent dix mille livres. Écrivez, Monsieur de Bonnefoi, adjudé à la plus offrante.

Ne voudriez-vous point mettre quelque chose de plus? (Dancourt, 1690, p. 22)

Le terme même "enchère" revêt une portée symbolique majeure: il met en lumière la marchandisation croissante des relations humaines dans une société régie par la quête du profit. Tout devient objet d'échange et de spéculation, reléguant sentiments et engagements personnels au second plan, subordonnés à la logique financière. La ritualisation de l'enchère incarne ainsi la déshumanisation progressive des rapports sociaux au profit d'une ère mercantile naissante, où seule la puissance monétaire détermine le vainqueur.

En conséquence, la morale traditionnelle cède progressivement du terrain aux nouvelles aspirations des personnages, focalisées sur l'enrichissement et l'ascension sociale. Toutefois, cette évolution est traitée sous un prisme comique qui met en lumière les travers et les défauts des protagonistes. Il ne s'agit pas en effet d'un rire léger ou euphorique, mais plutôt d'une hilarité cynique dissimulées derrière ces comportements facétieux. La comédie bien plus qu'un simple divertissement devient le lieu d'exposition des contradictions d'une société en pleine transformation.

Dans cette même pièce de théâtre, (*La Folle Enchère*), Angélique nourrit le rêve d'accéder au rang de marquise, de "forcer l'accès de l'aristocratie" (Sartre, 2011, p. 54). Elle formule ses désirs sous forme de questions affirmatives implicites, sollicitant la confirmation de sa servante: "N'est-il pas vrai que j'étais née pour être tout au moins Marquise?" (Dancourt, 1690, acte I, sc5). Son ambition est de transformer sa vie en une existence plus noble, où elle pourrait librement exercer ses passions, notamment celle de "joueuse" excessive, sans subir les discriminations liées à son origine sociale ni être contrainte de "faire semblant" (Dancourt, 1690, acte I, sc5) d'appartenir à la noblesse.

Nous soutenons que l'exposition de la crise économique sur les tréteaux ne se limite pas à un simple procédé dramaturgique dans les œuvres de Dancourt et Lesage, mais revêt une fonction plus essentielle. Si elle suscite un comique fondé sur le décalage entre l'être et le paraître, elle résonne aussi avec des préoccupations sociales profondes, telles que l'ascension d'une bourgeoisie marchande émergente et les tensions qu'elle engendre entre les anciennes élites et ces nouvelles classes dominantes. Ainsi, qu'ils soient roturiers ou bourgeois, les personnages traduisent souvent frustrations, ambitions et désillusions, témoignant d'une société en pleine déstabilisation morale et économique, où les repères traditionnels s'effacent et où toutes les conduites semblent désormais permises.

Lorsque Marine conseille à La Baronne de dépouiller Turcaret en s'emparant "de l'argent comptant, des bijoux, de bons billets au profit, des contrats de rente" (Lesage, 1709, acte I, sc1), elle met en lumière la prééminence de cette nouvelle éthique marchande qui régit désormais les rapports sociaux. Ce discours ne se limite pas à une simple stratégie opportuniste, mais traduit une idéologie dominante qui guide les comportements des protagonistes. Dans ce cadre, la poursuite incessante du profit s'impose comme une norme, justifiant tous les moyens et légitimant des actions autrefois jugées immorales ou indignes. Ainsi, le propos de Marine révèle l'emprise croissante de la logique financière sur les relations humaines, réduisant les liens sociaux à des transactions et les valeurs à de simples marchandises. Elle pousse l'argumentation aux confins du cynisme en tentant de convaincre sa maîtresse que sa réputation pourrait aisément être "réhabilitée" par "un bon mariage" négociable avec "quelque gentilhomme capricieux ou mal aisé" (Lesage, 1709, acte I, sc1). Cette vision cynique des relations sociales témoigne de l'imprégnation profonde des personnages de Lesage par les nouvelles mœurs financières.

La logique mercantile transparaît clairement chez beaucoup d'autres personnages. Ainsi, accablée par les dettes, Madame Amelin préfère consacrer son argent à ses passions pour le jeu plutôt qu'à ses obligations financières :

Oh, quand elle gagnerait mille pistoles, elle aimerait mieux mourir que d'en acquitter la moindre dette : c'est une chose sacrée que l'argent du jeu ; diantre, ce sont des fonds pour le plaisir, où l'on ne touche point pour le nécessaire. (Dancourt, 1693, acte I, sc11)

Ce passage met en lumière la dissociation entre les obligations matérielles et les aspirations personnelles, révélant une forme d'irresponsabilité revendiquée et la prévalence accordée à la satisfaction immédiate au détriment des engagements. Il traduit également la tension entre les contraintes imposées par l'ordre social et les impulsions individuelles des personnages. Si cette dynamique contribue à la dimension comique de l'intrigue, elle n'en constitue pas moins une critique incisive de conduites perçues comme symptomatiques de dysfonctionnements sociaux.

La focalisation opérée par les dramaturges sur l'aspect intéressé des rapports sociaux met en évidence l'interaction étroite entre le contexte socio-économique et les idées véhiculées par le texte ou la représentation théâtrale. On assiste ainsi à une interférence entre la comédie morale et la comédie politique, la satire intégrant désormais des thématiques liées au commerce, à l'argent et aux stratégies d'ascension sociale. Dans cette perspective, la comédie, loin de se réduire à un simple divertissement moral, se trouve progressivement traversée par les enjeux économiques de son époque. La notion de "contamination"⁶⁵ ne renvoie pas ici à une

⁶⁵ Ici, par "contamination" Bourdieu entend que la comédie morale, centrée sur les valeurs, les comportements et les mœurs, n'est plus purement autonome : elle est imprégnée, influencée et traversée par les préoccupations de l'économie politique naissante. Cette « contamination » n'est pas

dénaturation, mais plutôt à un glissement progressif : les intrigues et les types comiques, autrefois centrés sur la morale et les mœurs, incorporent peu à peu les logiques marchandes et les calculs d'intérêt propres à une "culture négociante" naissante. Le théâtre devient ainsi un espace où se donne à voir, parfois de manière implicite, l'émergence d'une mentalité façonnée par l'économie. C'est dans cette optique que Bourdieu analyse l'apparition, à la fin du XVII^e siècle, de nouvelles thématiques propres à la comédie, soulignant "la cohérence d'un processus de contamination de la comédie morale par l'économie politique émergente (...) une culture négociante commence à apparaître" (Bourdieu, 2000, p. 28).

En effet, ces dramaturges ont su, à travers leurs écrits, dresser un tableau social d'une époque traversée par des mutations socio-économiques. L'analyse permet, dans un premier temps, de comprendre comment ces auteurs ont élaboré un discours dramatique à la fois novateur et solidement ancré dans les réalités sociales et économiques de leur époque, faisant de la crise non pas un simple arrière-plan, mais un élément structurant de l'esthétique théâtrale. À cet égard, Michel Corvin souligne l'importance d'inscrire chaque genre littéraire dans son contexte idéologique:

Chaque époque a son propre système de genres, qui est en rapport avec l'idéologie dominante. Une société choisit et codifie les actes qui correspondent au plus près à son idéologie ; c'est pourquoi l'existence de certains genres dans une société, leur absence dans une autre, sont révélatrices de cette idéologie. (Corvin, 1994, p. 4)

Cela permet d'affirmer que le discours comique ne se réduit pas à une fonction ludique ou purement esthétique: il est intrinsèquement lié à la société dans laquelle il est produit. La comédie de la fin du XVII^e siècle reflète et interroge ainsi les mutations profondes qui affectent les mœurs, les valeurs et les rapports sociaux. Les œuvres de Dancourt et de Lesage en témoignent, faisant du théâtre un espace privilégié où s'élabore une nouvelle morale, façonnée par les transformations économiques et sociales.

Dans cette perspective, la première partie de l'article a montré comment la crise des valeurs s'incarne et se manifeste dans le discours comique. La seconde partie examinera le rôle de ce discours en tant que vecteur des mutations socio-économiques, en analysant la manière dont le théâtre post-moliéresque illustre et accompagne l'essor d'une société marchande naissante et les tensions qui en découlent.

4. Le Discours comique : un vecteur de mutations socio-économiques

Le discours ne naît pas *ex nihilo*: il résulte d'un processus dynamique, nourri par les idéologies sociales et culturelles propres à un moment donné de l'histoire. La fin du XVII^e siècle apparaît ainsi comme une période d'intense production comique, que l'on peut envisager comme un laboratoire où s'expérimente une condition humaine nouvelle, dominée par l'esprit d'avidité et de profit. L'intrusion d'un discours économique dans la comédie de cette époque s'inscrit donc pleinement dans un cadre socio-historique propice à son émergence.

À cet égard, Martial Poirson souligne, dans ses travaux sur les interactions entre littérature et économie, que le théâtre de la fin de l'Ancien Régime se conçoit lui-même comme un produit

une infection au sens négatif, mais plutôt une pénétration progressive : les thèmes de l'argent, de l'intérêt, du calcul et des échanges marchands viennent colorer, transformer et redéfinir les intrigues et les personnages, reflétant la montée d'une mentalité commerçante dans la société.

soumis aux lois du marché: “le spectacle théâtral” apparaît comme “un bien marchand” (Poirson, 2011, p. 23).

En effet, dans les comédies de Dancourt et de Lesage, la réalité économique se déploie comme un univers paradoxal : on y dénonce avec virulence les financiers et autres acteurs des jeux d’argent, tout en demeurant soi-même intégré au système marchand que l’on critique. Les auteurs comiques, loin d’adopter la posture de spectateurs extérieurs, participent pleinement à cette nouvelle éthique économique qui imprègne la société. Pour répondre aux impératifs d’une époque régie par les lois du marché, ils conçoivent des œuvres théâtrales qui doivent avant tout assurer leur rentabilité. Cette contrainte commerciale explique, en partie, la tendance à composer des pièces calibrées pour séduire un public avide de divertissements légers, parfois triviaux, inscrivant ainsi leur production dans la logique marchande de l’époque.

De ce point de vue, le théâtre comique de Dancourt et de Lesage oscille entre une critique sociale et morale des dérives économiques et une participation active à la dynamique de commercialisation de l’art. Gisèle Sapiro, s’appuyant sur les analyses de Marc Angenot, rappelle que “les œuvres littéraires véhiculaient des discours largement répandus à l’époque de leur production” (Sapiro, 2014, p. 59). Cette remarque invite à considérer que ces comédies ne se réduisent pas à une création artistique originale : elles fonctionnent également comme un reflet, parfois atténué, parfois déformé, des idées reçues, clichés et stéréotypes qui structuraient l’imaginaire collectif de leur temps.

Ainsi, ces pièces contribuent à la fois à la diffusion et à la reproduction des représentations sociales dominantes, tout en ménageant un espace de contestation, explicite ou implicite, des travers humains et des tensions socio-économiques. Le théâtre comique se présente dès lors comme un lieu d’articulation complexe où se mêlent confirmation et subversion des normes collectives, révélant les liens étroits entre création dramatique, idéologie et contexte socio-historique à la fin du XVII^e siècle.

L’environnement de la création théâtrale à la fin du XVII^e siècle s’inscrit dans un contexte mercantile, marqué par la primauté de l’intérêt personnel et par la recherche constante du profit. Comme l’observe Pierre Bourdieu, la société tend à se structurer selon une logique économique rationnelle, fondée sur la “poursuite étroite de son intérêt” (Bourdieu, 2000, p. 55). Cette rationalisation progressive des rapports sociaux redéfinit les hiérarchies et les comportements collectifs: le statut et l’influence de l’individu dépendent désormais moins de sa naissance que de sa capacité à accumuler des ressources, à investir et à s’imposer dans les échanges économiques.

Cette nouvelle tendance socio-économique trouve un écho particulièrement net dans le théâtre comique de Dancourt et de Lesage. Loin de se limiter à une simple représentation des changements à l’œuvre, leurs pièces en constituent une véritable mise en lumière critique, révélant les logiques et les contradictions qui structurent la société de leur temps. En mobilisant et en amplifiant les discours, clichés et comportements dominants, ces auteurs donnent chair à une morale marchande naissante, où l’égoïsme calculateur et la rationalité économique supplantent progressivement les valeurs collectives et les références morales héritées. Le théâtre devient ainsi un miroir réflexif des tensions propres à une époque charnière, partagée entre l’attachement aux traditions et l’ascension d’un ordre nouveau, dans lequel la puissance financière s’impose comme déterminant majeur du pouvoir et des relations sociales.

Cependant, si le théâtre met en lumière cette nouvelle éthique marchande ainsi que ses dérives, les auteurs eux-mêmes ne sauraient être considérés comme des observateurs innocents ou distanciés. Ils occupent au contraire une position d’acteurs pleinement investis dans cette

société en pleine transformation. En donnant à voir les contradictions et dysfonctionnements de leur époque, il cherche à attirer un public “qui aime rire aux dépens de ceux qui le font pleurer” (Lesage, 1709, p. 39). Il s’agit pour eux de garantir la survie économique de leur art et de leur existence dans un contexte où la production culturelle est soumise aux impératifs du marché. Le théâtre se présente alors comme un microcosme économique où l’appartenance au cercle mercantile et la capacité à saisir les opportunités y occupent une place centrale et déterminante.

Dans *Turcaret*, ce phénomène se manifeste nettement à travers les propos des personnages, qui incarnent les nouvelles valeurs favorisant l’ascension sociale, fondée non plus sur la noblesse d’origine ni sur la valeur du travail, mais sur des attitudes arrivistes désormais privilégiées. Le monologue du valet Frontin illustre parfaitement cet état d’esprit :

Courage ! Frontin ! courage, mon ami, la fortune t’appelle. Te voilà chez un homme d’affaires par le canal d’une coquette. Quelle joie ! l’agréable perspective ! je m’imagine que toutes les choses que je vais toucher vont se convertir en or... Mais j’aperçois ma pupille. (Lesage, 1709, acte II, sc6)

Ce passage révèle l’enthousiasme mêlé à l’avidité de Frontin, qui perçoit dans cette situation une opportunité unique de transformer en richesse tout ce qu’il approche. En tant que personnage subalterne, Frontin incarne ainsi l’aspiration collective à la réussite matérielle, quel qu’en soit le prix.

Par ce biais, le théâtre comique de la fin du XVII^e siècle dépeint une société où la logique économique s’impose comme moteur principal des relations humaines, supplantant les anciens codes moraux par une éthique du profit et de l’opportunisme. Cette représentation, tout en dénonçant les excès de cette nouvelle ère, révèle aussi l’implication des auteurs eux-mêmes dans ce système. En effet, pour survivre et prospérer, ils produisent des comédies “sur mesure” parfois triviales, répondant aux goûts d’un public immergé dans cette réalité marchande. Ainsi, la comédie devient un acteur à part entière du jeu économique qui anime la société de leur temps.

La fin du XVII^e siècle constitue une étape décisive où le discours social s’intègre de manière profonde au sein du texte littéraire. Les dramaturges voient leur statut évoluer : ils ne sont plus de simples artistes placés sous la protection de la cour royale, mais deviennent des professionnels indépendants. Cette nouvelle condition les oblige à produire et publier afin d’assurer leur subsistance, tout en cherchant à conquérir une certaine autonomie économique. Cependant, cette indépendance reste relative, étroitement liée à la relation avec les éditeurs, comme le souligne Béatrice Didier :

Si la législation des droits d’auteur est encore loin d’exister, l’écrivain peut cependant tirer sa subsistance de la vente de son manuscrit à un libraire (un éditeur, dirions-nous), ce qui lui assure une relative indépendance par rapport au pouvoir royal, mais crée une dépendance économique envers l’éditeur. (Didier, 2003, p. 11)

Ainsi, la liberté artistique conquise par les dramaturges s’accompagne d’une nouvelle forme de contrainte économique, qui influence à la fois leur production littéraire et leur position au sein du paysage culturel de leur époque.

La fiction dramatique du XVII^e siècle dépasse largement la seule fonction de divertissement; elle se présente également comme un révélateur essentiel d’une époque charnière, marquée par l’émergence des prémices d’un monde libéral en pleine gestation, qui s’affirmera pleinement au cours des siècles suivants. Le théâtre de cette période assume ainsi

un double rôle : il allie le plaisir du spectacle et à une réflexion sur les mutations sociales et économiques qui redéfinissent les fondements de la société.

À cet égard, Anne Michel, dans un article publié en 2009, souligne la pertinence toujours actuelle du personnage de *Turcaret*. Elle y voit l'incarnation exemplaire d'une transformation sociale profonde, marquée par la montée d'un opportunisme décomplexé et d'un matérialisme exacerbé. Selon elle, *Turcaret* "annonce [...] l'avènement d'une société cynique et corrompue où l'homme perd tous ses repères" (Michel, 2009, p. 35). Ainsi, par sa dimension satirique, la pièce dépasse le cadre de la critique morale du début du XVIII^e siècle pour atteindre une portée universelle, offrant un miroir dans lequel se reflètent également les dérives économiques et éthiques des sociétés contemporaines.

Par cette lecture, le théâtre ne se limite pas à offrir un divertissement, mais érige la scène en un véritable espace de réflexion, où s'exposent et se questionnent les dérives morales engendrées par l'essor d'une société régie par le profit et le calcul. La comédie acquiert alors une dimension critique de son temps. Par le truchement de la satire, elle met en lumière les tensions et contradictions d'un monde en pleine mutation.

En somme, bien que relevant du registre fictionnel, ces comédies s'ancrent dans une réalité sociale et historique en pleine mutation. Elles donnent à voir une société engagée dans un tournant décisif sous le règne de l'argent, de la spéculation, des rapports d'intérêts et l'ascension de la bourgeoisie économique. Cette lecture rejoint l'analyse lucide de Balzac (1979) qui, dans *La Comédie humaine*, souligne le caractère subversif de telles œuvres : "La bourgeoisie, moins libérale que Louis XIV, tremble de voir venir son *Mariage de Figaro*, défend de jouer le *Tartuffe* politique, et certes, ne laisserait pas jouer *Turcaret* aujourd'hui, car *Turcaret* est devenu le souverain" (Balzac, 1979, p. 592). Par cette remarque incisive, l'écrivain met en lumière l'actualité persistante du propos de Lesage, révélant comment la satire d'hier se heurte, aujourd'hui encore, aux résistances d'un pouvoir économique devenu hégémonique.

5. Conclusion

Le théâtre comique de la fin du XVI^e siècle, à travers les œuvres de Dancourt et Lesage, apparaît bien plus qu'un simple divertissement. Il constitue un espace de réflexion et de critique où se dévoilent les profondes mutations sociales et économiques de l'époque. En mettant en scène des personnages avides, obsédés par l'argent et prêts à tous les compromis pour accéder à la fortune, ces dramaturges exposent une crise des valeurs qui dépasse le cadre individuel pour interroger les fondements mêmes de la société.

En croisant les analyses littéraires, historiques et sociologiques, cet article a souligné que la comédie post-moliéresque est à la fois le témoin et l'acteur d'un tournant historique, annonciateur du règne de la bourgeoisie. Par son pouvoir de mise en scène et de mise en question, elle ouvre une fenêtre sur la complexité des rapports humains dans un monde en mutation, et pose une interrogation toujours actuelle sur les liens entre art, société et économie.

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La crise dans le discours politique: analyse pragma-linguistique des tweets des leaders mondiaux face à la pandémie de COVID-19

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Résumé

Cet article propose une analyse pragma-linguistique du discours politique de crise à travers les tweets de deux chefs d'État : Emmanuel Macron (France) et Kais Saied (Tunisie), durant la pandémie de COVID-19. À partir d'un corpus constitué de messages publiés sur Twitter pendant les périodes critiques de la pandémie, l'étude met en lumière les stratégies discursives utilisées pour légitimer l'autorité, mobiliser la population et instaurer un consensus. Trois axes sont explorés : la performativité du discours, la construction de récits de crise et la spécificité interactionnelle des réseaux sociaux. L'analyse révèle comment Macron s'inscrit dans un registre républicain fondé sur la rationalité, tandis que Saied articule un discours symbolique et souverainiste visant à rassembler la nation. Twitter apparaît ainsi comme un espace de condensation discursive, mais aussi d'exposition aux tensions communicationnelles liées à la crise.

Mots-clés: discours politique, COVID-19, Analyse pragma-linguistique, réseaux sociaux, légitimation

Abstract

1. Introduction

La pandémie de COVID-19 a représenté une crise sanitaire mondiale sans précédent, mais elle a aussi révélé une crise du discours politique, contraint de se réinventer dans un contexte d'incertitude, de peur collective et de saturation médiatique. Dans ce contexte, Twitter s'est imposé comme un outil privilégié de communication directe entre les dirigeants politiques et leurs citoyens. Cette prise de parole immédiate et condensée, bien que brève, n'en demeure pas moins lourde d'enjeux : affirmer une autorité, rassurer une population, légitimer des décisions parfois impopulaires.

Cet article propose une lecture pragma-linguistique des discours politiques diffusés sur Twitter par deux figures présidentielles durant la période critique de la pandémie : Emmanuel Macron (France) et Kais Saied (Tunisie). Tandis que Macron structure sa parole autour d'un ethos présidentiel républicain, appuyé sur des valeurs d'unité et de combat, Saied mobilise un registre institutionnel et symbolique, en insistant sur la souveraineté et la continuité de l'État,

dans une volonté manifeste de rassembler le peuple autour d'un idéal commun de dignité et de résistance.

Le corpus étudié se compose des tweets publiés par les comptes officiels de @EmmanuelMacron et @PresidenceTn (Kais Saied) entre mars 2020 et mai 2021. Les tweets sélectionnés relèvent tous d'un discours de crise: ils abordent des mesures sanitaires (confinement, vaccination), des appels à la responsabilité citoyenne, ou des expressions de solidarité nationale et internationale. Le choix de ces deux figures permet une mise en perspective comparative entre deux traditions politiques (républicaine française et présidentielle tunisienne) et deux postures discursives.

Nous analyserons ainsi trois dimensions discursives essentielles: les stratégies performatives d'autorité, la rhétorique de légitimation en situation de crise, et enfin les spécificités interactionnelles propres à Twitter, lieu d'un discours à la fois contrôlé et exposé à la réception immédiate.

2. Performativité et construction de l'autorité discursive

2.1 Les actes de langage illocutoires : promesses, injonctions et avertissements

En contexte de crise, la parole politique ne se limite pas à informer ou expliquer ; elle agit, mobilise, rassure et ordonne. La pandémie de COVID-19, en tant qu'événement inédit à portée mondiale, a donné lieu à une prolifération d'énoncés présidentiels dont la performativité est au cœur du dispositif discursif. Dans le cadre de la théorie des actes de langage développée par J.L. Austin (1970), le langage n'est pas seulement descriptif : « dire, c'est faire ». Autrement dit, tout énoncé présidentiel prononcé ou publié dans un tel contexte est potentiellement porteur d'un effet pragmatique direct, engageant le locuteur et reconfigurant la réalité sociale.

Dans les tweets des dirigeants, plusieurs formes d'actes illocutoires coexistent : les assertifs (énoncer un fait ou une opinion), les directifs (donner un ordre ou un conseil), les promissifs (s'engager), et les expressifs (exprimer une émotion ou une reconnaissance). Ces actes sont investis d'un poids institutionnel particulier lorsqu'ils sont émis par une figure d'autorité, d'autant plus en situation d'urgence.

Un exemple emblématique est fourni par Emmanuel Macron dans un tweet du 16 mars 2020

“Nous sommes en guerre”

Cette déclaration, aussi brève que marquante, agit à plusieurs niveaux. D'un point de vue illocutoire, elle relève d'un acte déclaratif au sens de Searle (1969), dans la mesure où elle ne se contente pas de décrire une situation mais la constitue symboliquement. Le recours au champ lexical militaire sert de cadre interprétatif pour penser la pandémie comme un conflit, légitimant ainsi l'instauration de mesures exceptionnelles (confinement, restrictions de mobilité, réquisitions). La force de cet énoncé tient à sa capacité à produire une relecture collective de la situation à travers une métaphore fondatrice, en activant une mémoire discursive de la mobilisation nationale en temps de guerre.

À l'autre extrémité du spectre discursif, le président Kais Saied, dans un tweet du 18 avril 2020, affirme:

“Il n'y a pas de place pour le relâchement. Le peuple tunisien a toujours su résister.”

Cet énoncé combine plusieurs fonctions pragmatiques. L'ouverture du message — « Il n'y a pas de place pour le relâchement » — fonctionne comme un acte directif sous forme

d'avertissement. Il implique une injonction à la discipline, sans recourir à un impératif formel. La deuxième proposition — “Le peuple tunisien a toujours su résister” — relève d'un acte expressif et assertif, qui vise à valoriser l'auditoire en le plaçant dans une continuité historique de bravoure et de résilience. Cette combinaison permet de naturaliser l'obéissance, non comme soumission à une autorité, mais comme fidélité à une identité collective valorisée.

Ce type de formulation illustre parfaitement ce que Charaudeau (2005) nomme une stratégie d'ancrage culturel, par laquelle le locuteur cherche à construire du consensus en s'appuyant sur des représentations partagées. L'acte d'énonciation est ici une manière d'interpeller le peuple non seulement en tant que destinataire mais aussi en tant qu'acteur du récit national. On observe ainsi, dans les deux cas, une volonté de réaffirmer une légitimité énonciative à travers une parole investie d'une fonction performative : décréter, rassurer, exhorter — autant de gestes langagiers qui traduisent une conception active du discours politique en temps de crise.

2.1.1 Modalisation et ethos présidentiel

Dans le cadre du discours politique de crise, la modalisation joue un rôle fondamental dans la construction de l'autorité énonciative. Elle permet aux locuteurs institutionnels de graduer leurs énoncés, d'en ajuster la force illocutoire et d'orienter la réception du message. En contexte pandémique, cette modalisation devient une stratégie de régulation discursive, à travers laquelle les présidents s'efforcent de maintenir un équilibre entre injonction, responsabilisation et légitimation.

Emmanuel Macron fait un usage récurrent de modalisateurs déontiques, c'est-à-dire de formulations qui expriment l'obligation ou le devoir (ex. : “Il faut”, “Nous devons”, “Il est nécessaire”). Cette modalisation permet de construire un ethos de président rationnel et gestionnaire, ancré dans une logique d'efficacité collective. Ainsi, dans un tweet du 14 avril 2020, il affirme :

“Nous devons continuer à respecter les consignes. Chaque geste compte.”

Ici, la présence du verbe “devoir” impose un cadre normatif qui ne laisse guère de place à l'alternative. Il s'agit moins d'une recommandation que d'un appel à la conformité. Ce choix linguistique inscrit l'énoncé dans une dynamique d'énonciation prescriptive, dans laquelle l'autorité du président se présente comme nécessaire à la sauvegarde du bien commun. La deuxième phrase (“Chaque geste compte”), à caractère aphoristique, renforce cette posture en individualisant la responsabilité tout en la collectivisant, selon un principe d'interpellation généralisée.

À l'inverse, Kais Saied privilégie une modalisation axiologique, orientée vers les valeurs morales et symboliques plutôt que vers la prescription. Son discours s'inscrit davantage dans une perspective éthique que gestionnaire. Dans un tweet du 21 mai 2020, il écrit :

“Le droit à la santé est un droit fondamental. L'État sera à la hauteur de sa mission.”

Cette formulation repose sur deux énoncés assertifs qui, bien que présentés comme des évidences, fonctionnent comme des actes de légitimation implicite. En affirmant un droit fondamental, Saied s'aligne avec des valeurs universelles, ce qui confère une dimension éthique à sa parole. L'engagement de l'État (“sera à la hauteur”) inscrit cette promesse dans une temporalité futuriste, teintée de confiance. Le président adopte ici une posture de garant moral de l'intérêt public, construisant un ethos présidentiel protecteur et engagé.

Ces deux modalités illustrent deux formes distinctes de rapport à l'autorité discursive : l'une fondée sur la rationalité normative (chez Macron), l'autre sur la souveraineté éthique et la

légitimation morale (chez Saied). Si le premier s'appuie sur la responsabilité civique et l'adhésion aux règles, le second convoque la légitimité symbolique de l'État en tant que dépositaire des droits du peuple.

2.1.2 Le 'nous' politique: figure du collectif

Le pronom personnel « nous » occupe une place centrale dans la rhétorique politique, notamment en période de crise. Il fonctionne comme un outil d'inclusion stratégique, en brouillant la distinction entre locuteur institutionnel et citoyens. L'usage du « nous » permet ainsi aux dirigeants de co-construire une appartenance partagée, en instaurant une illusion d'unité et de convergence entre les sphères du pouvoir et la société civile.

Dans le discours de Macron, ce pronom est mobilisé pour créer un effet de solidarité horizontale. Lorsqu'il écrit, le 13 mars 2020 :

“Nous tiendrons ensemble.”

Il produit un énoncé performatif qui efface momentanément la hiérarchie institutionnelle pour faire émerger une communauté discursive face à l'adversité. Ce type d'énoncé s'inscrit dans une logique d'appartenance inclusive, où le président ne se place pas au-dessus, mais aux côtés de ses concitoyens. Ce « nous » fonctionne alors comme un instrument d'adhésion affective, destiné à renforcer la confiance dans l'action gouvernementale.

Chez Kais Saied, le “nous ” prend une dimension plus historico-identitaire. Il se fait l'écho d'une mémoire collective, réactivant des références à des épisodes fondateurs de la nation. Par exemple :

“Nous avons combattu la colonisation, nous vaincrons cette épreuve.”

Ce double énoncé établit un parallèle symbolique entre les luttes passées et la crise présente, instaurant ainsi une forme de continuité héroïque. Le président cherche ici à fédérer la population en réactivant un récit national fondé sur la résistance et la dignité. Selon Amossy (2010), ce type de topos repose sur des représentations largement partagées, mobilisées pour construire du consensus autour d'un imaginaire collectif unificateur.

Dans les deux cas, l'emploi du pronom “nous » dépasse sa fonction grammaticale pour devenir un acte stratégique de co-construction du lien politique. Il permet au discours de s'ancrer dans un régime de proximité symbolique, qui neutralise — du moins en apparence — les asymétries de pouvoir. Ainsi, qu'il soit mobilisé comme levier de mobilisation (chez Macron) ou comme marqueur d'identité (chez Saied), le “nous ” constitue un outil discursif central pour produire une illusion d'unité et renforcer la légitimité de l'action politique en période de crise.

3. Rhétorique de la crise et légitimation du pouvoir

3.1 Narrativisation héroïque et dramatisation

En contexte de crise, les dirigeants politiques n'adoptent pas uniquement une posture d'administration rationnelle des faits ; ils construisent aussi des récits. Face à l'incertitude, à la peur et à la discontinuité du réel, le discours politique prend en charge une fonction narrative, visant à ordonner l'événement et à lui donner du sens. Cette stratégie repose sur ce que Jean-Michel Adam (1999) nomme la "narrativisation du discours argumentatif", c'est-à-dire l'articulation d'un récit structuré autour de figures, d'oppositions symboliques et de valeurs.

Durant la pandémie de COVID-19, cette narrativisation a souvent pris la forme d'une mise en scène héroïque, dans laquelle le président incarne la voix de la nation en lutte. La dramatisation des enjeux — présentée comme une guerre contre un ennemi invisible — constitue une des ressources majeures de ce type de récit. Elle permet de mobiliser l'opinion, de légitimer des mesures exceptionnelles et d'installer un horizon d'attente tourné vers la victoire.

Un exemple particulièrement significatif est fourni par Emmanuel Macron, dans son discours du 16 mars 2020, relayé sur Twitter :

“Nous sommes en guerre.”

Cet énoncé, d'une grande densité symbolique, agit comme un acte discursif inaugural. Il déplace l'interprétation de la pandémie du registre sanitaire vers un registre martial. Le virus est assimilé à un ennemi, la population à une armée, et les soignants à des soldats. Ce type de métaphore conceptuelle, analysée notamment par George Lakoff, participe à une reconfiguration cognitive de la situation. En désignant la crise comme un conflit, Macron justifie des dispositifs contraignants (confinement, couvre-feux, fermeture des frontières) au nom d'une logique de mobilisation totale. Il s'agit ici d'un discours de dramatisation contrôlée, destiné à instaurer un climat de gravité tout en appelant à l'unité nationale.

Le récit héroïque n'est pas seulement porté par le lexique de la guerre, mais aussi par la structure même du discours : un problème (le virus), un héros collectif (le peuple), une solution (la discipline, les mesures sanitaires), et un espoir (la victoire). Ce schéma narratif, bien que simplifié, facilite la circulation du message et renforce l'adhésion émotionnelle.

De son côté, Kais Saied mobilise une rhétorique de la crise reposant sur une logique différente, mais tout aussi puissante : celle de la sacralisation du peuple et de la mémoire nationale. Dans un tweet du 1er mai 2020, il déclare :

“Les épreuves forgent les peuples. La Tunisie triomphera.”

Contrairement à la dramatisation de type guerrier, Saied inscrit la pandémie dans une évolution historique du destin national. Il ne désigne pas d'ennemi extérieur mais évoque une épreuve symbolique, une phase transitoire que la nation surmontera comme elle a surmonté d'autres défis. Ce type de discours ne repose pas sur une opposition frontale (nous vs le virus), mais sur une temporalité longue et fondatrice, dans laquelle le peuple tunisien est perçu comme le sujet central d'un processus de résilience.

Ce faisant, Saied développe un discours d'inspiration providentielle, où le présent est une étape vers la réalisation d'un avenir meilleur. Il convoque une figuration mythique de l'histoire nationale, dans laquelle la crise actuelle est une nouvelle occasion de faire preuve de grandeur. L'éthos présidentiel se construit ainsi sur la capacité à inscrire l'événement dans un récit national téléologique, porteur d'espérance et de fierté.

Dans les deux cas, on observe un usage stratégique de la narrativisation comme mode de régulation émotionnelle. Le récit héroïque permet non seulement de nommer la crise, mais aussi de stabiliser le cadre interprétatif à travers lequel elle doit être lue. Cette stabilisation est essentielle pour éviter le chaos sémantique et maintenir la cohésion sociale.

En somme, que le discours présidentiel prenne la forme d'une guerre contre un ennemi invisible ou d'une épreuve inscrite dans l'histoire glorieuse de la nation, il remplit une fonction fondamentale : produire une intelligibilité politique de la crise, capable de générer de l'adhésion, de l'endurance et de la mobilisation collective.

3.2 Transparence, cadrage et contrôle du récit

Dans toute situation de crise, la communication politique est soumise à une tension constante entre transparence affichée et maîtrise stratégique de l'information. La parole présidentielle, loin d'être un simple reflet des faits, est toujours le produit d'un cadrage discursif (frame), au sens défini par Erving Goffman : un dispositif qui oriente la perception de la réalité selon des filtres idéologiques, institutionnels ou émotionnels. Ce cadrage permet aux dirigeants de structurer le récit de la crise, de hiérarchiser les données, et de canaliser les émotions collectives — tout en se préservant d'un excès de vulnérabilité.

Chez Emmanuel Macron, la notion de transparence est omniprésente dans les prises de parole, mais elle repose sur une construction discursive soigneusement orchestrée. Un exemple révélateur figure dans ce tweet du printemps 2020 :

“Sur recommandation des autorités sanitaires, nous prolongeons le confinement.”

À première vue, l'énoncé manifeste une posture de transparence décisionnelle : le président expose les fondements de sa décision, en la rattachant à une instance experte, extérieure à sa propre autorité. Toutefois, cette formulation opère un déplacement subtil : elle transfère la responsabilité du choix à une autorité scientifique, présentée comme neutre et objective. Ce recours à une autorité tierce permet à Macron de déléguer l'énonciation de la contrainte, et d'atténuer ainsi l'effet politique d'un message potentiellement impopulaire.

Ce procédé peut être lu, à la lumière des travaux de A van Dijk (2008), comme une stratégie de “bouclier discursif” : le locuteur se protège derrière une parole experte, tout en conservant le contrôle de la narration politique. Ainsi, ce type de cadrage construit une transparence médiée, dans laquelle l'énonciation présidentielle se fait en apparence réflexive, mais reste orientée, limitée, et filtrée. Le flou maintenu sur certains aspects — par exemple, les critères exacts de prolongation ou les désaccords internes — contribue à produire une illusion d'objectivité tout en renforçant l'autorité du chef d'État.

À l'inverse, Kais Saied articule son discours autour d'un cadrage juridique et institutionnel, qui renvoie directement à la légitimité constitutionnelle de l'action présidentielle. Dans un tweet significatif, il déclare :

“L'État respecte ses engagements. Le droit prime sur tout.”

Ce type d'énoncé affirme une vision principielle de la gouvernance, où l'action politique est non seulement conforme à la légalité, mais s'enracine dans une éthique de la souveraineté. Ici, la transparence ne réside pas dans la justification procédurale des décisions, mais dans la réaffirmation des fondements juridiques de l'État. Ce positionnement permet au président tunisien de se présenter comme gardien des institutions, dans un contexte où celles-ci sont régulièrement remises en question. Le cadrage ne porte donc pas tant sur l'explication des choix techniques que sur la symbolisation de la continuité de l'État, même en situation d'instabilité.

Mais ce cadrage, lui aussi, est sélectif. Il évacue les incertitudes, les débats scientifiques ou les tensions internes à l'appareil d'État pour leur substituer un récit de cohérence et de légalité, potentiellement éloigné de la complexité réelle du moment. Il s'agit d'un effet de simplification narrative, qui transforme le champ de la décision politique en espace d'évidence morale.

Dans les deux cas, le cadrage discursif agit comme un outil de gestion de la réception : il sert à stabiliser le sens, à prévenir la dissonance, et à assurer la continuité de l'autorité dans un environnement discursif saturé. Si Macron met en avant une transparence rationnelle appuyée sur les sciences, Saied mobilise une transparence institutionnelle fondée sur le droit. Ces deux modalités discursives illustrent bien le fait que la parole présidentielle, en temps de crise, n'est jamais une simple transmission d'information, mais une mise en scène minutieuse de la

légitimité — dont les contours sont toujours négociés, orientés et, parfois, stratégiquement opaques.

3.3 Légitimation symbolique et positionnement politique

En contexte de crise, la parole présidentielle ne se contente pas de répondre à l'urgence sanitaire ou d'encadrer les comportements collectifs : elle devient un dispositif de légitimation, au service d'une vision du pouvoir, d'un imaginaire politique et d'un projet d'identité nationale. Toute communication de crise est aussi un acte de positionnement symbolique, dans lequel se joue la manière dont un chef d'État entend être perçu — à l'échelle nationale comme internationale. Les choix lexicaux, les références mobilisées et les cadrages idéologiques trahissent ainsi les soubassements politiques du discours.

Dans les messages de Emmanuel Macron, cette fonction de légitimation s'inscrit dans une double logique : républicaine et européenne. Il construit son ethos présidentiel autour des valeurs fondatrices de la République française (solidarité, responsabilité, universalité), tout en ancrant son discours dans une posture multilatérale. Dans un tweet emblématique, il affirme : "Avec nos partenaires européens, nous agissons ensemble".

Cette formulation, apparemment anodine, a une portée stratégique claire : elle fait de la lutte contre la pandémie un espace de coopération transnationale, dans lequel la France s'affirme non pas en retrait ou en autarcie, mais comme acteur moteur d'une gouvernance collective. Le pronom possessif "nos " crée un sentiment d'appartenance partagée, tandis que le verbe d'action "agir" inscrit cette solidarité dans une temporalité active. En conjuguant affirmation nationale et ancrage européen, Macron renforce une légitimité d'envergure internationale, fondée sur l'intégration à des structures supranationales (Union européenne, OMS, G7).

Ce positionnement traduit une vision de l'autorité politique comme capacité à dialoguer, à coordonner, à prendre part à un effort mondial. Il s'agit d'un ethos de diplomate pragmatique, qui s'oppose implicitement aux replis souverainistes ou aux approches unilatérales. Ce faisant, Macron inscrit sa communication dans un modèle d'ouverture qui renforce son image de leader global tout en consolidant les alliances géopolitiques de la France.

À l'inverse, le discours de Kais Saied adopte une orientation affirmativement souverainiste, dans laquelle la crise devient une opportunité de réaffirmer l'indépendance nationale et la primauté du politique sur toute forme d'ingérence. Dans un tweet explicite, il déclare :

"La Tunisie est libre de ses décisions. Aucun diktat ne sera accepté."

Cet énoncé repose sur une rhétorique d'autodétermination, fondée sur la dénonciation implicite de pressions extérieures, qu'elles soient économiques, diplomatiques ou idéologiques. Le mot « diktat », historiquement chargé, renvoie à une mémoire collective de soumission, d'humiliation ou de dépendance, notamment vis-à-vis des institutions financières internationales ou des anciennes puissances coloniales. Saied se place ainsi dans une posture de défenseur de la souveraineté populaire, en désignant implicitement l'État comme rempart contre les forces extérieures menaçant l'autonomie nationale.

Ce positionnement discursif, s'il peut être lu comme un rejet de l'ingérence, constitue également une stratégie de légitimation interne. En mettant l'accent sur l'indépendance décisionnelle de la Tunisie, le président cherche à consolider sa propre autorité politique dans un contexte de défiance institutionnelle. Il construit un ethos vertical, dans lequel le chef d'État incarne la continuité historique et morale de la nation, au-delà des clivages partisans ou des tensions sociales.

Ces deux configurations discursives — l’une fondée sur la coopération internationale, l’autre sur la réaffirmation souveraine — ne relèvent pas uniquement de différences géopolitiques : elles expriment aussi deux conceptions du pouvoir, de l’État et de la légitimité en période de crise. Tandis que Macron légitime son action par l’insertion dans une communauté politique élargie, Saïed inscrit sa parole dans un cadre identitaire et vertical, centré sur la défense des intérêts nationaux.

Ainsi, à travers leurs discours respectifs, les deux présidents ne réagissent pas simplement à la pandémie : ils mettent en scène leur rôle politique, et engagent une performance discursive dans laquelle se rejouent les tensions fondamentales entre ouverture multilatérale et affirmation souverainiste, entre solidarité transnationale et autorité nationale renforcée.

4. Interaction, réception et enjeux discursifs sur les réseaux sociaux

4.1 Twitter: espace de condensation et de symbolisation

La limite de 280 caractères sur Twitter oblige les présidents à une communication très condensée, où chaque mot porte un poids symbolique important. Ce format court favorise des messages percutants, mêlant information et portée symbolique, comme le montrent Bruns et Burgess (2015).

Les hashtags (#Solidarité, #RestezChezVous) jouent un rôle central en ancrant le discours dans des thématiques fortes et en créant des repères symboliques partagés, facilitant ainsi la mobilisation collective (Bruns, Highfield, & Burgess, 2013).

Macron et Saïed enrichissent souvent leurs tweets par des images, vidéos ou emojis, ajoutant une dimension émotionnelle et rendant leur message plus accessible et engageant. Cette multimodalité transforme Twitter en un espace hybride, à la fois lieu de discours officiel et de communication interactive, où la solennité présidentielle se mêle à une proximité nouvelle avec les citoyens (Chadwick, 2013).

Cette hybridation pose néanmoins un défi : concilier la rigueur du discours institutionnel avec la rapidité et la fragmentation propre aux réseaux sociaux, sans tomber dans la simplification excessive ou le slogan creux.

4.2 Politesse, distance et stratégie relationnelle

Les présidents déploient une stratégie discursive qui conjugue à la fois proximité et affirmation d’autorité. L’emploi de la politesse positive, telle que définie par Brown et Levinson (1978), est manifeste dans leurs formules de reconnaissance et de valorisation du public. Par exemple, Macron remercie explicitement “nos soignants” et “ceux qui respectent les règles”, tandis que Saïed souligne la discipline du “peuple tunisien”, ce qui élève et honore son auditoire.

Ces énoncés valorisent le destinataire, favorisant un climat de confiance et de solidarité. Ils contribuent à réduire la distance sociale tout en consolidant la légitimité du locuteur en tant que leader bienveillant et proche de son peuple (Holmes, 2006). Cette stratégie interactionnelle permet d’humaniser le pouvoir et d’encourager l’adhésion aux mesures présentées.

Toutefois, ce mélange subtil de proximité et d’autorité peut aussi servir à contenir la critique et à cadrer les réactions, en imposant implicitement des normes comportementales. Ainsi, la politesse positive fonctionne ici comme un outil rhétorique ambivalent, à la fois inclusif et prescriptif.

4.3 Crise du discours, contradictions et réajustements

Twitter, par sa nature instantanée et publique, met en lumière la fragilité et la réversibilité des propos présidentiels. Les dirigeants sont exposés à une mise en cause rapide lorsqu'ils ne respectent pas leurs engagements initiaux ou adoptent des positions fluctuantes, comme cela a pu être observé autour des questions sensibles telles que la fermeture des frontières, la vaccination ou les couvre-feux.

Ces contradictions ou imprécisions peuvent entamer la crédibilité des présidents, en alimentant les doutes et les critiques sur leur cohérence et leur capacité à maîtriser la situation (Fairclough, 2015). Le format concis de Twitter ne facilite pas toujours la nuance, amplifiant parfois l'ambiguïté des messages.

Face à ces défis, les présidents procèdent à des réajustements discursifs, tentant de restaurer leur légitimité par des clarifications, des appels à la confiance ou des repositionnements stratégiques. Ce phénomène illustre la dialectique constante entre maîtrise du discours et nécessité d'adaptation dans un environnement médiatique mouvant (Chilton, 2004).

Ainsi, Twitter devient un terrain où se jouent non seulement la communication politique, mais aussi la gestion des crises discursives et la négociation de l'autorité présidentielle. C'est ce que Van Dijk (2008) appelle un effet de saturation du discours, où la répétition affaiblit la parole présidentielle, et où l'interactivité immédiate expose à la critique publique.

5. Conclusion

L'analyse des tweets de crise d'Emmanuel Macron et de Kais Saied révèle deux stratégies discursives distinctes mais convergentes dans leur visée : rassurer, légitimer, mobiliser. Macron s'inscrit dans une tradition républicaine de gestion collective, structurée par la raison et la transparence, tandis que Saied articule sa parole autour de la souveraineté nationale et de l'identité tunisienne. Twitter, loin d'être un simple relais, devient un véritable espace de performance discursive, où se jouent la crédibilité politique, l'adhésion citoyenne et la maîtrise symbolique de la crise.

Ces discours, bien que soigneusement construits, restent exposés à leurs propres limites : saturation, contradictions, fragilité de l'autorité énonciative. En définitive, la pandémie aura été autant une crise sanitaire qu'une crise du discours politique, révélant la tension permanente entre l'urgence de dire et le devoir de convaincre.

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Lucidité Postcoloniale ou Continuité Stratégique ? Analyse Communicationnelle du Discours d'Emmanuel Macron sur l'Afrique (Conférence des Ambassadeurs, 6 Janvier 2025)

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Résumé

Cet article propose une analyse critique des douze minutes que le président français Emmanuel Macron consacrait à l'Afrique dans son allocution du 6 janvier 2025 devant la conférence des ambassadeurs. Nous montrons que ce discours, qui conjugue empathie stratégique et fermeté lexicale, vise à retisser un récit d'autorité française dans un espace africain devenu multipolaire. **De ce fait**, nous allons mobiliser les cadres théoriques de Foucault (gouvernementalité), Saïd (production discursive de l'altérité), Bourdieu (violence symbolique) et Mbembe (subjectivations postcoloniales). Par conséquent, cette étude va essayer de mettre au jour les mécanismes par lesquels la parole présidentielle tente de compenser le reflux d'influence par la performativité du verbe.

Mots-clés: discours présidentiel, gouvernementalité, postcolonialité, stratégies d'influence

Abstract

This article offers a critical analysis of the twelve-minute Africa segment in French President Emmanuel Macron's speech to the 2025 Ambassadors' Conference. Combining strategic empathy with lexical firmness, the address seeks to re-articulate French authority within an increasingly multipolar African arena. Drawing on the theoretical frameworks of Foucault (governmentality), Said (discursive production of alterity), Bourdieu (symbolic violence) and Mbembe (post-colonial subjectivation), the study reveals how presidential discourse compensates for dwindling influence through the performativity of language.

Keywords: presidential discourse, governmentality, post-coloniality, influence strategies

1. Introduction

La redistribution des hiérarchies de puissance caractéristique du nouvel ordre multipolaire fait de l'Afrique un théâtre de rivalités où le capital symbolique français, hérité d'une longue histoire coloniale et sécuritaire, est de plus en plus contesté. C'est dans ce contexte que le président Emmanuel Macron. Ce dernier ouvrit la conférence des ambassadrices et des ambassadeurs le 6 janvier 2025, et affirme: "*La France n'est pas en recul en Afrique, elle est simplement lucide; elle se réorganise*"⁶⁶. Cette déclaration, place la *lucidité* au cœur d'un récit

⁶⁶ Macron, E. (2025). *Discours à la conférence des ambassadeurs de France* [Vidéo]. France 24. <https://youtu.be/FedhcsxOLQ8>.

de réagencement et constitue le point de départ de notre analyse. En adoptant la perspective foucauldienne de la gouvernementalité, nous abordons la parole présidentielle comme un dispositif performatif destiné à stabiliser des rapports de pouvoir fragilisés. Dans le même mouvement, la critique postcoloniale (Saïd; Mbembe) nous aide à saisir les modalités par lesquelles le discours reconstruit une légitimité française tout en délégitimisant les voix panafricanistes d’ “instrumentalisées.”⁶⁷ Dès lors notre corpus se compose de la transcription officielle de l’allocution, corrélée à sa réception médiatique et diplomatique. À travers une analyse critique du discours et un codage thématique manuel, nous dégageons les tensions structurantes telles que le “partenariat versus tutelle, lucidité versus ingratitude” qui configurent ce moment discursif. *En outre*, notre objectif est double : révéler les continuités stratégiques dissimulées sous l’appel à la réciprocité et contribuer au débat académique sur la performativité des récits postcoloniaux à l’ère d’un multilatéralisme fragmenté.

2. Cadre théorique et méthodologie

2.1 Ancrage conceptuel : discours, pouvoir et stratégie

Notre dispositif théorique se déploie sur trois strates complémentaires :

- a. **Gouvernementalité et pouvoir symbolique:** dans la lignée de Foucault (1978) et de Bourdieu (1982), nous considérons la parole présidentielle comme un “*instrument de gouvernement*” : elle régule les conduites par la performativité du verbe et la production de catégories légitimes (“partenariat,” “souveraineté,” “félicitations,” mais aussi “clarté” ou “fermeté”).
- b. **Narratives stratégiques et diplomatie publique:** notre analyse mobilise la théorie des *strategic narratives* (Miskimmon, O’Loughlin & Roselle, 2013) et la notion de *soft power* (Nye, 2004) pour éclairer la fonction géopolitique du récit dans le but de re-territorialiser l’influence française dans un espace africain où la concurrence sino-russo-turque s’intensifie.
- c. **Performativité et cadrage médiatique:** De surcroît, le cadre de la *critical performativity* (Chouliarakis, 2013) et la *frame theory* (Entman, 1993) nous permettent de saisir les mécanismes d’inclusion / exclusion (naming, blaming, silencing) qui produisent la scène franco-africaine comme horizon d’action légitime.

2.2 Questions de recherche

Partant de ce socle théorique, notre réflexion s’organise autour de deux interrogations cardinales. La première interroge les modalités par lesquelles le discours présidentiel façonne un ethos qui oscille, selon une tension constitutive, entre l’ “humilité” revendiquée et l’autorité propre à la “directive stratégique.” Dans cette perspective, il s’agit de comprendre comment la parole présidentielle, au croisement de la rhétorique aristotélicienne de l’ethos et des dispositifs contemporains de communication politique, articule à la fois proximité symbolique et pouvoir performatif. La seconde question s’attache aux tensions discursives qui émergent lorsque le locuteur tente de concilier l’héritage postcolonial (entendu comme matrice mémorielle et relationnelle au sens d’Edward Saïd) avec les impératifs d’une diplomatie d’influence dans un ordre international désormais multipolaire. Ce questionnement engage une lecture foucauldienne des rapports de pouvoir, dans la mesure où le discours apparaît moins comme un simple vecteur

⁶⁷ Frioux-Salgas, S. (2020). *Voix panafricaines à Paris (1920-1950): De la Voix des Nègres à Présence africaine*. *Hommes & Migrations*, (pp. 135-141). <https://doi.org/10.4000/hommesmigrations.12273>

de persuasion que comme un dispositif stratégique de production et de régulation du sens. Ainsi formulées, ces deux interrogations ne se réduisent pas à l'exploration des mécanismes discursifs: elles ouvrent sur une analyse de la façon dont la parole présidentielle participe, à la fois, à la légitimation interne de l'autorité politique et à la projection externe d'une puissance cherchant à redéfinir sa place dans les reconfigurations géopolitiques contemporaines.

2.3 Corpus et sources

Le corpus primaire retenu s'articule autour de deux matériaux complémentaires. D'une part, la transcription officielle de la séquence dite « Afrique », publiée par la Présidence de la République française (Élysée, 2025), constitue la base textuelle de l'analyse. Ce document fournit un accès direct à la matérialité langagière du discours, permettant d'en examiner les structures lexicales, les choix d'énonciation et les procédés de mise en récit. D'autre part, la captation audiovisuelle de cette intervention constitue un matériau sémiotique essentiel : la gestuelle, la proxémique et la scénographie (angle de caméra, composition du cadre, mise en scène protocolaire) participent de la performativité discursive et dépassent la fonction d'illustration. À ce socle primaire s'ajoute un corpus secondaire, composé de travaux académiques et de contributions critiques permettant de situer le discours dans un espace de réception pluriel. Sur le plan scientifique, nous mobilisons notamment les analyses de Achille Mbembe (2020) sur les continuités postcoloniales, de Jean-François Bayart (2019) sur les logiques de dépendance et de « politique du ventre », ainsi que de Dominique Moïsi (2021) sur les enjeux géopolitiques de l'Afrique contemporaine. Sur le plan médiatique et politique, nous avons retenu des analyses publiées dans *Jeune Afrique* (Kane, 2025), *Le Monde Afrique* (Laurens, 2025) et *The Africa Report* (Ndiaye, 2025), qui offrent des lectures contrastées du discours présidentiel, oscillant entre scepticisme, critique et mise en perspective stratégique.

Ce dispositif croisé, associant le texte officiel, la performance audiovisuelle et la polyphonie critique issue des champs académique et médiatique, permet de dépasser la description linguistique stricto sensu. Il rend possible une compréhension élargie de l'acte de parole présidentiel comme événement discursif, inscrit dans une scénographie institutionnelle, dans des rapports de pouvoir géopolitiques et dans un imaginaire postcolonial en recomposition.

2.4 Procédure analytique

L'étude du discours présidentiel requiert un dispositif méthodologique pluriel. Elle doit rendre compte à la fois de la matérialité linguistique, des stratégies narratives et de la mise en scène institutionnelle. C'est pourquoi nous avons retenu une démarche qui associe l'analyse critique du discours, la narratologie et les études en communication politique. Ce choix se justifie par la nature hybride de l'objet : un discours diplomatique qui articule dimensions linguistiques, interactionnelles et symboliques, tout en s'inscrivant dans des rapports de pouvoir géopolitiques. Ainsi, la procédure analytique proposée ne juxtapose pas les outils, mais les met en dialogue afin de produire une lecture intégrée du corpus.

L'approche adoptée est progressive et structurée. Elle mobilise plusieurs instruments destinés à éclairer les différentes dimensions du discours. Tout d'abord, une analyse critique du discours inspirée de Fairclough (1992) a été appliquée. Elle se déploie sur trois niveaux: le niveau micro-linguistique, qui observe les choix lexicaux, la syntaxe et les figures de style; le niveau interactionnel, qui interroge l'organisation énonciative et les modalités d'adresse; et le

niveau socio-institutionnel, qui situe le discours dans ses rapports de pouvoir et dans son cadre diplomatique. Ensuite, un codage thématique a été conduit avec l'appui du "logiciel NVivo"⁶⁸.

Il s'appuie sur des lexèmes centraux tels que "respect," "partenariat," "lucidité" et "fermeté," mais aussi sur des champs lexicaux concurrents comme "panafricanisme" et "ingérence." En outre, ce travail a mis en évidence des régularités discursives ainsi que des zones de tension. De plus, une analyse de cadre narratif, fondée sur une "*frame matrix*,"⁶⁹ a permis de dégager quatre cadres dominants : réciprocité, responsabilisation, sécurité partagée et lucidité stratégique. Par ailleurs, les silences stratégiques ont été étudiés à partir de la grille de *negative representation* (KhosraviNik, 2015). Cette démarche révèle l'effacement discursif de certains acteurs concurrents, notamment la Russie, la Turquie et les Émirats arabes unis. De surcroît, une analyse multimodale de la scénographie institutionnelle, inspirée des travaux de Goffman (1974) et Scannell (2014), a été menée afin de corréliser posture corporelle, mise en scène symbolique et intention stratégique.

Enfin, la validité de l'analyse repose sur une triangulation méthodologique et théorique (Denzin, 1978; Flick, 2004). Chaque unité de sens a été confrontée à trois repères : les grilles issues des cadres théoriques mobilisés (Fairclough; Goffman; KhosraviNik); les catégories émergentes de l'analyse thématique ; et la littérature récente sur la communication stratégique d'État (Farwell, 2012; Paul, 2011) ainsi que sur le pouvoir communicant (Miège, 2010).

2.5 Limites et apports

La présente recherche se limite à l'analyse d'un moment discursif unique, et cette restriction impose une certaine prudence quant à la généralisation des résultats. Mais elle permet, en contrepartie, une observation détaillée des mécanismes rhétoriques et symboliques propres à un contexte diplomatique précis. Il faut rappeler que l'intérêt principal de ce travail scientifique réside dans l'articulation étroite entre trois dimensions: la parole présidentielle, l'environnement médiatique qui la relaie et l'arrière-plan postcolonial qui oriente sa réception. Or, c'est par cette triple mise en perspective que l'étude contribue à montrer comment la France, acteur qualifié d' "historique" et cependant de plus en plus contesté, mobilise la rhétorique du partenariat, et donc reconduit sa centralité stratégique dans l'espace africain.

3. Résultats de l'analyse

3.1 Le double registre "humilité / fermeté"

L'étude lexicométrique du corpus révèle que les occurrences renvoyant à l'ouverture dialogique ("respect", "partenariat", "écoute") coexistent, dans un rapport presque isonome, avec des segments qui affirment l'autorité de la France ("choix stratégiques," "clarté," "ligne rouge"). Toutefois, cette coprésence, loin d'être contradictoire, configure ce que Fairclough (1992) nomme une "*conciliation des inconciliables*"⁷⁰ : un discours qui neutralise la critique en affichant l'humilité tout en réinstaurant la hiérarchie. En outre, La tension performative

⁶⁸ Using NVivo: An Unofficial and Unauthorized Primer (<http://scalar.usc.edu/works/usingnvivo-an-unofficial-and-unauthorized-primer/index>).

⁶⁹ Boncek, J. (2003). *Studies in tight frames and polar derivatives* (Doctoral dissertation, University of Central Florida). University of Central Florida.

⁷⁰ Djavanmardi, S., & Abâsi, A. (2023). Analyse critique du discours selon Norman Fairclough dans *L'Enfant de sable* de Ben Jelloun. *Plume*, 19(37), 287-309.

s'apparente à ce que Bourdieu (1982) décrit comme l' "*euphémisation de la domination*," c'est-à-dire la capacité du locuteur institué à travestir la relation de pouvoir en échange délibératif.

Sous l'apparente réforme, le script postcolonial demeure, reformulé en régime de "*puissance aimable*" (Nye, 2011). Ici, l'humilité rhétorique fait office d'acte illocutoire d'apaisement, tandis que la fermeté constitue l'acte perlocutoire de re-légitimation. Dans ce contexte, la France s'expose comme partenaire tout en se réservant l'initiative stratégique, dans un emballage performatif renouvelé.

3.2 Silences et cadrages

L'invisibilisation des acteurs concurrents comme ; la Russie, la Turquie et les Émirats arabes unis doit être lue à l'aune de la théorie des « non-dits » de Derrida : "*... ce qui n'est pas nommé n'est pas seulement absent, il est symboliquement disqualifié.*" D'ailleurs, la scène discursive se resserre sur un face-à-face franco-africain, procédé que Goffman (1974) analyserait comme "*un cadrage interactionnel destiné à réduire la complexité stratégique.*" En effet, cette stratégie d'omission réalise une double opération. D'abord, elle protège l'image d'une centralité française intacte et elle minore la reconfiguration multipolaire du continent. Partant des termes de géopolitique symbolique (Miège, 2010), explique que le silence vaut "*acte performatif.*" Cependant, il occulte la perte d'exclusivité pour produire l'illusion d'un "*dialogue singulier.*" Ainsi, L'effet de vraisemblance créé, permet à la France de conserver la position d'interlocuteur naturel, alors même que les indicateurs économiques et sécuritaires documentent un rééquilibrage rapide au profit de nouveaux partenaires. De ce fait, Les silences fonctionnent comme des "*zones tampons discursives*" (Chouliaraki, 2006) en produisant des espaces d'invisibilité où se réfugie la souveraineté symbolique française.

3.3 Redéfinition contingente de la légitimité

Le procédé consiste à délégitimer le "panafricanisme postcolonial" qualifié de "posture idéologique", tout en promouvant des voix africaines jugées "constructives." En réinscrivant ainsi la légitimité dans un régime d'énonciation contrôlé, le président réactive ce que Mbembe (2010) identifie comme la "hiérarchisation des subjectivités africaines." Il s'agit, pour reprendre Laclau (2005), de reformater l'espace des revendications afin de recentrer la chaîne d'équivalence autour d'un pôle modéré, plus conforme aux intérêts français. Cette redéfinition est contingente, car elle dépend de la capacité performative de la France à désigner qui parle au nom de l'Afrique. Or les sociétés civiles, traversées par des dynamiques de réseaux numériques horizontaux (Castells, 2012), réclament une autonomie symbolique que la verticalité narrative française contraint. L'écart entre le discours de co-construction et la pratique de tri des interlocuteurs génère ainsi un défaut de résonance (Honneth, 2011) susceptible d'alimenter le ressentiment et d'accroître l'adhésion aux contre-narratifs concurrents ; en particulier ceux qui mobilisent la mémoire coloniale pour délégitimer toute prétention française à la centralité.

3.4 Une "économie morale" de la gratitude

En déclarant : "Je crois qu'on a oublié de nous dire merci", puis en imputant ce silence à un "*manque de courage*" des gouvernants africains. Le chef de l'État introduit un registre de dette symbolique qui transforme l'action militaire française en créance morale. Cette posture renvoie à ce que Boltanski définit comme une "*logique du réquisitoire*" : celui qui a "*sauvé possède un droit à la reconnaissance, et celui qui ne remercie pas est assigné au rang d'acteur moral déficient.*" Sur le plan pragmatique, l'ingratitude est présentée comme un blocage objectif de la

coopération. Mais sur le plan symbolique, elle reconfigure l'ancienne asymétrie coloniale en dispositif “*transactionnel de reconnaissance*.” C’est à dire un transfert de capital symbolique que Bourdieu nommerait “*crédit d’honneur*.”

3.5 La narrativisation de la “réorganisation” militaire

Lorsque Macron insiste sur le fait que “*la France n’est pas en recul ... elle se réorganise* » et qu’« *on a choisi de bouger*,” il effectue un cadrage de la déprise comme agentivité. Cette formulation relève de la “*storyline stratégique*” (Entman: Framing) qui inverse la causalité. C’est-à-dire ; l’expulsion des bases sahéliennes est re-racontée comme un choix concerté, alors que les données factuelles indiquent des retraits contraints. Au sens de Goffman, il s’agit d’un “*re-keying narratif*” : une transformation du ton (*retrait subi* → *réorganisation lucide*)⁷¹ destinée à sauvegarder la face de la puissance et à maintenir l’ethos de la rationalité française.

3.6 L’Afrique Promue “continent d’opportunités” : un tournant performatif néolibéral

À mi-discours, l’orateur (monsieur Macron) qualifie le continent de “*continent d’opportunités*” et annonce le rapatriement des logiques d’investissement vers le Nigeria, le Kenya ou l’Afrique du Sud. Le vocabulaire de l’“*opportunité*” traduit ce que Brown appelle la “*rationalité néolibérale*”⁷², ou l’espace politique est re-codé en marché potentiel, et la diplomatie se reconfigure en courtage de risques et de rendements. Car, en conjuguant cette rhétorique au référent militaire révisé (“*nouveau partenariat de défense*”), Macron construit une chaîne sémantique sécurité-investissement qui légitime la présence française sous la bannière de la “*prosperity-security nexus*.”⁷³

3.7 Gestion stratégique de la mémoire et déplacement du blâme

L’invocation expresse du passé militaire français (“*aucun d’eux ne serait aujourd’hui avec un pays souverain si l’armée française ne s’était pas déployée*”) opère une “rétro-prospection” (Ricoeur): le passé héroïque proposé par l’orateur formate le futur souhaité. Pourtant, la référence est sélective: ni Guelma Kherrata, ni Thiaroye, ni Barkhane, ni les controverses sur le franc CFA ne sont nommées. D’ailleurs, ce régime de nomination partielle s’apparente à la “politique du hors-champ” décrite par Achille Mbembe ou “*les zones de mémoire négative sont reléguées à la périphérie du récit pour laisser place à un passé militaro-protecteur*”⁷⁴. En conséquence, la critique anti-française est réinterprétée comme ingratitude plutôt que comme effet retardé d’un trauma colonial en déplaçant la responsabilité des tensions vers les opinions publiques africaines.

⁷¹ “**Se réorganise**” (militaire) — Terme utilisé par Macron pour présenter le retrait des bases sahéliennes comme un choix stratégique. Voir la retranscription intégrale publiée sur lafranceinsoumise.fr, 8 janvier 2025.

⁷² Brown, W. (2015). *Undoing the demos: Neoliberalism’s stealth revolution*. The MIT Press. <https://doi.org/10.2307/j.ctt17kk9p8>

⁷³ “**Continent d’opportunités**” — Expression adoptée pour repositionner l’Afrique dans une logique de marché et d’investissement (« prosperity-security nexus »). Source : synthèse de la conférence par *Prospective-Innovation.org*, 9 janvier 2025.

⁷⁴ Juompan-Yakam, C., & Soudan, F. (2020, août 29). Achille Mbembe: “*La mémoire des luttes anticoloniales réveille des questions dérangeantes*.” Jeune Afrique. <https://www.jeuneafrique.com>

4. Discussion

Les résultats convergent pour accréditer la thèse d'une "*continuation stratégique*": loin d'entériner une rupture, la séquence africaine consolide un dispositif d'influence française qui se requalifie sans se déconstruire. Or ce maintien s'éclaire lorsqu'on replace le discours dans la dynamique plus large de *l'épuisement des anciennes frontières d'accumulation capitaliste*⁷⁵. Depuis la fin de la guerre froide, l'Asie du Sud-Est, l'Europe de l'Est puis l'Amérique latine ont successivement été intégrées aux chaînes globales de valeur. Les marges de croissance s'y resserrent ; la transition énergétique raréfie les rentes fossiles ; les espaces extra-territoriaux (Arctique, fonds marins) demeurent politiquement et technologiquement coûteux. Dans ce contexte, *l'Afrique apparaît comme la dernière "frontière extractive" disponible*. Et c'est tout à fait l'idée que Harvey (2003) conceptualise sous le terme "*accumulation by dispossession*" et que Carmody (2020) décrit comme un "*new scramble for Africa*."

4.1 Du "continent d'opportunités" à la frontière d'accumulation

Lorsque le président qualifie l'Afrique de "*continent d'opportunités*," il participe à la "*frontierisation*" du continent. Plus exactement, la ressource (terres rares, marchés urbains, main-d'œuvre jeune) y est pensée comme potentielle plutôt qu'actuelle, ce qui justifie l'anticipation stratégique. Dans ces conditions, la diplomatie n'est plus l'art d'aménager les relations interétatiques ; elle se transforme en courtage spéculatif des droits d'accès à venir, un authentique marché à terme de la puissance géopolitique. Ainsi, la rhétorique du partenariat masque une logique de capture différée : sécuriser aujourd'hui l'image d'allié bienveillant pour verrouiller demain les flux de capitaux, de données ou de matières premières.

4.2 Grammaire postcoloniale et impératif néolibéral

Dans la logique qu'Antonio Gramsci (1971) désignerait comme une "*hégémonie réarticulée*," où le consentement est sans cesse produit et reproduit. Et que Manuel Castells (2012) situe à l'intersection des "*spaces of flows*" et des "*spaces of places*," la frontierisation actuelle réinvente l'autorité post-coloniale par des dispositifs de communication stratégique. L'État français met en œuvre un agenda-setting géo-économique (McCombs & Shaw, 1972) qui ancre, dans l'imaginaire des décideurs africains, l'idée qu'ouvrir les secteurs de l'énergie, du numérique et de l'agro-industrie au capital hexagonal constitue le chemin le plus sûr vers la prospérité. D'ailleurs, cette ingénierie narrative (Miskimmon, O'Loughlin & Roselle, 2013) s'appuie sur une modulation affective (respect, écoute) tout en préservant la verticalité diplomatique. Elle relève aussi, d'une véritable géo-économie discursive, où la parole construit des "*options futures*"⁷⁶ et oriente les flux de capitaux avant même leur matérialisation, selon la logique du "*marché à terme symbolique*" (Nye, 2011). Parallèlement, une gouvernementalité algorithmique (Rouvroy & Stiegler, 2016) optimise la diffusion de ces récits : les plateformes numériques amplifient les messages favorables, atténuent les voix adverses et transforment la sphère publique africaine en zone-tampon informationnelle. La tutelle narrative se fait alors courtier d'accès, en persuadant les élites qu'il est stratégiquement rationnel de confier leur "*dernier espace*"⁷⁷ à un partenaire historique plutôt qu'à de nouveaux concurrents comme la

⁷⁵ "**Frontière d'accumulation**" — Concept emprunté à David Harvey : *The New Impérialisme* (Oxford University Press, 2003). Mobilisé dans le texte pour éclairer la requalification néolibérale de l'Afrique comme dernier espace extractif mondial.

⁷⁶ Searle, J. R. (1969). *Speech acts: An essay in the philosophy of language*. Cambridge University Press.

⁷⁷ Kane, C. H. (2018, août 31). L'Afrique n'existe plus, elle a été dépossédée de son espace. *Le Monde Afrique*. <https://www.lemonde.fr/afrique/>

Russie, Turquie et Émirats arabes unis. Nous assistons ainsi à une hybridation de la puissance ou la force militaire s'efface au profit d'un levier communicationnel. Et, qui aligne impératif néolibéral et continuité post-coloniale sans jamais les nommer explicitement.

4.3 Vers une dialectique de la dépendance renouvelée

Ainsi, *la pénurie d'espaces exploitables hors d'Afrique* renforce l'intensité de la compétition symbolique autour du continent; elle explique la sophistication discursive observée dans les douze minutes analysées. La France, coincée entre son héritage colonial et la raréfaction mondiale des marges d'accumulation, tente de *convertir la continuité tutélaire en récit de co-construction* pour rester prioritaire sur la "dernière frontière." Mais ce mouvement enclenche une dialectique nouvelle : plus l'ancienne puissance revendique l'exceptionnalité de son lien historique, plus elle suscite la réactivation de mémoires blessées mobilisées par des acteurs concurrents⁷⁸.

5. Conclusion

Notre analyse met en évidence que l'allocution présidentielle du 6 janvier 2025 ne relève pas d'une rupture, mais d'un *aggiornamento* discursif où la repentance mémorielle s'articule à une fermeté stratégique savamment dosée. Elle atteste, dès lors, de la fécondité d'une approche qui conjugue l'analyse critique du discours (Fairclough, 1992) et la sociologie du pouvoir symbolique (Bourdieu, 1982). En outre, elle illustre la capacité de ces outils à dévoiler les continuités implicites d'un récit qui se présente pourtant comme novateur.

Notre codage thématique, appuyé sur une lexicométrie fine, montre que la catégorie du "partenariat" fonctionne comme un écran rhétorique : elle renomme une relation hiérarchique ancienne, or elle n'en modifie nullement l'ossature postcoloniale. Ce déplacement terminologique se donne pour une modernisation diplomatique, mais il reconduit, sous des formes euphémisées, les asymétries héritées. De surcroît, il opère un glissement sémantique qui prétend neutraliser les fractures mémorielles tout en préservant la centralité française. Par ailleurs, le retrait militaire du Sahel confirme ce constat, car l'événement n'est jamais désigné comme un désengagement, mais systématiquement présenté comme une "réorganisation". Ce choix discursif agit comme un "reframing stratégique,"⁷⁹ car il convertit un repli contraint en geste d'autorité souveraine. En parallèle, il confère au langage une fonction performative qui dépasse la simple transmission d'information, puisqu'il redéfinit la perception même d'un tournant diplomatique majeur.

En convertissant une éviction contrainte en un geste volontaire, Paris met en scène ce que Mbembe (2001) appelle un "futur antérieur": annoncer dès aujourd'hui la situation qu'elle souhaite revendiquer demain. Cependant, les silences du discours demeurent lourds de sens. Ils concernent l'occultation des concurrents russe, turc et émirati. Ils se traduisent aussi par le déni de l' "accumulation par dépossession" (Harvey, 2003), dissimulée derrière le label séduisant de "continent d'opportunités." Pourtant, ces omissions trahissent la persistance d'un schème paternaliste, ravivé par la plainte récurrente sur l'ingratitude africaine. Dès lors, la légitimité

⁷⁸ Dramé, P. (2014). *Le Tiers-Monde postcolonial : espérances et désenchantements* (chapitre "Indépendance et dépendance: les intérêts économiques français en Afrique de l'Ouest (1960-1980)"). In *Le Tiers-Monde postcolonial: espérances et désenchantements* (dir. Maurice Demers & Patrick Dramé). Montréal : Presses de l'Université de Montréal.

⁷⁹ Dorst, K., & Watson, R. (2020, août). *Recadrage et transformation stratégique*. Dans *DRS 2020 Conférence internationale : Synergie*, Brisbane. <https://doi.org/10.21606/drs.2020.130>

apparaît comme le point de fragilité central d'une stratégie qui, tout en mobilisant la douceur du soft power (Nye, 2004), reconduit la verticalité d'hier. Quoi qu'il en soit, tant que Paris conservera le privilège de définir le tempo des engagements, la grammaire d'égalité demeurera performative plutôt qu'affectuelle. Le risque est alors de voir se confirmer l'avertissement de Fanon (1961), selon lequel la violence morale de l'ordre colonial se recompose sous le vernis du dialogue. Dès lors, loin d'annoncer une rupture, le discours présidentiel s'inscrit dans une dramaturgie de continuité. La reconnaissance apparente et la réorganisation militaire sont mises en récit comme autant de preuves de souveraineté retrouvée, tout en demeurant hantées par les spectres d'une hiérarchie coloniale jamais totalement abolie.

De manière consécutive, la viabilité de la posture française exige davantage qu'un simple toilettage lexical : elle requiert une redistribution effective du pouvoir de dire et d'agir. Cela implique, d'une part, une coproduction authentique des récits stratégiques avec les élites africaines et, d'autre part, un transfert concret de ressources et de technologies susceptible de matérialiser l'idée de "souveraineté partagée." Or, à défaut d'un tel déplacement, le discours présidentiel apparaît comme une ingénierie discursive sophistiquée où la rhétorique de l'égalité sert d'écran, masquant la persistance d'une verticalité soigneusement reconfigurée. L'allocution étudiée témoigne ainsi d'une malice stratégique. En mobilisant un lexique de partenariat et de respect mutuel, Emmanuel Macron cherche moins à transformer les fondements des relations franco-africaines qu'à reconvertir la contrainte en opportunité symbolique. En parallèle, le vocabulaire de l'"autonomie" et de la "co-construction" fonctionne comme un dispositif d'anticipation. Il vise à neutraliser les critiques futures tout en préparant le terrain pour une redéfinition des intérêts français sous le signe du "futur antérieur" (Mbembe, 2001). En addition, les omissions du discours, qu'il s'agisse des puissances concurrentes ou des mécanismes d'"accumulation par dépossession" (Harvey, 2003) révèlent que la stratégie présidentielle repose sur une double opération: effacer les antagonismes présents pour mieux préserver une centralité française fragilisée. En ce sens, Macron recompose l'ancienne tutelle en vernis dialogique en faisant de l'Afrique non pas un partenaire souverain, mais le miroir grossissant des incertitudes françaises dans un monde multipolaire.

Ainsi, le discours analysé dépasse la simple rhétorique. Il construit une performativité qui proclame l'égalité tout en reproduisant subtilement l'asymétrie des rapports. Tant que le rythme des engagements reste défini de manière unilatérale, la "grammaire d'égalité" demeure avant tout symbolique. Parallèlement, sous l'apparat de la modernité diplomatique, se révèle la ruse d'un État en repositionnement, capable de transformer des contraintes historiques en opportunités stratégiques. L'Afrique demeure l'espace privilégié de cette reconversion symbolique, mais la complexité du jeu de pouvoir exige vigilance et lucidité. Dès lors, l'examen attentif de ce discours incite non seulement à décrypter la sophistication des stratégies présidentielles, mais également à questionner la nature réelle de l'égalité proclamée et la capacité des acteurs africains à réaffirmer leur souveraineté face à des pratiques qui, sous couvert de modernité, perpétuent des hiérarchies anciennes.

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L'ironie du sort dans *Le lanceur de dés* de Mahmoud Darwich

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Résumé

Dans son poème culte, intitulé "Le Lanceur de dés," Mahmoud Darwich développe un discours poétique articulé autour de deux axes étroitement liés: la crise identitaire et l'ironie du sort⁸⁰. La question fondamentale sur laquelle s'ouvre le texte "*qui suis-je pour vous dire ce que je vous dis ?*" évoque l'interrogation d'un poète se confrontant à une réflexion existentielle sur sa propre identité. La lecture du poème révèle, en fait, la figure d'un " moi " à la fois fuyant, opaque et traversé d'ambiguïtés, demeurant inintelligible tant pour autrui que pour sa propre conscience. L'identité du poète se construit sur un mode marqué par le doute et la dénégation, ce qui explique la récurrence d'éléments textuels faisant référence aux aléas du hasard, à la mort, à la prophétie, à la chance et au jeu. Par conséquent, Darwich ne s'identifie pleinement ni à ce qu'il a été, ni à ce qu'il sera, échappant ainsi à toute tentative de réduction ou de fixation identitaire. En effet, de cette rupture naît une crise intime qui dépasse la seule personne du poète pour englober à la fois sa patrie, la Palestine, et le texte que nous lisons. En (se) demandant "Qui suis-je pour vous dire ce que je dis ?", il met en doute non seulement sa propre identité, mais aussi l'identité poétique de son œuvre. *Le lanceur de dés* met donc en scène une crise identitaire plurielle, touchant à la fois l'homme, le pays et l'écriture. La présente étude se propose d'analyser cette crise en la replaçant dans la perspective du motif central de l'ironie du sort.

Mots-clés : discours poétique ; crise ; jeu de dés ; ironie du sort

Abstract

In his iconic poem *The Dice Thrower*, Mahmoud Darwish develops a poetic discourse structured around two closely intertwined axes: the identity crisis and the irony of fate. The fundamental question with which the text opens, "Who am I to tell you what I am telling you?", evokes the inquiry of a poet confronting an existential reflection on his own identity. Reading the poem reveals a figure of the self that is elusive, opaque, and riddled with ambiguities, remaining unintelligible both to others and to its own consciousness. The poet's identity is constructed through doubt and negation, which explains the recurrence of textual elements referring to chance, death, prophecy, luck, and the motif of play. Consequently, Darwish fully identifies neither with what he has been nor with what he will be, thus eluding any attempt at reduction or fixation of identity. From this rupture arises an intimate crisis that extends beyond the poet himself to encompass both his homeland, Palestine, and the text we are reading. When he asks, "Who am I to tell you what I am telling you?", he questions not only his own identity

⁸⁰ Dans une perspective philosophique, l'**ironie du sort** exprime la tension entre la liberté humaine et le déterminisme des événements. Elle rappelle que, malgré la raison et la volonté, l'existence reste soumise à des forces extérieures : hasard, contingence, nécessité – qui échappent à tout contrôle. Ce concept souligne aussi l'écart entre l'intention et le résultat des actions humaines, rejoignant la « ruse de la raison » chez Hegel ou l'« ironie » chez Kierkegaard. Il interroge ainsi la justice et le sens du monde, où le malheur peut frapper l'innocent tandis que l'injuste est parfois épargné. L'ironie du sort révèle finalement la condition humaine : une liberté relative, toujours confrontée à l'imprévisibilité du réel.

but also the poetic identity of his work. *The Dice Thrower* thus stages a plural identity crisis, affecting the man, the country, and the act of writing itself. The present study sets out to analyze this crisis by placing it within the perspective of the central motif of the irony of fate.

Key-words: poetic discourse, crisis, dice game, irony of fate

1. Introduction

Le lanceur de dés et autres poèmes sont le titre des derniers poèmes de Mahmoud Darwich, réunis, un an après sa mort, dans un recueil dont la publication posthume a eu lieu en 2009. Pour l'ensemble des critiques qui se sont penchés sur l'étude de l'œuvre poétique du poète palestinien, ce recueil représente l'aboutissement de l'expérience esthétique et la pensée philosophique de son auteur. En fait, son poème "Le lanceur de dés" occupe une place particulière dans cette œuvre. Par son ampleur, plus de cinq cents vers, le poème s'inscrit dans une tradition qui n'est pas sans rappeler celle des grandes compositions antéislamiques, en particulier les Mu'allaqāt⁸¹, dont la longueur constituait déjà un signe de prestige poétique et un espace privilégié pour déployer une esthétique de la profusion. Ce texte révèle l'errance d'un homme qui cherche sans relâche son visage d'être et de poète, tel un enfant abandonné aux vents du destin, poursuivi par des questions lancinantes où se croisent la blessure de l'identité et le vertige de l'existence. Lié à jamais au nom de sa patrie, la Palestine, le poète retrace ici les instants ineffaçables de son parcours, de l'enfance aux ultimes vers. Il nous livre le récit d'une existence si ordinaire en apparence qu'elle en devient mystérieuse, comme si la simplicité recelait ses propres abîmes.

La question du "moi" occupe une place centrale dans l'ensemble du poème et contribue à dessiner l'image d'un poète en proie à une crise singulière. Le titre comme le contenu mettent en avant des concepts tels que l'ironie du sort, le hasard, la prophétie, la providence, la chance et la malchance, qui interviennent, toutes, dans la construction de l'identité du texte autant que dans celle de son auteur. "Texte" et "paratexte"⁸² concourent à délivrer le message philosophique et esthétique que Darwich destine à son lecteur. Ce dernier, interpellé directement, est amené à s'engager dans une démarche de co-création: en parcourant le poème mot après mot, vers après vers, il participe activement à la reconstruction du sens. Or, cette responsabilité ne peut être assumée pleinement que si le récepteur confronte le texte aux interrogations suivantes: comment le titre *Le lanceur de dés*, par sa force évocatrice, oriente-t-il une première lecture du poème ? En quoi l'ironie du sort nourrit-elle la crise identitaire et existentielle du poète aussi bien que celle de sa patrie ? Enfin, dans quelle mesure *Le lanceur de dés* peut-il être lu comme un poème sur le poème ?

⁸¹ Les Mu'allaqāt sont au nombre de sept. Selon la légende, il s'agirait de longs poèmes rédigés en lettres d'or et suspendus sur les murs de la Mecque. Cet héritage culturel témoigne de l'importance centrale de la poésie et du rôle éminent des poètes dans la vie des tribus arabes à l'époque antéislamique.

⁸² Selon Gérard Genette, le paratexte se divise en deux catégories complémentaires et exhaustives : le **péritexte** et l'**épitéxte**. Il écrit en effet : "péritexte et épitéxte se partagent exhaustivement et sans reste le champ spatial du paratexte ; autrement dit, pour les amateurs de formules : paratexte = péritexte + épitéxte" (Genette, *Seuils*, Éditions du Seuil, 1987, p. 7). Autrement dit, tout élément accompagnant le texte principal et servant de médiation entre l'œuvre et le lecteur relève soit du péritexte, c'est-à-dire des éléments internes au livre (titre, préface, notes, dédicace...), soit de l'épitéxte, c'est-à-dire des éléments externes à l'œuvre mais qui influencent sa réception (entretiens, correspondances, critiques, articles...). Cette distinction permet d'analyser de manière précise la manière dont le texte est présenté et perçu, en étudiant les effets de ses compléments discursifs sur la lecture et l'interprétation.

2. Le titre comme “seuil”⁸³ inaugural d’interprétation

Selon Genette (1987, p. 4), “l’œuvre littéraire se compose essentiellement du texte et du paratexte.” Il en découle qu’une interprétation pertinente d’une œuvre suppose l’examen attentif et la mise en valeur des messages inscrits dans son environnement programmatif. Selon cette perspective, les significations portées par le titre doivent être pleinement prises en compte par le lecteur car il s’agit d’un élément constituant l’un des premiers seuils d’accès au texte.

Cela dit, il importe de rappeler que la poésie possède ses propres spécificités en tant que genre littéraire. Dans un recueil, chaque poème constitue une unité sémantique et esthétique autonome, susceptible d’être lu indépendamment des autres textes qui l’accompagnent. De surcroît, le fait que chaque poème soit doté d’un titre renforce l’importance de ce paratexte dans l’interprétation du discours poétique. Dans cette perspective, avant même d’interroger le contenu du poème de Darwich intitulé “Le lanceur de dés,” il paraît nécessaire de s’arrêter d’abord sur la force évocatrice de ce seuil textuel.

Il est aisé de constater que le titre de ce poème occupe une place centrale dans la totalité de l’œuvre, puisqu’il a été retenu pour intituler l’ensemble du recueil. En fait, les responsables de l’édition posthume de l’œuvre de Darwich ont choisi l’intitulé *Le lanceur de dés et autres poèmes*. Ce choix n’est pas anodin : conscients de l’importance stratégique d’un titre dans la réception d’un ouvrage - rappelons, qu’ “un beau titre est le vrai proxénète d’un livre”⁸⁴ - les éditeurs ont mis en avant ce poème emblématique afin de garantir au recueil une visibilité maximale auprès du lectorat. Il convient, toutefois, de souligner que Darwich, qui projetait de publier ses derniers poèmes récités lors de rencontres culturelles, n’a pas été directement à l’origine de ce choix, puisque la mort soudaine qui l’a emporté, des suites d’une crise cardiaque, l’a empêché d’en décider lui-même.

C’est, donc, la source éditoriale qui en est à l’origine; et il ne fait guère de doute que ce choix n’a rien d’arbitraire. Pour un lecteur soucieux d’interpréter le contenu de cette œuvre poétique, il importe, dès lors, de s’interroger sur les significations possibles de cet élément paratextuel. Comme le rappelle Genette, “le plus souvent [...] le paratexte est lui-même un texte [; et] s’il n’est pas encore le texte, il est déjà du texte” (Genette, 1987, p. 9).

Ainsi, il devient légitime de s’interroger : sur quelles bases a été arrêté le choix de ce titre, d’autant plus que le poète n’en porte aucune responsabilité directe? Selon la terminologie de Genette, *Le lanceur de dés et autres poèmes* apparaît à la fois comme un titre thématique et un titre formel (ou générique)⁸⁵. Il suggère, d’une part, par la métaphore du « lanceur de dés », un contenu ou une tonalité symbolique de l’œuvre, et, d’autre part, précise son genre littéraire en signalant qu’il s’agit d’un recueil rassemblant “d’autres poèmes.”

Quant au titre du poème, la figure du *lanceur de dés* revêt une portée particulièrement dense. Elle évoque l’image d’un destin placé sous le signe de l’aléatoire, de la contingence, mais aussi

⁸³ Le concept de “seuil”, forgé par Gérard Genette (1987), désigne le point liminaire à partir duquel s’ouvre l’espace de lecture et d’interprétation d’un texte. Nous avons choisi de l’utiliser dans le titre de la première partie de notre article, “Le titre comme “seuil ” inaugural d’interprétation,” pour souligner que le titre dépasse sa fonction informative et joue un rôle actif dans la lecture: il prépare, oriente et conditionne l’accès au sens du texte. Il agit ainsi comme une porte d’entrée qui guide le lecteur vers le sens du texte. Ainsi, le titre inaugure la rencontre entre l’œuvre et son lecteur, orientant sa lecture et son interprétation.

⁸⁴ Antoine de Furetière, *Le roman bourgeois*, Pléiade, p. 1084.

⁸⁵ Genette, G. (1987). *Seuils*, op.cit., p. 74.

du jeu, comme si l'existence humaine n'était qu'une suite de coups lancés au hasard, sans maîtrise ni garantie de sens. Chez Darwich, cette métaphore est intimement liée à la crise identitaire: elle traduit une condition où l'homme – et, au-delà, le peuple palestinien – se trouve emporté par les aléas de l'histoire, privé d'assises stables et condamné à vivre dans l'incertitude.

De plus, l'intitulé résonne avec un intertexte majeur : le célèbre poème de Stéphane Mallarmé, "Un coup de dés jamais n'abolira le hasard," (1897). Sans qu'il s'agisse nécessairement d'un emprunt conscient, l'écho est indéniable : dans les deux cas, le geste du lancer traduit à la fois une défiance à l'égard de toute maîtrise absolue et une interrogation sur la puissance créatrice du langage poétique. Mallarmé, par ce poème expérimental, faisait du langage le lieu même où se joue l'impossible maîtrise du sens; Darwich, quant à lui, inscrit dans la figure du *lanceur de dés* le drame d'une identité individuelle et collective constamment exposée à l'imprévisibilité du destin. Ainsi, le titre, loin de n'être qu'un simple élément paratextuel choisi par les éditeurs, ouvre déjà une lecture possible du recueil: il place l'ensemble sous le signe du hasard, du jeu et de l'incertitude, mais aussi sous celui de l'acte poétique comme ultime tentative de rendre compte de l'ironie du sort et de la fragilité des certitudes.

Le titre *Le lanceur de dés* suscite d'emblée une série de questions : qui est ce lanceur de dés? Le poète lui-même, ou un personnage rencontré au détour de l'existence ? Faut-il entendre l'expression au sens littéral ou comme une métaphore ? Et surtout, comment cette image poétique peut-elle refléter la figure de l'auteur ? Ces interrogations révèlent que ce choix n'est nullement fortuit: il cherche à captiver le lecteur, à éveiller sa curiosité, à stimuler ses hypothèses de lecture et à étendre ses horizons d'attente, plaçant ainsi celui-ci dans une véritable co-crédation du sens.

L'analyse de la structure syntaxique du titre révèle qu'il est constitué d'un groupe nominal étendu. Le terme *lanceur*, dérivé du verbe *lancer*, désigne celui qui accomplit l'action, tandis que le *dé* se définit comme "un petit cube dont chaque face porte de un à six points (souvent noirs sur fond blanc)"⁸⁶ (Paul Robert, p. 616). Le *lanceur de dés* désigne donc, littéralement, celui qui s'adonne à ce jeu de société. Or, le jeu lui-même repose fondamentalement sur l'idée du hasard : nul ne peut prédire à l'avance la face sur laquelle le dé s'affichera. Partant, le joueur ne détient aucun pouvoir sur l'issue de la partie, qu'il s'agisse d'un gain ou d'une perte. D'un point de vue mathématique, discipline pourtant réputée pour sa rigueur, l'étude des probabilités appliquée au jeu de dés démontre que, quelle que soit son habileté, le joueur ne peut en aucune manière maîtriser ou optimiser de façon certaine le résultat de son lancer.

En effet, dans le cas d'un simple lancer d'un dé équilibré à six faces, la probabilité d'obtenir l'une quelconque des valeurs de 1 à 6 est strictement de 1/6. Ainsi, même pour un joueur expérimenté ou "talentueux," la probabilité de faire apparaître un six reste de 1/6, soit environ 16,67 %. Ce constat met en évidence que le lanceur de dés, en s'engageant dans ce jeu, accepte dès le départ d'être livré à la loi inévitable du hasard et de la chance. C'est pourquoi, dans notre imaginaire collectif, le jeu de dés en est venu à symboliser le sort fatal, l'imprévisibilité de nos décisions et, plus largement, la contingence de notre existence. Ce qui apparaît à la fois séduisant et absurde dans ce genre de jeu, c'est que le joueur, en y prenant part, accepte délibérément de se livrer lui-même au hasard. L'expression : "coup de dé"⁸⁷, selon *Le Nouveau Petit Robert*, désigne aussi "une affaire qu'on laisse au hasard." Dans ce cadre, l'habileté ou l'intelligence du lanceur n'ont que peu d'importance : qu'il soit adroit ou non, il ne peut compter

⁸⁶ Robert, P. (2008). *Le Nouveau Petit Robert*, op. cit. p. 616.

⁸⁷ Robert, P. (2008). *Le Nouveau Petit Robert*, op. cit. p. 616.

que sur la chance. Plus qu'un acteur, il devient presque un instrument du jeu, un joueur dont on se joue.

La comparaison avec le jeu d'échecs met encore plus en évidence cette passivité. Contrairement au lancer de dés, le jeu d'échecs repose sur un ensemble d'exigences intellectuelles précises : attention soutenue, capacité de planification, mémoire vive et sens stratégique. Le joueur d'échecs demeure maître de ses choix, assume pleinement ses décisions et porte la responsabilité de son succès ou de sa perte. C'est pourquoi ce jeu, valorisé par l'opinion publique, est recommandé pour développer l'intelligence des enfants et fait l'objet de compétitions internationales régulières depuis 1886, élevant ses champions au rang de figures d'exception.

À cet égard, il est intéressant de convoquer l'exemple du *Joueur d'échecs* de Stefan Zweig (1942), œuvre dans laquelle le jeu devient une métaphore de la lutte pour la survie intellectuelle. Le protagoniste principal Monsieur B, enfermé et privé de toute stimulation extérieure, parvient à préserver sa liberté de penser en se livrant à des parties d'échecs mentales. Dans cette œuvre, l'idée du jeu est investie comme étant l'expression de la résistance rationnelle contre la contingence et du chaos, mais très vite Monsieur B a frôlé la folie et est finalement battu par Mirko Czentovic.

Or, en choisissant l'image du "lanceur de dés," Darwich semble prendre le contre-pied de cette symbolique. Là où l'échiquier zweigien met en scène la souveraineté de l'intelligence, la rigueur stratégique et une victoire de l'homme sur la contrainte, le jeu de dés rappelle, au contraire, l'impuissance radicale de l'individu face au hasard, au destin et aux forces qui le dépassent. Ainsi, le titre *Le lanceur de dés* se charge d'une dimension existentielle : il figure un sujet qui, malgré sa volonté d'agir, demeure à la merci d'une fatalité insaisissable.

L'expérience biographique et poétique de Darwich semble entrer en résonance avec cette démarche aléatoire. La prise en considération du titre, élément central du paratexte, fournit au lecteur une clé de lecture essentielle : le poème qu'il introduit porterait sur l'état d'un poète en crise, hanté par la quête de soi et menacé par le vide du monde. Mais alors que Mallarmé tentait d'élaborer, à travers l'abstraction et la forme typographique, une poétique du hasard, Darwich, en tant que poète exilé, transpose le hasard dans l'expérience collective et historique de son peuple.

3. La crise identitaire et existentielle du poète et de son peuple

L'image du *lanceur de dés* est exploitée dans une dimension pleinement métaphorique. L'homme dont il est question est un "je" lyrique, qui dit "je" et qui assume l'énonciation comme une prise de parole existentielle. Le poète se met en scène en tant que sujet exposé à l'imprévisible: c'est l'idée du hasard, des aléas du sort et de la contingence de l'existence qui se déploie à travers cette allégorie.

Dès les premiers vers, le lecteur est saisi par la présence solennelle de cette première personne du singulier, qui ne renvoie pas seulement à un individu particulier mais au poète dans son rôle universel :

Qui suis-je pour vous dire
Ce que je vous dis,
Moi qui ne fus pierre polie par l'eau
Pour devenir visage

Ni roseau troué par le vent
Pour devenir flûte...⁸⁸

À travers cette ouverture, le poète se définit d'abord par le manque, par ce qu'il n'a pas été ou n'a pas pu devenir. L'énonciation prend ici une dimension ontologique, où le "je" s'interroge sur sa propre légitimité à dire "Je". Le texte s'ouvre sur une question rhétorique "*Qui suis-je pour vous dire / ce que je vous dis ?*" qui se répète à plusieurs reprises, agissant comme un leitmotiv structurant le poème. Cette interrogation traduit l'état d'inquiétude et d'angoisse d'un sujet en quête de soi, un être qui s'efforce de se comprendre tout en demeurant hanté par l'impossibilité apparente d'accéder à une réponse satisfaisante. La première étape de cette exploration identitaire se manifeste par l'emploi des adverbes de négation "ne" et "ni", suggérant que cette quête se déroule dans un climat de doute et de dénégation. Puis surgit l'affirmation centrale:

Je suis le lanceur de dés.
Je gagne des fois, je perds d'autres fois.
Je suis comme vous ou un peu moins...⁸⁹

Le "je" poétique se présente alors comme un être ordinaire, soumis au même destin incertain que tout homme, chancelant entre réussite et échec. Le lancer de dés devient la métaphore d'une vie où les choix de l'individu se trouvent constamment traversés par l'imprévisible et le hasard. Darwich ancre, en fait, son expérience singulière dans le sort d'un poète exilé, héritier d'un peuple dont le destin reste incertain.

Tel celui qui s'amuse à lancer des dés, et qui demeure impuissant devant l'issue du jeu, Darwich confesse qu'il n'est pour rien dans ce qu'il fut, dans ce qu'il est ou dans ce qu'il sera. Il s'abandonne à son sort, se laisse percevoir comme démuné de toute maîtrise sur son propre devenir, et reconnaît, dans un ton où perce l'ironie, que le hasard présida à tous les instants fondateurs de son existence: par hasard, il naquit près d'un puits; par hasard, il reçut son nom ; par hasard, il appartint à une famille dont il hérita traits, caractères et maladies. De même, à l'âge adulte, il ne décida pas librement de ses amours, ne fit rien d'héroïque pour se soustraire à la mort, et ne dut sa survie qu'à l'heureuse coïncidence d'un médecin de passage, grâce auquel il repoussa l'inévitable de "dix minutes," déjouant provisoirement le néant.

Ainsi, le poème se lit comme un long aveu où l'existence se révèle, aux yeux du poète, comme une succession d'événements fortuits, de coïncidences arbitraires et parfois absurdes. L'homme ne serait donc qu'un joueur malgré lui, prisonnier d'un jeu dont les règles lui échappent. Cette vision du monde, profondément marquée par l'expérience de la dépossession, rejoint l'angoisse existentielle qu'exprimait Mallarmé dans "Un coup de dés jamais n'abolira le hasard," mais aussi l'impuissance tragique du personnage central du *Joueur d'échecs* de

⁸⁸ Étant donné qu'il ne nous a pas été possible d'obtenir une version papier du recueil de Mahmoud Darwich *Le Lanceur de dés et autres poèmes*, nous avons choisi de nous appuyer sur la traduction réalisée par Elias Sanbar, accessible en ligne sur le site: [<https://fr.scrib.com>]. Il convient de préciser que, dans le cadre de cette étude, les exemples et citations tirés du poème seront présentés sans indication de numéro de page. Ce choix répond à une exigence de fidélité au support numérique consulté, qui ne reproduit pas la pagination de l'édition originale. Il permet également de conserver la cohérence du texte tout en respectant la source effectivement utilisée.

⁸⁹ Darwich, M. *Le lanceur de dés et autres poèmes*,
<https://fr.scribd.com/document/425291798/Mahmoud-Darwich-Le-Lanceur-de-Des>

Stefan Zweig: là encore, l'homme de culture et de conscience s'incline devant les forces obscures d'un destin qui le dépasse, battu par un adversaire rustre, inculte mais "prédestiné" au jeu. Dans ces trois univers poétiques, le hasard n'est plus une simple contingence: il devient le principe structurant d'une vie où l'identité elle-même se trouve suspendue à l'arbitraire, condamnant l'homme à errer dans une crise à la fois existentielle et identitaire.

Cela dit, la crise existentielle ne concerne pas seulement Darwich en tant qu'homme: elle s'étend à son peuple tout entier. L'image d'une patrie privée de liberté et broyée sous le joug de la colonisation traverse le poème en filigrane. Le lecteur la perçoit dans les allusions aux scènes quotidiennes du peuple palestinien, dont Darwich devient à la fois le témoin et la voix. En Palestine, suggère le poète, on ne vit pas vraiment: on survit, et l'on survit par hasard, simplement parce qu'on a échappé, par chance, à la mort. Sur cette terre dite "sainte" sacralisée elle aussi par hasard, l'existence se joue entre « prédateur et proie » ; la vie se poursuit, tantôt parmi "des martyrs," tantôt en devenant "témoin du massacre"; à tout moment, chacun peut être réduit, en plein jour et sous le regard du monde, à une simple "cible militaire."

Ainsi, l'identité et l'existence palestiniennes apparaissent comme livrées, elles aussi, aux caprices du hasard, de la coïncidence, de la providence, de la chance ou de la malchance. Cette condition historique et absurde est exprimée avec mélancolie dans ces vers : "Si les autres l'avaient emporté sur les autres/ Notre histoire humaine aurait d'autres intitulés." Ici, le poète rêve un autre avenir possible pour sa patrie, mais tout son discours demeure dominé par l'irréel: la conjonction "si" martelée, les verbes au conditionnel passé, le recours fréquent à la négation trahissent un horizon barré, où l'histoire s'avère prisonnière de ce qui aurait pu être et n'a pas été.

En ce sens, la destinée des Palestiniens se confond avec celle du poète : tous sont condamnés à vivre sous le signe du hasard et de l'absurde, incapables de décider de leur passé, de leur présent ou de leur avenir. La crise identitaire individuelle rejoint alors la crise nationale et historique, dans une même expérience de dépossession où l'homme et le peuple se voient déniés du droit élémentaire de choisir leur propre destin.

Cette dépossession historique et existentielle n'est pas sans rappeler l'univers tragique du *Joueur d'échecs* de Stefan Zweig. Dans la nouvelle, l'individu est enfermé dans un duel inégal: le prisonnier autrichien, privé de liberté et isolé du monde, tente de préserver son identité et sa raison en jouant avec l'imaginaire, mais finit par se heurter à une fatalité implacable. De la même manière, Darwich montre que ni lui, ni son peuple, ne tiennent les rênes de leur propre destin : ils sont contraints de jouer une partie dont les règles leur échappent, déterminées par des forces extérieures, hasard, guerre, colonisation, providence cruelle.

Chez Zweig, l'homme qui croit pouvoir s'arracher au néant par la maîtrise intellectuelle (les échecs) se retrouve écrasé par la mécanique absurde du jeu; chez Darwich, le Palestinien qui croit pouvoir décider de son existence découvre qu'il n'est que le jouet de coïncidences arbitraires et de contingences historiques. Dans les deux cas, la liberté est une illusion, la volonté individuelle un trompe-l'œil : qu'il s'agisse d'un joueur solitaire ou d'un peuple entier, l'identité se construit dans l'angoisse d'une partie dont l'issue est incertaine. Ainsi, ce que Zweig met en scène sur le plan psychologique, l'impossibilité de maîtriser sa vie face à une logique inexorable, Darwich l'élargit à l'échelle d'un peuple, faisant de la crise identitaire palestinienne une tragédie collective, inscrite dans le même registre de l'absurde et de la folie.

Dans son contenu, ce poème propose une véritable leçon philosophique sur l'essence de l'existence, la liberté de la volonté et la question du libre arbitre. Il interpelle à la fois son auteur et son lecteur, en les confrontant à l'interrogation universelle qui traverse toute l'histoire de la

pensée : “Qu’est-ce que l’homme?” ou dans la formule obsédante du poème : “Qui suis-je ?” Cette question, qui revient comme un refrain, engage une réflexion sans fin sur le lien entre le moi et son identité, entre l’homme et les forces qui le dépassent. D’un point de vue philosophique, l’identification du poète au “lanceur de dés” suggère une vision de l’homme radicalement opposée à celle de Sartre. Alors que l’existentialisme sartrien affirme que “l’existence précède l’essence” et que l’homme se définit par ses choix, le “je” envisagé par Darwich incarne un être fragile, impuissant face aux forces fatales qui le dépassent. Cette conception se rapproche davantage de celle de Spinoza, pour qui l’homme est déterminé par une puissance supérieure (Dieu ou la Nature) et se voit privé de toute autonomie véritable.

Dans le domaine littéraire, une telle vision rejoint aussi l’univers de *Jacques le fataliste* de Diderot, où le personnage principal, persuadé que “tout ce qui nous arrive de bien et de mal ici-bas est écrit là-haut,” expérimente l’impossibilité de maîtriser son destin. À l’instar de Jacques, le poète palestinien vit dans un monde régi par des lois incomprises, où le chaos et la nécessité façonnent chaque instant. Depuis sa naissance jusqu’à l’épisode où il s’adresse au médecin pour différer sa mort de “dix minutes,” Darwich, comme ses compatriotes, reste prisonnier d’une existence hasardeuse, soumise à une logique implacable qui lui échappe.

“Le lanceur de dés” peut ainsi être considéré comme un texte poétique qui met en scène une crise identitaire et existentielle, une vie gouvernée dans ses moindres détails par le non-sens d’un sort moqueur. L’homme que Darwich met en avant se trouve réduit à une figure de l’impuissance, déboussolé, égaré, incapable de s’ancrer dans un sens stable. Ce portrait reflète également la condition de son peuple, condamné à vivre dans une histoire écrite par d’autres et marqué par l’incertitude du lendemain.

Mais cette crise de l’homme déborde le cadre de la représentation et affecte jusqu’à l’écriture elle-même. Le poème, en effet, ne se contente pas de dire la crise: il la met en œuvre dans sa forme. Le retour obsédant de la question “Qui suis-je?”, les répétitions, les dénégations et les images paradoxales font du texte un espace traversé par l’hésitation et le doute. Ainsi, “Le lanceur de dés” n’exprime pas seulement un être en crise; il est lui-même un texte en crise, travaillé de l’intérieur par le vertige identitaire et la difficulté d’assigner un sens.

Le poème devient, alors, le miroir de ce qu’il dit : un champ d’instabilité où se manifeste l’impossibilité de fixer l’identité, le sens, le destin. Il illustre la condition moderne du poétique: une écriture qui ne prétend plus offrir des réponses définitives, mais qui expose l’homme et le langage à l’épreuve de l’incertain, de l’absurde, de l’agnostique.

4. La crise du texte poétique

Le lanceur de dés se lit également comme un poème sur le poème. Il ne se contente pas de dire la crise existentielle de l’homme, mais il enregistre aussi celle du langage et de la poésie elle-même. Ce texte est donc plus qu’un témoignage de désarroi: il est l’annonce de l’épuisement du texte poétique classique et les balbutiements d’une écriture moderne. Cette crise, telle que Darwich la met en scène, se manifeste à trois niveaux, qui sont la démystification du statut du poète, les conditions de la création du poème et le nouveau rôle attribué au lecteur.

En fait, le début du poème est significatif à cet égard: “Qui suis-je pour vous dire ce que je vous dis?”. Par cette interrogation inaugurale, Mahmoud Darwich remet en question non seulement son identité personnelle, mais aussi le statut du poète en tant que figure d’autorité. L’énoncé met en place les trois pôles de la communication poétique: le “je” de l’émetteur, le “vous” du destinataire, et le *message* désigné par “ce que je [...] dis.” Dans la tradition

classique, le poète occupe une position hiérarchiquement supérieure : inspiré par une muse ou un “djinn,” il est investi d’une mission quasi sacrée et considéré comme l’organe de vérité et de gloire de sa communauté.

Darwich renverse cette hiérarchie. Loin de se présenter comme prophète ou maître de la parole, il se place sur un pied d’égalité avec son lecteur, allant jusqu’à affirmer : “Je suis comme vous ou un peu moins.” Cette formule paradoxale manifeste une volonté de démythifier l’aura du poète, de lui ôter son caractère transcendant pour l’inscrire dans une condition humaine ordinaire, soumise aux aléas de l’histoire. Ainsi, au lieu de se poser en héritier des grands poètes arabes de l’ère antéislamique, figures de prestige, de défense et de fierté tribale, Darwich assume l’image d’un simple *diseur de mots*, dépouillé de tout statut surnaturel.

En déconstruisant ainsi la figure traditionnelle du poète, *Le lanceur de dés* inaugure une écriture moderne qui refuse la sacralisation du créateur et ouvre un espace d’égalité avec le lecteur. Le poète n’est plus celui qui dicte une vérité révélée, mais celui qui partage les doutes et les inquiétudes de son propre quotidien. Rappelons que, dans la tradition, le poète est vu comme un voyant, un prophète ou un guide inspiré par une transcendance. Darwich, au contraire, se met en scène comme un être ordinaire, impuissant, soumis au hasard et aux forces fatales. Loin d’être maître de sa parole, il devient simple témoin d’une parole brisée. Ce geste opère une démythification du mythe du poète inspiré : le poète cesse d’être l’oracle de la vérité pour devenir le miroir d’un doute universel.

La crise du discours poétique se lit également dans les coulisses de sa genèse. Contrairement à la vision traditionnelle qui fait de l’écriture un acte inspiré, presque sacré, *Le lanceur de dés* réduit le processus créatif à une opération fragile. Dès le départ, l’autorité du poète est remise en question : écrire n’est pas un privilège unique, mais une possibilité, sujette à l’incertitude. Cette incertitude qui prend toute sa force dans la métaphore maîtresse du poème : “Le poème est un jet de dés sur un carré d’obscurité, il éclaire ou n’éclaire pas⁹⁰.” Écrire n’est donc plus un acte maîtrisé ni le fruit d’un don divin : c’est une tentative risquée, soumise aux lois du hasard. Les mots eux-mêmes partagent ce destin incertain car “ils tombent alors ainsi que plume sur sable.”⁹¹

La légèreté de l’image traduit à la fois la fragilité du poème et l’impossibilité de garantir sa réception. Comme les dés, les mots peuvent s’éparpiller, se perdre, ne laisser aucune trace. Le poète avoue alors sa position de simple relais, loin de l’image stéréotypée de l’inspiré : “Je n’ai pour rôle dans le poème que d’obtempérer à sa cadence : mouvement des sens, chacun corrigeant l’autre, intuition qui révèle un sens, pâmoison dans l’écho des mots.”⁹²

De ce fait, le poème, loin d’être une construction harmonieuse et close, apparaît comme un texte marqué par la fragmentation, la répétition, l’ironie et la mise en question de son propre sens. L’acte d’écrire devient alors un acte fragile voire un combat avec le hasard, non plus la quête d’une forme parfaite. En ce sens, Darwich s’inscrit dans une modernité poétique proche

⁹⁰ Mahmoud Darwich, *Le Lanceur de Dés*, poème publié sur Scribd, <https://fr.scribd.com/document/425291798/Mahmoud-Darwich-Le-Lanceur-de-Des>

⁹¹ Mahmoud Darwich, *Le Lanceur de Dés*, poème publié sur Scribd, <https://fr.scribd.com/document/425291798/Mahmoud-Darwich-Le-Lanceur-de-Des>

⁹² Mahmoud Darwich, *Le Lanceur de Dés*, op. cit. <https://fr.scribd.com/document/425291798/Mahmoud-Darwich-Le-Lanceur-de-Des>

de celle de Mallarmé: “Un coup de dés jamais n’abolira le hasard,” où le langage ne promet plus la maîtrise mais met en scène son propre vertige.

Enfin, l’inspiration elle-même, moteur de la tradition poétique, est relativisée: “l’inspiration est la chance des solitaires” et “l’inspiration est l’atout du talentueux s’il s’applique.”⁹³ Elle n’est plus une faveur divine ni un souffle sacré, mais une chance, comparable à un coup de dés, lancé dans le vide. Ainsi, *Le lanceur de dés* incarne une conception moderne de l’écriture poétique, qui refuse toute certitude et expose la cassabilité du processus créateur. Le poème n’apparaît plus comme le produit d’un génie inspiré, mais comme un résultat précaire menacé par l’échec.

Le troisième niveau de la crise du texte poétique consiste dans sa réception. Comme l’écriture, la lecture se trouve elle aussi soumise au hasard et à l’imprévisible. Darwich l’affirme clairement: “Le poème est un jet de dés sur un carré d’obscurité.”⁹⁴ La réussite du poème ne dépend donc pas seulement de son auteur mais aussi et surtout de la capacité du lecteur à l’actualiser et à lui donner sens. Cette perspective marque une véritable révolution poétique. L’auteur n’est plus un demiurge souverain, “fondateur du Beau” et seul garant de la valeur du poème : il n’est plus qu’un “homme comme tous les autres ‘un simple scripteur.’ Je n’ai pour rôle dans le poème que d’obtempérer à sa cadence,”⁹⁵ avoue-t-il. Ce désengagement du poète laisse au lecteur la place d’un véritable co-créateur. Ainsi, le texte reconnaît explicitement que “*l’inspiration est la chance des solitaires*” et que rien ne garantit son efficacité. L’acte d’écriture n’atteint sa plénitude que lorsqu’il rencontre une lecture capable de le déchiffrer et de lui donner sens. Dans ce cadre, Darwich n’hésite pas à affirmer : “Le poème n’a pas qu’un poète” et il peut même “ne pas être lyrique.” Ces formules, radicales, ouvrent le champ de la poésie moderne: celle-ci n’appartient plus à une seule voix, mais se déploie dans une pluralité d’échos et d’interprétations.

Nous en déduisons que, face à ce texte éclaté et incertain, le lecteur n’est plus invité à recevoir une vérité dictée d’en haut, mais à participer activement à la construction du sens. L’ambiguïté, le recours aux images paradoxales et la prolifération des questions sollicitent son interprétation, l’obligent à entrer dans le jeu des aléas. Le poème ne “livre” plus son sens, il l’ouvre et le propose. Ainsi, “Le lanceur de dés ” illustre une mutation majeure : le poème n’est plus l’espace d’une vérité révélée, mais celui d’une expérience partagée du questionnement. Cette crise du texte poétique fait de Darwich à la fois l’héritier d’une tradition et le pionnier d’une écriture moderne qui assume l’instabilité et la pluralité des sens.

5. Conclusion

L’idée de l’ironie du sort constitue le pivot du “lanceur de dés”, poème qui porte simultanément l’empreinte d’un discours de la crise et d’une poétique en crise. La notion de crise est, en effet, indissociable, chez Darwich, de celle du hasard et de la fatalité: en se comparant au lanceur de dés, le poète dévoile une vision existentielle où l’homme, dépouillé de toute maîtrise sur son destin, n’a d’autre liberté que d’en prendre conscience.

⁹³Mahmoud Darwich, *Le Lanceur de Dés*, op. cit. <https://fr.scribd.com/document/425291798/Mahmoud-Darwich-Le-Lanceur-de-Des>

⁹⁴Mahmoud Darwich, *Le Lanceur de Dés*, op. cit. <https://fr.scribd.com/document/425291798/Mahmoud-Darwich-Le-Lanceur-de-Des>

⁹⁵Mahmoud Darwich, *Le Lanceur de Dés*, op. cit. <https://fr.scribd.com/document/425291798/Mahmoud-Darwich-Le-Lanceur-de-Des>

Cette conscience tragique débouche sur une redéfinition radicale du rôle du poète et du poème. Le poète n'est plus ce créateur absolu, maître de la parole et fondateur du Beau, mais un simple intermédiaire, parfois soumis à "l'inspiration, chance des solitaires" qui accepte que le texte échappe à son autorité. En contrepartie, le lecteur se voit attribuer un rôle central: il devient véritable co-créateur du sens poétique, capable de faire vivre le poème et d'en révéler les multiples possibles.

Ainsi, *Le lanceur de dés* n'est pas seulement l'expression d'une identité en crise: il est aussi une méditation sur l'avenir de la poésie. En plaçant le hasard, la contingence et la pluralité des lectures au cœur du processus créatif, Darwich a réussi à inscrire son œuvre dans une modernité où le poème ne se définit plus comme un monument figé, mais comme un espace mouvant, incertain et ouvert.

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La modalité d'obligation ou la crise du discours

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Résumé

Les crises que le monde d'aujourd'hui traverse connaissent plusieurs appellations. On parle de crise économique, crise sanitaire, crise sociale etc. Ces différentes crises ont touché aussi bien les citoyens que le discours de ces derniers. En effet, si on présume que le discours reflète un certain état de choses, un rapport de pouvoir, par exemple, qui se transforme en une crise qui s'établit entre les partenaires de l'acte de communication. Cela signifie que le sens du discours ne peut être saisi que dans l'instance du contexte d'énonciation. Cette crise crée des rapports conflictuels qui se manifestent clairement dans le comportement des interlocuteurs. Rapport de force, pouvoir, domination, action, incitation, obéissance, etc. telles sont les crises qui s'établissent entre le locuteur et son interlocuteur dans un échange interactif. Dans cette contribution, nous tiendrons à mettre en lumière les caractéristiques d'un discours en crise, notamment sur le plan linguistique. En fait, il est possible d'établir un lien étroit entre la modalité d'obligation et la crise discursive qui se noue entre le locuteur et son partenaire de communication.

Mots-clés: discours, crise, obligation, pouvoir, modalité, pragmatique

Abstract

The crises that the world is going through today have several names. We speak of economic crisis, financial crisis, health crisis, covid-19 crisis, etc. These different crises have affected both citizens and their discourse. Indeed, if we assume that discourse reflects a certain state of affairs, a power relationship, for example, this power relationship is transformed into a crisis that is established between the partners in the act of communication, which means that the meaning of the discourse can only be grasped in the instance of the context of enunciation. This crisis creates conflicting relationships that are clearly manifested in the way the interlocutors behave. Power relations, power, domination, action, incentive, obedience, etc. these are the crises that would be established between the speaker and his interlocutor in an interactive exchange. In this contribution, we wish to highlight the characteristics of a discourse in crisis, particularly on the linguistic level. In fact, it is possible to establish a close link between the modality of obligation and the discursive crisis that arises between the speaker and his communication partner.

Keywords: discourse, crisis, obligation, power, modality, pragmatic

1. Introduction

Tout locuteur qui s'engage dans un discours interactif s'efforce, selon son projet de sens, de choisir un lexique approprié dans le but d'agir sur l'autre, lui dicter des impératifs et par là lui imposer une certaine crise discursive. La crise discursive que nous voudrions étudier dépend du choix des mots auxquels le locuteur recourt, de son identité et des caractéristiques de la situation d'énonciation dans laquelle ce dernier s'implique. Dans cette optique, la modalité

d'obligation semble être parmi les outils linguistiques qui permettent d'imposer une crise du discours tant elle confère aux énoncés une valeur illocutoire à des "actes de langage direct ou indirect." Dès lors, la crise discursive que nous souhaitons analyser émane du positionnement énonciatif dont jouit le locuteur, donc de la configuration de soi. Il est devenu une affaire courante d'établir un lien, plus au moins étroit, entre l'action que produisent les mots et le pouvoir que tel ou tel locuteur possède pour influencer et agir fortement sur la psychologie de l'interlocuteur. En fait, tout discours est orienté et lié à la communauté dans laquelle il a été énoncé ; il est contextualisé, ce qui signifie que son sens ne peut être compris que dans le contexte d'énonciation.

Chaque discours véhicule un message. Ce message est exprimé par des moyens linguistiques traduisant la subjectivité du locuteur vis-à-vis de ce qu'il produit. La modalité d'obligation est parmi les outils linguistiques auxquels recourt le locuteur en vue d'afficher son attitude, sa position, son jugement, etc. Nous essayerons donc, dans ce présent travail, de comprendre l'intention communicative que le locuteur veut imposer à son interlocuteur quand il emploie ladite modalité. Crise de discours, force, action, obligation et bien autres intentions que le locuteur s'efforce d'imposer à son partenaire de l'acte de communication. La modalité d'obligation se veut une forme de violence qui se manifeste clairement au moyen de procédés linguistiques traduisant, dans des contextes de violence implicite ou explicite, la crise discursive qui se noue entre les interlocuteurs.

Pour bien maîtriser le fonctionnement de la modalité d'obligation, notre démarche sera la suivante. Nous commencerons tout d'abord par présenter les fondements théoriques sur lesquels nous définissons notre objet d'étude. Ensuite, nous analyserons les corpus sur lesquels nous avons travaillé. Nous montrerons que le recours à la modalité d'obligation ne se fait pas de manière hasardeuse. Nous y recourons à dessein et à des intentions bien déterminées. Nous montrerons enfin que le positionnement énonciatif du locuteur joue un rôle crucial dans la crise discursive qui s'installe entre les interlocuteurs. Dans ce qui suit, nous nous intéresserons à la notion de modalité qui est fréquemment utilisée par les grammairiens et les linguistes.

2. La modalité : état des lieux

En linguistique, la modalité se définit comme un domaine sémantique qui englobe un ensemble de valeurs à savoir l'éventuel, le probable, le possible, le nécessaire, le jussif, etc. Ces valeurs expriment l'opinion, l'attitude ou le jugement de l'énonciateur par rapport au contenu propositionnel de l'énoncé. Par ailleurs, la modalité est étudiée par plusieurs disciplines. Nous citons, entre autres, la logique, la philosophie, la grammaire, la sémantique, la pragmatique, la linguistique, etc. (Meunier, 1974, p. 8) explique dans le même sens "le terme [Modalité] est saturé d'interprétations qui ressortissent explicitement ou non, selon les linguistiques qui l'utilisent, de la logique, de la sémantique, de la psychologie, de la syntaxe, de la pragmatique ou de la théorie de l'énonciation." En linguistique, la modalité est définie comme la manière dont le locuteur évalue la potentialité des choses. Elle exprime l'attitude de ce dernier par rapport au contenu propositionnel de son énoncé. Elle modifie un fait énoncé au moyen d'une proposition en présentant ce fait comme nécessaire, possible ou vrai. Il s'ensuit que la modalité a trait à la subjectivité du locuteur, à son positionnement énonciatif et à ses stratégies discursives. Elle est donc parmi les moyens linguistiques dont se sert le locuteur pour s'exprimer, communiquer sa pensée, influencer un tel. Ceci dit, la modalité est au service du locuteur tant elle lui permet d'afficher sa présence et de marquer son attitude dans son discours.

Brunot (1974) présente la modalité comme:

Une action énoncée, renfermée, soit dans une question, soit dans une énonciation positive ou négative, se présente à notre jugement, à notre sentiment, à notre volonté, avec des caractères extrêmement divers. Elle est considérée comme certaine, ou comme possible, on la désire, ou on la redoute, on l'ordonne ou la déconseille, etc. ce sont là les modalités de l'idée. (Brunot, 1974, p. 507)

Bally (1965) s'intéresse à la dimension modale des énoncés. Le linguiste considère la mimique, la gestuelle, les modes verbaux, les adverbes et les adjectifs comme marqueurs de modalisation. La modalité, dit-il, "est l'âme de la phrase ; de même que l'esprit" (Bally, 1965, p.28), selon Querler, *La Grammaire d'aujourd'hui*⁹⁶, fait la distinction entre les modalités logiques qui renvoient à ce qui est possible et nécessaire des modalités qui définissent le statut de la phrase. Celle-ci est définie "en tenant compte de l'attitude du sujet parlant à l'égard de son énoncé et du destinataire." Gezundhajt (2000, p. 40) explique: "la modalisation relève de la façon dont un énonciateur prend en charge le contenu propositionnel de l'énoncé."

Pour clore cette partie, la modalité est une notion cruciale qui sert à marquer la présence du locuteur et par conséquent lui permet d'afficher son attitude vis-à-vis de ce qu'il exprime. C'est l'acte par lequel se manifeste l'attitude du locuteur.

3. La modalité d'obligation

Dans ce volet nous essayerons d'étudier les outils linguistiques permettant d'exprimer la modalité d'obligation. Selon la stratégie discursive, le locuteur opère, dans son discours, un certain nombre de choix en vue d'agir sur son interlocuteur et lui imposer des directives. En effet, le recours à certains outils linguistiques confère aux énoncés une valeur illocutoire assimilable à "des actes de paroles" explicites ou implicites. Charaudeau (1995, pp. 141-178) trouve important d' "ancrer les phénomènes de modalisation dans les dimensions énonciatives et pragmatiques des énoncés." Le linguiste subdivise l'acte d'obligation en obligation allocutive et obligation délocutive.

3.1 L'obligation allocutive

Quand il recourt à l'acte d'obligation allocutive, l'attention du locuteur sera orientée vers l'*allocutaire-cible*. Les outils linguistiques dont le locuteur se sert pour influencer l'attitude comportementale de l'allocutaire sont nombreux. Nous citons, entre autres, l'impératif jussif. Cet outil linguistique traduit la volonté du locuteur d'obtenir un changement dans le monde qui l'entoure. En effet, le locuteur peut effectuer un ordre direct en recourant d'une part à des verbes conjugués à l'impératif présent. "Sortez tout de suite" - "Ne touchez pas à la hache" - "Ne nous haïssons pas" - Le locuteur peut de même effectuer un ordre d'une manière indirecte en employant le subjonctif précédé par le morphème modalisant "*que*": "Il faut que vous partiez tôt"; "Il a peur que vous ne reveniez pas." Le locuteur peut, d'autre part, recourir à des structures

⁹⁶ Nicole Le Querler, *Les modalités en français*, *Revue belge de Philologie et d'Histoire*. Année 2004 : 82-3 pp. 643-656.

binaires formées par la conjonction “si”: “Si vous voulez réussir, vous n’avez qu’à travailler davantage.”⁹⁷

3.2 L’obligation délocutive

Dans ce type d’obligation l’attitude énonciative de l’être *discursif* sera masquée. Un tel positionnement énonciatif est rendu compte par des tournures où l’identité de celui qui parle est voilée. Un grand nombre d’outils linguistiques contribuent à cacher l’identité de la personne qui énonce le discours tels que *l’infinitif*. “Fuir est un acte de lâcheté”; l’utilisation des *déictiques pronominaux* qui ne renvoient pas directement au locuteur; mais à une instance collective. Parmi les déictiques pronominaux les plus employés nous citons le pronom “on”. “On doit arrêter ce massacre”; “On devrait agir pour le bonheur de tous”; les constructions à verbe impersonnel où l’identité du locuteur s’efface. “Il suffit d’un petit geste pour montrer que vous êtes solidaires.”; “Il convient de contester cette affirmation.”

Par ailleurs, l’obligation peut être exprimé par des verbes dont le sens, selon le contexte, dénote une obligation à savoir: *obliger, assujettir, imposer, devoir, pouvoir, revendiquer, réclamer*, etc.; des adverbes d’obligation tels que: *obligatoirement, inéluctablement, inévitablement, certainement, nécessairement*, etc.; des adjectifs ayant une valeur modalisante comme: *obligatoire, nécessaire, indispensable, impératif*, etc. Ajoutons qu’à ce qui précède, l’acte d’obligation peut être exprimé à travers des énoncés modaux déontiques et des énoncés modaux injonctifs. Etant donné que la modalité déontique et injonctive font partie de la modalité d’obligation, objet de ce travail, nous les étudierons tour à tour.

3.2.1 La modalité déontique

Le mot déontique vient du grec “*ta déonta*” qui signifie “ce qu’il faut.” Dans ce sens, la modalité déontique renvoie au domaine du vouloir du locuteur dans la mesure où celui-ci essaie d’imposer son autorité à son interlocuteur. Il s’ensuit que cette modalité exprime la volonté du locuteur d’agir sur celui qui reçoit le message, lui intimant un certain nombre d’agissements, l’invitant à se comporter comme il le désire. En fait, le locuteur se comporte ainsi parce qu’il détient un certain statut voire une certaine autorité. Seuls ceux qui possèdent de telles caractéristiques peuvent accéder à ce type de modalité. L’origine de l’obligation découle soit d’un pouvoir hiérarchique (ou une force supérieure) soit d’une autorité qui est reconnue comme telle dans l’acte d’énonciation. Faire appel à la modalité déontique, c’est s’intéresser aux jeux de pouvoirs qui nouent dans le discours entre le dominant et le dominé.

Par le biais de cette modalité, le locuteur cherche à imposer une certaine autorité à son interlocuteur afin d’agir de telle ou telle façon. Celui-ci se trouve dans l’obligation de suivre sans le vouloir le projet intentionnel du locuteur. D’un autre côté, la modalité déontique n’exprime pas seulement l’obligation. Elle implique aussi l’interdiction, la permission et le

⁹⁷ Les exemples cités dans ce passage — tels que “*Sortez tout de suite*,” “*Ne touchez pas à la hache*” ou “*Si vous voulez réussir, vous n’avez qu’à travailler davantage*” — illustrent concrètement les différents procédés linguistiques permettant au locuteur d’exprimer une obligation ou d’exercer une influence sur le comportement de l’allocutaire. Certains de ces exemples, empruntés à des sources diverses disponibles sur Internet, servent à montrer la variété des formes que peut prendre l’acte d’obligation allocutive dans la langue française. D’autres, en revanche, ont été inventés par l’auteur afin d’adapter ou de nuancer la démonstration, en la rendant plus claire et plus conforme au cadre analytique retenu. Ces exemples remplissent ainsi une fonction didactique : ils rendent visibles les distinctions entre ordre direct, ordre indirect et modalisation conditionnelle.

facultatif. En effet, selon la situation d'énonciation, le locuteur présente l'action qu'il émet dans le sens de l'obligation, de l'interdiction ou de la permission.

Le Querler (1996, p. 55)⁹⁸ note dans ce contexte "la modalité déontique est la modalité de l'ordre, de la permission, de l'obligation. Elle renferme donc un ensemble de concepts tels que l'obligation, l'interdit et le permis." Il en résulte que la modalité déontique renvoie au degré de subjectivité dont dispose la source déontique. Dans ce sens, Kronning (2001, p. 37) souligne que la modalité déontique est une "modalité du FAIRE qui correspond *grosso modo* à ce qu'on l'appelle, surtout en linguistique, anglo-saxonne, modalité radicale." La question qui se pose alors est de savoir d'où proviennent les impératifs proférés par les locuteurs. Peut-on, à partir d'une situation d'énonciation donnée, déterminer l'interlocuteur auquel un énoncé modal déontique est adressé ? Plus encore, quels motifs poussent l'interlocuteur à obéir aux directives de son interlocuteur ? Beaucoup d'autres questions restent en suspens et auxquelles nous essaierons de répondre dans la partie pratique.

3.2.2 La modalité injonctive

La modalité injonctive a pour fonction de demander à quelqu'un de faire quelque chose et cette demande peut, selon le contexte d'emploi, aller du commandement à la prière en passant par le conseil.

Queffelec (2006, p. 217) explique que:

La modalité injonctive s'applique à des énoncés qui accomplissent un acte illocutoire particulier, l'acte d'injonction. Le locuteur énonciateur JE essaie, en énonçant un énoncé injonctif d'imposer un comportement, un FAIRE précis à l'allocutaire destinataire TU et d'exercer aussi une contrainte sur lui.

On en déduit que le recours à la modalité injonctive permet au locuteur d'agir fortement sur son interlocuteur. L'autorité dont dispose le locuteur est rendue manifeste à travers l'emploi de l'impératif (jussif) à valeur injonctive. Riegel et al. (2009, p. 665) soulignent que selon la situation, la phrase injonctive peut avoir diverses nuances: "ordre strict, conseil souhait, demande polie, la défense...." Parmi les verbes qui expriment l'acte injonctif, nous citons : *ordonner, commander, demander, requérir, prier, solliciter, supplier, conseiller inviter*, etc. Searle (1974, p. 356), quant-à-lui, affirme "Par nature, l'acte injonctif accompagne l'intention d'agir sur autrui pour obtenir l'accomplissement de l'action future exprimée dans le contenu propositionnel. Le locuteur doit alors fournir à l'allocutaire une raison pour réaliser l'action en produisant l'énoncé."

A ce titre, l'acte injonctif côtoie la prescription, le commandement ou la recommandation en ce qu'ils semblent tous se rapporter à des actions où le locuteur vise à influencer sur les agissements de celui à qui ils sont adressées. Rappelons à cet égard qu'Austin (1970) assimile les actes injonctifs à des actes de parole ou à des énoncés performatifs où le locuteur ordonne fortement son interlocuteur de faire quelque. L'injonction est en effet un type d'énoncé qui n'est pas susceptible d'être vrai ou faux. Ainsi, comme le souligne Austin (1970, p. 5), "Je t'ordonne de fermer la porte" serait un énoncé performatif typique. Il satisfait tous les critères. Il est l'accomplissement de l'acte consistant à t'ordonner de fermer la porte, et il n'est ni vrai ni faux. Plus encore, cet énoncé ne décrit la chose à faire ni ne dit rien sur le monde. Il ordonne de faire quelque chose et ôte à l'interlocuteur toute possibilité de ne pas accomplir cet acte. Par ailleurs, Austin distingue entre deux actes de parole. D'abord, l'acte de parole explicite où le

⁹⁸ Le Querler, N. (1996). *Typologie des modalités*. Presse Universitaire de Caen.

locuteur ordonne directement son interlocuteur de faire quelque chose. En ce sens, un énoncé comme “Je t’ordonne de fermer la porte” ou “Ferme la porte” explicite l’action produite au moyen du verbe “ordonner” et au moyen du verbe “fermer” conjugué à l’impératif. Ensuite, l’acte de parole implicite se fait sans pour autant employer un marqueur linguiste. Un énoncé comme “Il fait chaud ici” peut aussi, si le contexte s’y prête, exprimer l’ordre. Il peut vouloir dire “Ouvrez la porte.”

Pour conclure, les outils linguistiques que nous avons passés en revue jouent un rôle très important dans la description de la modalité d’obligation. Ils sont susceptibles de rendre compte de la crise discursive qui se noue entre le locuteur et son interlocuteur. Ils auront donc leur place dans notre analyse de la modalité d’obligation. En fait, nous considérons cette modalité comme une forme d’action décrivant les moments de crise et de tension qui se produisent entre les interlocuteurs. Ladite modalité a donc un impact décisif sur la façon d’agir et de se comporter de celui auquel le locuteur s’adresse. Le discours de l’interlocuteur se cristallise et se fige tant que le locuteur impose sa loi et domine la situation.

4. La modalité d’obligation : valeur pragmatique

L’objectif de cet article, nous le rappelons, est d’étudier les différentes crises discursives qui s’installent entre les partenaires de l’acte de communication. En effet, la modalité d’obligation fonctionne comme un indicateur de force où le locuteur cherche à agir sur son interlocuteur et l’obliger à accomplir une demande, un ordre, un commandement, etc. Il est important de souligner que le positionnement énonciatif du locuteur joue un rôle crucial dans l’accomplissement de l’acte injonctif que le locuteur veut imposer à son interlocuteur.

Pour mener à bien l’étude pragmatique de la modalité d’obligation, nous nous appuyerons sur trois corpus révélateurs de la crise discursive en question. Le premier mini-corpus est de Boris Vian. Il est extrait de *Lettre ouverte à M. Paul Faber, conseiller municipal*, 1955. Le deuxième mini-corpus est extrait de *Le Rouge et le Noir* de Stendhal. Le troisième comporte une citation de Saint-Exupéry, extraite de *Terre des hommes* (1983).

4.1 La modalité d’obligation: positionnement énonciatif du locuteur

L’énonciation pense le langage en situation, avec ses participants. Elle accorde une grande importance aux intentions du locuteur (telles qu’elles se déploient à partir de ses dires, des modalités, et actes de langage) et aux effets que celui-ci entend produire sur son interlocuteur. Plusieurs procédés linguistiques dont le locuteur se sert pour marquer sa présence sont puisés dans la situation d’énonciation. Parmi ces procédés, nous citons *les actes de langage* et les *sous-entendus*. La modalité d’obligation a attiré aux actes de langage car elle se fait sur des énoncés qui accomplissent un acte illocutoire particulier à savoir l’acte d’obligation. En effet, tout locuteur qui emploie ce type de modalité à son compte, s’efforce d’imposer à son interlocuteur un comportement, une obligation, ou, du moins, d’exprimer le désir de se libérer d’une situation qui l’accable et l’étouffe.

Orecchioni (1995) parle de *praxématique énonciative*. Cette appellation sous-entend la dimension performative de l’énoncé. En fait, pour qu’un énoncé soit performatif, il doit répondre aux critères pragmatiques suivants : d’abord en l’énonçant, le locuteur décrit une action qu’il est en train d’exécuter. Ensuite, en émettant cet énoncé, le locuteur exécute l’action décrite. En fin, en l’introduisant dans l’énonciation, le locuteur vise sa mise en place dans le discours et l’accomplissement de l’action en cours.

4.1.1 La modalité d'obligation : une manière d'exprimer l'autorité morale du locuteur

Mini-corpus 1. Boris Vian, auteur de la chanson, *Le Déserteur*, écrit à Paul Faber, conseiller municipal qui a réagit durement contre la chanson, au nom de l'honneur des anciens combattants. Le discours de Vian révèle un discours en crise où l'auteur essaie d'agir sur son interlocuteur.

De deux choses l'une : ancien combattant, vous battiez-vous pour la paix ou pour le plaisir ? Si vous vous battiez pour la paix, ce j'ose espérer, ne tombez pas sur quelqu'un qui est au même bord que, et répondez à la question suivante : si l'on n'attaque pas la guerre pendant la paix, quand aura-t-on le temps de l'attaquer ? Ou alors, vous aimiez la guerre et vous vous battiez pour le plaisir ? C'est une supposition que je ne me permettrai pas même de le dire ; car je ne suis pas du type agressif.⁹⁹

Dans cet extrait, Boris Vian ne cherche pas à instruire son interlocuteur. Il critique sa façon d'agir et de se comporter. En effet, Vian refuse de faire la guerre vue les conséquences horribles qu'elle provoque. L'écrivain le dit clairement dans son poème "Le Déserteur": "Je ne suis pas sur terre pour tuer les pauvres gens." Par contre, Paul Faber semble n'être pas d'accord avec la position de Vian et agit durement contre lui au nom de l'honneur des anciens combattants. En réalité, il s'agit ici de deux points de vue totalement différents concernant le patriotisme. Pour Vian, ne pas faire la guerre n'est pas un signe de lâcheté. Au contraire, c'est un signe de courage et de responsabilité raison pour laquelle il appelle les gens à désertir et à ne pas faire la guerre. Paul Faber prend une autre position. Pour lui, la guerre est un devoir voire une obligation.

L'obligation dont il est question ici est associée à une entité représentant une position morale très élevée. Vian est reconnue comme une source morale et intellectuelle. Son discours vise à disqualifier la position de Paul Faber et la discréditer complètement. Pour ce faire, l'auteur recourt à plusieurs outils linguistiques dont le but est de réfuter catégoriquement le point de vue de son adversaire. Le choix des expressions modales utilisées dépend en partie de l'autorité que Vian souhaite "mettre en avant." D'emblée, Vian passe à l'attaque. L'expression ironique "anciens combattant" va dans ce sens. En effet, l'intonation avec laquelle l'expression est prononcée traduit le ton moqueur adopté par l'auteur. Par ailleurs, l'auteur recourt à une série de fausses questions dans le but est de montrer à son interlocuteur que la position qu'il prend est faible car elle n'a pas d'arguments solides. Tout le discours de Vian semble correspondre à des actions visant à influencer sur les agissements de son interlocuteur. La première fausse question "Vous battiez-vous pour la paix ou pour le plaisir?" agit fort sur l'interlocuteur car Vian ne lui laisse aucune chance d'échapper à une réponse de type: "Je me bats pour le plaisir." Autrement dit, il est difficile que Paul Faber avance une réponse de type: "Je me bats pour la paix." La fausse question est donc une accusation indirecte adressée à Paul Faber. D'ailleurs, l'emploi de cette expression "Ce que j'ose espérer" souligne que Vian doute que son adversaire se batte pour la paix. Le discours de Vian est donc assimilable à un acte de parole indirect "speech acts" où il ordonne Faber de ne pas se battre pour le plaisir. Dans ce sens, l'ordre devient un commandement ou une recommandation car tuer les pauvres gens ne peut en cas être un plaisir. Cette action constitue un crime, une humiliation, un déshonneur pour le genre humain. La guerre est un acte bestial faisant parler l'animal en l'homme. L'acte de parole qui découle de la fausse question que sera quelque chose comme: "Ne battez-vous pas pour le

⁹⁹ Vian, B. (1955). *Lettre ouverte à M. Paul Faber, conseiller municipal*. Editions de la mauvaise graine.

plaisir.” Ainsi, l’intention de communication du locuteur devient claire. Vian produit un ordre, une intimation voire un avertissement. La réussite de cet acte de parole dépend, sur le plan illocutoire, du statut qu’occupe le locuteur. En d’autres termes, le positionnement énonciatif du locuteur lui permet-il de proférer des ordres? Rappelons dans ce contexte qu’on n’a souvent pas le choix d’obéir un ordre. Cependant, la position intellectuelle dont dispose Vian pèse fort sur l’interlocuteur.

Autrement dit, le positionnement énonciatif détermine le comportement et les actions de l’interlocuteur et l’invite à faire la chose demandée. Dès lors, le propre de l’ordre est d’avoir pour effet des modifications dans l’attitude comportementale de l’interlocuteur. Celui-ci devient obligé de faire ce qui est demandé par l’ordre. C’est dans ce sens qu’on peut parler d’un discours en crise. La confrontation des deux points de vue fait valoir le point de vue de Vian. En fait, on dirait qu’on assiste à un procès-verbal où le juge pèse le pour et le contre pour valider lequel des deux points de vue est le plus convaincant. C’est donc une confrontation entre un témoin averti (Vian) et un accusé (Faber) dans un procès.

La deuxième fausse question aura la même interprétation. Le locuteur poursuit son raisonnement argumentatif pour montrer à son interlocuteur l’absurdité de la guerre et que cette barbarie ne sert à rien car le seul combat qu’on doit mener est celui de la paix. Par le biais de cette fausse question, “Si l’on n’attaque pas la guerre pendant la paix, quand aura-t-on le temps de l’attaquer ?” Vian valorise la paix et rejette la guerre. Le sous-entendu qu’on peut tirer de cette question est: “On doit attaquer la guerre pendant la paix.” Une autre fois se clarifie la vision humaniste de l’auteur. En effet, son poème *Le déserteur* met en avant un engagement pacifiste et antimilitariste rejetant toutes les formes de violence. C’est pour cette raison que le poème devient un hymne à la paix, à la concordance et à au pacifisme. L’acte illocutoire qu’on peut tirer de cette fausse question est le suivant: “Attaquons la guerre pendant la paix.” Le but illocutoire qui se dégage de la modalité impérative “Attaquons ” est d’amener l’interlocuteur à agir en faveur de la paix et non en faveur de la guerre. L’ordre devient obligation car on ne peut pas tolérer la guerre. Voyons que Vian adopte une stratégie discursive qui ne laisse aucun choix à l’interlocuteur de s’y opposer. Ainsi, le discours de l’interlocuteur se cristallise et se fige tant il est dominé par le discours du locuteur. C’est précisément le positionnement énonciatif et les tactiques discursives du locuteur qui interviennent pour faire réussir l’acte illocutoire. Searle (1979, p. 66) dit à ce propos:

Les ordres et les commandements ont comme règle additionnelle que *L* doit être dans une position d’autorité par rapport à *I* [...] Par ailleurs, dans les deux cas, la relation d’autorité infecte les conditions essentielles car l’énoncé vaut comme une tentative de conduire *I* à faire *A* en vertu de l’autorité que *L* a sur *I*.

Dans le mini-corpus suivant, le père Sorel recommande à son fils (Julien Sorel) de surveiller la scie et de vérifier régulièrement l’état de la lame et les composantes de la machine. Julien, au lieu de faire son travail, s’occupe de la lecture d’un livre.

4.1.2 La modalité d’obligation : légitimer une position hiérarchique

Mini-corpus 2. Ce fut en vain qu’il (le vieux Sorel) appela Julien deux ou trois fois.

Eh bien, paresseux ! Tu liras donc toujours tes maudits livres, pendant que tu es de garde à la scie ? Lis-les le soir, quand tu vas perdre ton temps chez le curé, à la bonne heure [...] Descends, animal, que je te parle. *Le Rouge et le noir* de Stendhal

Il importe de dire que tout énoncé est porteur de plusieurs intentions, en particulier, celle de *faire* ou de *faire faire* quelque chose. En prenant appui sur ce mini-corpus, nous dirons que l'obligation (ou le commandement) suppose une certaine autorité chez celui qui l'énonce. Il convient donc de repérer la source de l'obligation. La visée communicationnelle du locuteur consiste à mettre le sujet visé dans une position de crise, de soumission et d'indépendance. Le pouvoir dont il dispose s'exerce en lien avec l'affirmation de soi, de l'éthos (ou traces de subjectivité qui servent de preuve au discours, basées sur la personne du locuteur). En effet, nous constatons que le père Sorel recourt à une tactique et à une stratégie qui laissent entendre qu'il s'agit d'un sujet dominant la situation d'énonciation. Cette domination a pour source le positionnement qui lui permet de proférer des ordres. Il est reconnu dans la situation d'énonciation comme source de crise et d'autorité familiale et sociale (il est un bourgeois). De fait, le statut du locuteur renforce pour ainsi dire la crise qu'il cherche à imposer à son interlocuteur. Dès lors, de la situation d'énonciation découle un rapport de dominant/ dominé. Le père domine la situation car il a une mainmise sur son enfant alors que l'enfant se trouve dans une position de dominé exécutant, sans le vouloir, les ordres de son père. En d'autres mots, les propos du père Sorel prennent la forme d'une obligation qui ne laisse aucune possibilité à Julien d'agir. Les tactiques de positionnement énonciatif sont linguistiques, portant sur les comportements discursifs par lesquels le père Sorel exprime sa position et son positionnement par rapport à son fils, démuné de tout positionnement énonciatif. L'autorité imposée par le père est rendue manifeste par le biais de procédés intralinguistiques énonciatifs. Ces procédés modalisent le discours du père et l'autorisent à forcer la crise. Parmi les procédés intralinguistiques qui s'offrent au locuteur pour imposer une crise discursive à son interlocuteur et lui permettent d'imposer sa force et de dicter son pouvoir, nous citons:

- **Le vocabulaire dépréciatif**, Des mots et des expressions comme "paresseux", "maudits livres", "perdre ton temps", "animal" s'emploient pour agir sur l'interlocuteur et le remplir de peur. L'emploi d'un tel vocabulaire atteste de la position et du statut social dont jouit le père.
- **L'impératif, exprimant l'ordre**, "Lis-les les soirs" et "Descends animal...", ces impératif, ayant pour valeur la recommandation accentuée au degré le plus haut la brutalité du père et exige l'obéissance de l'enfant.
- **L'emploi métaphorique de "maudits livres"** souligne à quel point le père Sorel déteste, contrairement à Julien, les livres.

Les procédés extralinguistiques (ou le non verbal) se manifestent clairement dans cet extrait et acquièrent une fonction pragmatique. En effet, le ton menaçant du père, sa voix, ses gestes sont autant de moyens lui permettant d'exprimer sa colère et son indignation. Le père s'indigne contre son enfant qui, au lieu de surveiller la scie, lit un livre. Dès lors, l'expression "Descends animal " se prononcerait sur un ton fort et s'accompagnerait d'un geste dévoilant l'agressivité et la violence du père. Par ailleurs, la voix grave et aigue du père aurait un impact décisif sur la psychologie du jeune Sorel. Pour agir très fort sur son fils, le père Sorel module sa voix dans un ordre déterminant afin de le brusquer. C'est une façon d'agir pour faire passer son message. A notre sens, l'emploi de l'expression "tu liras donc tes maudits livres " devrait se prononcer sur un ton ironique visant à déstabiliser et à décevoir l'enfant. Ainsi, tout dans la situation d'énonciation, le positionnement énonciatif du père, ses stratégies discursives, sa communication non verbale, reflète l'intention de ce dernier de dominer son enfant et de lui enlever toute initiative de se remettre. Les mots blessants qu'il emploie véhiculent sa pensée et clarifient le conflit qui s'installe entre le père et son enfant. En ce sens, les mots révèlent une particulière importance à certains moments notamment dans des situations de conflits. Ils ont le pouvoir de détruire psychologiquement et se transforment en actes de langage très expressifs.

Les impératifs analysés plus haut équivaldraient à:

Je t'interdis de lire pendant le travail.
Je vous ordonne de descendre.

D'ailleurs le "tu" prononcé sur un ton fort en période de conflit est mauvais signe au sens où le locuteur cherche à blesser son interlocuteur et le réduire en silence. Remarquons, par ailleurs, que les impératifs "lis" et "descends" ont un sens prospectif car la réalisation de leurs actions est "imminente." Il en ressort que le statut familial et social du père Sorel, sa position hiérarchique supérieure, le ton brutal et menaçant, la gestuelle, le recours à l'impératif jussif sont autant de procédés qu'emploie le père pour imposer sa domination sur Julien et créer une situation de crise.

Nous y ajoutons que l'ordre imposé par le locuteur peut être exprimé d'une manière implicite. Dans ce cas, le locuteur cherche à atténuer et modérer son discours. Les exemples ci-dessous montrent que le locuteur atténue la force illocutoire de son discours. Par ailleurs, le décodage du message, fait par le récepteur, est d'ordre situationnel et dépend des connaissances linguistiques acquises par ce dernier. Nous expliciterons la valeur énonciative implicite de l'acte illocutoire dans le mini-corpus suivant.

4.1.3 L'obligation est Manière D'exprimer L'engagement du Locuteur

Mini-corpus 3.

Pourquoi nous haïr ? Nous sommes solidaires emportés sur la même planète, équipage d'un même navire. Saint-Exupéry, *Terre des hommes* (1938).

Saint-Exupéry se veut un écrivain engagé. Il recourt à la question oratoire "Pourquoi nous haïr ?" pour impliquer ses interlocuteurs et donc agir sur eux. En réalité, l'auteur cherche à intimider les humains et à les pousser à prendre conscience de l'importance du sentiment d'amour. Dès lors, la structure profonde de cette question oratoire s'assimile à un acte illocutoire implicite où le locuteur cherche à imposer une crise discursive chez ses interlocuteurs. En effet, l'intention de l'auteur n'a pas seulement pour visée d'informer les hommes de la cruauté d'un monde sans amour et sans paix mais aussi de les avertir des conséquences fâcheuses de vivre dans un monde dépouillé de tendresse et d'affection. Si c'est le cas, l'acte d'obligation qui résulte de cette fausse question serait:

- Ne nous haïssons pas.
- Stoppez la haine.
- Aimons-nous.

A ce propos, Austin (1970, p. 52) souligne "dire quelque chose provoque le plus souvent certains effets sur les sentiments, les pensées ; on peut parler en effet, dans le but de provoquer ou de susciter de tels effets." Ainsi, l'intention communicative de l'auteur se clarifie davantage. En effet, le recours à l'impératif injonctif "ne nous haïssons pas" accompagné de la négation "ne... pas" rend clair le déroulement de l'énonciation car l'impératif s'emploie ici comme *marqueur discursif*, exprimant l'ordre. Comme le soulignent Damourette et Pinchon (1968-1987, p. 75), l'impératif constitue un "factif verbal à caractère locutoire" par lequel "le locuteur extériorise un état psychologique qui influence l'allocutaire" et "tend, par sa volonté, à modifier le monde." Dans ce cadre, l'auteur cherche à *réunir les hommes* et à les inciter à vivre ensemble dans un climat de *paix et de sérénité*, plutôt que dans un contexte de conflit et

de frustration. Il les *exhorte à s'aimer et à être solidaires*, en espérant que ces derniers répondront favorablement à son appel, lui qui est reconnu comme *autorité intellectuelle*. Par ailleurs, c'est grâce à son *positionnement énonciatif* que Saint-Exupéry parvient à légitimer son discours et à exiger une réponse urgente à son appel pacifique.

5. Conclusion

Pour conclure, nous avons essayé de passer en revue différentes questions ayant trait à la modalité d'obligation dans son rapport avec la crise du discours. En effet, les mots ont la force de changer la réalité des choses. Ils peuvent être considérés comme des marqueurs de rapport de force et des instruments essentiels d'un pouvoir en action. Les locuteurs y recourent pour imposer leur autorité. Dès lors, la modalité d'obligation est susceptible d'exercer un certain pouvoir et d'imposer des directifs. Comme nous l'avons remarqué, le statut et l'engagement du locuteur jouent un rôle prépondérant dans l'exécution de l'ordre. La position hiérarchique, l'emplacement énonciatif, les tactiques discursives sont autant de moyens auxquels le locuteur recourt pour mener le jeu et créer une certaine crise discursive chez son interlocuteur. Il s'ensuit que la modalité d'obligation pose le locuteur en position de force vis-à-vis de son interlocuteur. Cette forme de modalité offre au locuteur la possibilité de construire une image de soi, de se comporter comme une autorité reconnue et de revendiquer le monopole d'un pouvoir légitime. La crise discursive que le locuteur cherche à imposer à son interlocuteur émane des différentes façons d'exprimer la modalité d'obligation que nous avons évoquées tout au long de ce travail. Il s'agit en fait de choix stratégiques bien choisis de la part du locuteur pour parvenir à des fins pragmatiques, illocutoires et /ou perlocutoires bien déterminées. De fait, la modalité d'obligation renforce la position du locuteur et lui facilite l'exécution de l'ordre en vue de parvenir à un résultat.

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