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**Veritas* is Latin for truth, reality.

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EDITORIAL: 2025 JOHN POTTER LITERACY AWARDS

Dr David Le Cornu*

President - St Clements Education Group

(DBA, DIPFM, MBA, FAICD)

2025 has again produced some excellent articles from our growing list of Authors. The best of the nominated articles and recipients chosen for the **John Potter Literacy Award for 2025** are mentioned below.

The **winner** of the John Potter Literacy Award for 2025 is Dr Mark Dee for his article **“Education as Self-Determination of the Kawthoolei People”**.

The **runner-up** award goes to Yubaraj Kandel for his article **“Natural Resource Management in the Buddhist Era: Historical Practices and Contemporary Implementations”**.

A **highly commended mention** also goes to Dr Sharif Sheikh Amin for his article **“Federalism in Practice: Assessing Local Governance and Development Outcomes in Somalia’s Federal Member States”** and Dr Omar Juma Ali for his article **“Assess the Impact of Innovation Programs on Social and Economic Development in Tanzania: A Case of Zanzibar”**.

Other articles **nominated** for the John Potter Literacy Award included the following: **“How Policies and Procedures Safeguard Supply Chains from Corruption and Fraud”** by Dr Abraham Daniel Bosman Grobler and **“The Critical Roles of Police Officers Investigation Cybercrimes on Social Media Networks”** by Co-Authors Dr Eng Kimsan and Srieng Sophy.

Congratulations to all of the nominated authors. In the next coming days we will contact our well deserved recipients of the 2025 John Potter Literacy Award and forward printable e-copies of their award certificates.

If you wish to read any of these articles please email Dr David Le Cornu and copies can be sent to you electronically. Alternatively, **‘Veritas’** publications are available on our website and can be accessed via our e-library at www.stclements.edu/library.html.

Our **‘Veritas’** Academic E-journal will be released again on two more occasions during 2026, dates still to be set, so if you wish to have an article of interest published please send it to the editor Mr Adrian Williams at admin@stclements.edu to confirm suitability. The second edition of 2026 is already half fulfilled (estimate release around June 2026).



***Dr David Le Cornu**

President - St Clements Education Group

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ASSESSING THE EFFECTIVENESS OF THE RESEARCH ECOSYSTEM AND FUNDING MECHANISMS IN ZANZIBAR'S PUBLIC SECTOR

Dr Omar Juma Ali*

(Doctor of Philosophy, St Clements University Turks & Caicos Islands - British West Indies)

This is a summary from the paper written for the recently awarded St Clements University Doctor of Philosophy (Ph.D) degree and published as part of the St Clements University Professorial Diplomate Program.

The complete version of this summarised article is available at:

<http://www.stclements.edu/Articles/Zanzibar.pdf>

Abstract

Research and Development (R&D) is central to shaping evidence-based policymaking and driving sustainable national development. In Zanzibar, the government has implemented several initiatives aimed at integrating research into public institutions. These include establishing research units within ministries, creating dedicated R&D institutions, and developing a research department under the Zanzibar Planning Commission. However, despite these efforts, the research ecosystem remains under-resourced and faces several systemic challenges. This study assessed the current state of the public sector research ecosystem in Zanzibar, focusing on funding mechanisms, research activities, institutional capacity, infrastructure, and operational challenges. Using an explanatory sequential mixed methods approach, data were collected from 62 institutions, including public ministries, universities, and private research bodies. The findings reveal that although there is a growing and experienced research workforce, the effectiveness of research activities is hampered by inadequate funding, limited access to modern infrastructure, insufficient technical capacity, weak coordination mechanisms, and low awareness of policy frameworks. Recommendations include establishing a centralized research coordination body, creating a national research fund, enhancing human resource capacity, and aligning research activities with national development goals. These measures are crucial for enabling Zanzibar's research ecosystem to effectively support the Zanzibar Development Vision 2050 and the United Nations Sustainable Development Goals (SDGs).

Keywords: *Research ecosystem, Zanzibar, public sector, research funding, research capacity, policy-making, R&D, coordination, SDGs, Development Vision 2050*

Introduction

Government ministries play a critical role in national development through the generation and use of research evidence to inform policymaking and program implementation. In Zanzibar, various strategic efforts have been made to integrate research into the public sector. These include the creation of dedicated research units within ministries, the establishment of specialized research institutions, and the introduction of a research department within the Zanzibar Planning Commission. This department has the responsibility to coordinate, develop, and monitor national research agendas. These initiatives are designed to support evidence-informed decision-making across key sectors such as health, education, infrastructure, economic growth, and environmental sustainability. Despite these advances, ministries still face significant obstacles that limit the effectiveness of research activities. These include insufficient funding, outdated technologies, poor collaboration among institutions, and a shortage of skilled researchers. This study was undertaken to assess the current state of the research ecosystem in Zanzibar and to generate evidence-based recommendations that can inform future strategies for improving research capacity and aligning research outputs with national priorities.

Rationale and Justification

The importance of R&D in shaping effective public policy and promoting sustainable development is widely acknowledged. In Zanzibar, this importance is underscored by the government's commitment to achieving the ambitious targets outlined in the Zanzibar Development Vision 2050. However, the potential of research to inform strategic development is frequently undermined by systemic limitations. These include underfunded research programs, inadequate human and technical capacity, and fragmented institutional coordination. As the global economy becomes increasingly knowledge-driven, the ability of governments to generate and apply research evidence is more vital than ever. In Zanzibar, strengthening the research ecosystem is essential to enable ministries to address complex socio-economic and environmental challenges. This study seeks to evaluate the effectiveness of existing research structures, funding mechanisms, and coordination efforts, with the ultimate goal of identifying the reforms needed to

ensure that research becomes a central driver of development policy and practice.

Objectives of the Study

The primary objective of this study was to evaluate the effectiveness of the public sector research ecosystem in Zanzibar, with a focus on how well it supports evidence generation for national development. Specific objectives included assessing the structure and functionality of the research ecosystem; analysing the alignment of research activities with national development goals; evaluating the availability, sustainability, and expenditure of research funding; and identifying institutional and technical challenges including staffing, capacity building, infrastructure, and coordination that hinder research effectiveness and innovation.

Methodology

This assessment adopted an explanatory sequential mixed methods design, beginning with the collection and analysis of quantitative data, followed by qualitative data to explain and expand on the findings. Primary data were collected through structured questionnaires and semi-structured interviews with key stakeholders including policymakers, researchers, academic staff, and end-users such as farmers and fishers. Secondary data were obtained from reviews of national development frameworks, ministerial strategic plans, budgetary documents, salary structures for research personnel, and institutional reports. Purposive sampling was used to select institutions directly involved in research across Zanzibar. The total sample consisted of 62 organizations, including 48 public ministries, departments, and agencies (MDAs) and 14 universities and private institutions. Key respondents included staff from the Department of Policy Planning and Research, the Department of Budget within the President's Office of Finance and Planning, as well as private sector research collaborators. Consultations were also held with senior staff from 50 percent of higher learning institutions and R&D organizations. Case studies and benchmarking visits were conducted with institutions on the Tanzanian mainland and international organizations to identify best practices in research governance, funding, dissemination, and utilization. Kobo Collect software was used to aid data collection and analysis.

Key Findings

Research in Zanzibar is primarily driven by government agencies rather than ministries. Approximately 61.3 percent of research personnel are affiliated with agencies, whereas ministries comprise only 38.7 percent. This reveals a structural imbalance in research governance, where operational bodies lead implementation, and ministries lag behind in providing oversight and strategic direction.

The composition of research personnel shows a significant underrepresentation of core researchers. Only 9.7 percent of respondents are professional researchers. Instead, research functions are largely conducted by planning officers (37.1%), administrators (11.3%), M&E officers (11.3%), and research managers (12.9%). This signals a lack of technical research leadership, which may compromise the quality of research outputs.

The research workforce in Zanzibar is mature and experienced, with 71 percent of respondents having more than six years of research experience. Among them, 45.2 percent have over a decade of experience. However, this experienced workforce remains underutilized due to insufficient funding, inadequate infrastructure, and weak institutional support mechanisms.

A major barrier identified in the study is the critical shortage of research funding. Approximately 67.7 percent of respondents reported no access to either internal or external funding for research. This funding gap significantly hinders the initiation, continuity, and scaling of research projects and innovation.

Access to essential research infrastructure, including libraries, data repositories, and digital databases, was reported as poor or inadequate by over 60 percent of respondents. This severely limits the ability of researchers to conduct high-quality evidence-based studies and collaborate effectively.

Capacity building initiatives are also lacking. An overwhelming 87.1 percent of respondents had no access to training, mentorship, or professional development programs. This deficit in capacity building further weakens the ability of institutions to adapt to emerging research methodologies and standards.

There is limited awareness of research policies and ethical governance frameworks among personnel. About 62.9 percent of respondents were unaware of the regulations that guide research activities in Zanzibar, indicating that institutional efforts to disseminate and enforce governance structures remain insufficient.

Research outputs lack academic and policy impact. While community engagement and internal reporting were common (40.5%), only 4.1 percent of respondents published in peer-reviewed journals, and just 17.7 percent had developed policy briefs. This limits both the international visibility and domestic policy influence of research activities.

Technology and innovation research is notably underrepresented. Only 8.1 percent of research activities focused on science, technology, engineering, and innovation fields. The majority (56.5%) were focused on the social sciences. This imbalance suggests a need to realign research priorities with the country's modernization agenda.

Research coordination mechanisms were widely seen as ineffective. Nearly 70 percent of respondents expressed dissatisfaction with existing procedures, citing bureaucracy, poor communication, and unclear protocols as key challenges to effective inter-agency collaboration.

Compensation and incentive structures for researchers were found to be misaligned with their responsibilities. About 64.5 percent of respondents felt that their salaries and benefits were not commensurate with their roles, and only 12.9 percent considered their compensation competitive. This discourages talent retention and motivation.

Public engagement with research findings remains limited. While 67.1 percent of respondents indicated some awareness of research outputs, 32.9 percent remained uninformed. This signals the need for improved dissemination strategies using media, digital platforms, and public events.

There is strong stakeholder support for the establishment of a centralized research coordination body. About 77.4 percent of respondents favoured the creation of such an institution, to regulate, harmonize, and streamline research efforts across sectors and institutions.

Stakeholders identified six priority areas for reform: capacity building (24.2%), establishment of a national research fund (19.4%), strategic resource mobilization (17.7%), creation of a central coordinating body (14.5%), development of research data centers (12.9%), and the promotion of innovation and knowledge-sharing platforms (11.3%).

Conclusion

This study has revealed that while Zanzibar has made commendable efforts to establish a research ecosystem within its public sector through institutional reforms, strategic planning, and the establishment of dedicated research units significant structural and operational challenges persist. These include inadequate funding, limited technical capacity, insufficient infrastructure, weak coordination mechanisms, and a lack of awareness of research policies and ethics frameworks. Despite the presence of a mature and increasingly active research workforce, the full potential of research to inform policy and support national development remains underutilized. To transform research into a strategic tool for achieving Zanzibar's Development Vision 2050 and the Sustainable Development Goals (SDGs), there is an urgent need for a comprehensive overhaul of the research system. This must include the establishment of a centralized research coordination body, a dedicated national research fund, and sustained investments in human capital, infrastructure, and policy frameworks that promote innovation, collaboration, and evidence-based decision-making.

Recommendations

To address the identified challenges, ministries should be empowered to provide strong leadership in research governance. This includes developing formal mandates for research oversight and implementing structured accountability frameworks. Staff in these ministries should receive training in monitoring and coordination of research projects.

Institutions must expand their technical capacity by recruiting professional researchers and investing in staff development. Targeted training programs should be designed to build skills in research methodology, data analysis, and grant writing. Continuous professional development is needed for planning, administrative, and M&E personnel involved in research.

The government should prioritize investment in research infrastructure and sustainable funding. This includes allocating sufficient budgets for upgrading laboratories, libraries, ICT systems, and databases. A dedicated national research fund should be established with clear criteria to support innovative and impactful research.

Capacity building programs must be institutionalized. These should include mentorship schemes, international fellowships, short courses, and workshops. Partnerships with universities, NGOs, and international research bodies can support the delivery of high-quality training and capacity development.

Research outputs must be improved in both quality and accessibility. Institutions should encourage peer-reviewed publications and promote policy-relevant research. Platforms for sharing research findings with policymakers, practitioners, and the public should be developed, including online repositories and media outreach.

Coordination of research efforts must be streamlined through the establishment of a central agency. This body should be responsible for setting research priorities, monitoring progress, regulating standards, and facilitating partnerships. It should be supported by a multi-stakeholder board and clear legal mandates.

Improved compensation structures are essential for attracting and retaining talented researchers. Salary scales and benefits must be reviewed and adjusted to reflect the complexity and impact of research roles. Performance-based incentives and recognition systems can also boost morale and productivity.

A comprehensive national research policy should be developed. This should outline strategic priorities, ethical standards, coordination mechanisms, and implementation strategies. The policy should be widely disseminated and integrated into sectoral planning frameworks.

Public engagement in research must be enhanced. Media campaigns, community forums, and school outreach programs can help raise awareness of the value of research and build trust. Public feedback mechanisms can also ensure that research addresses real community needs.

Finally, the government and research institutions must actively pursue partnerships and donor engagement. Collaborative projects, co-financing arrangements, and innovation hubs can facilitate knowledge exchange, increase funding, and promote the integration of research into development programming.

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About the Author



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A SUMMARY ON CANADA, UNITED STATES AND MEXICO TARIFF AGREEMENT

Dr Bertram Barnswell*

(M.Ed, Ph.D, C.Chem)

The United States, Canada, and Mexico are part of a trade agreement called the **USMCA** (United States-Mexico-Canada Agreement), which replaced NAFTA in July 2020. This agreement was designed to promote free trade between the three countries by reducing or eliminating tariffs, among other provisions.

So why would the U.S. impose a new tariff on Canada despite the USMCA?

There are a few **key reasons** why this might happen:

1. National Security Exemptions (Section 232 Tariffs)

The U.S. has used **Section 232 of the Trade Expansion Act of 1962** to impose tariffs on imports (like steel and aluminum) for national security reasons. These tariffs have sometimes been applied even to allies like Canada.

➔**Example:** In 2018, the Trump administration imposed tariffs on Canadian steel and aluminum, citing national security — despite Canada being a close ally and part of NAFTA (the predecessor to USMCA).

2. Trade Disputes or Alleged Violations

If the U.S. believes Canada is violating part of the USMCA or engaging in **unfair trade practices**, it may impose tariffs as a retaliatory measure — even if the two countries are in a free trade agreement.

➔**Example:** The U.S. has imposed tariffs on Canadian **softwood lumber** for decades, arguing that Canada unfairly subsidizes its lumber industry. These disputes have persisted even under NAFTA and USMCA.

3. Temporary or Emergency Measures

In some cases, the U.S. may impose **temporary tariffs** in response to sudden surges in imports that are seen as harming domestic industries. These could be **safeguard measures**, which are sometimes allowed under WTO and USMCA rules under strict conditions.

4. Political or Strategic Pressure

Tariffs are sometimes used as a **negotiating tool** to extract concessions or changes in behavior — even when there's an agreement in place. While controversial, these tactics have been used in U.S. trade policy in recent years.

5. Not All Goods Are Tariff-Free

USMCA eliminates tariffs **only on qualifying goods**. If a product doesn't meet the **rules of origin** under USMCA (for example, not enough of it was made in North America), it might not be eligible for duty-free treatment.

Summary

Even with the USMCA in place, the U.S. can legally impose tariffs under specific exceptions like:

- National security (Section 232)
- Anti-dumping or countervailing duties (against unfair subsidies)
- Safeguard measures
- Trade disputes over rule violations

Why did the U.S. impose extra tariffs on cars built in Canada in 2025?

Despite the USMCA (also called CUSMA in Canada), **on April 3, 2025**, the Trump administration issued a 25% tariff on imported **automobiles and later certain auto parts** from Canada and Mexico, citing national security and trade imbalance concerns.

[The Economic Times+15](#)[BNN Bloomberg+15](#)[The Times of India+15](#)[Lethbridge Herald+8](#)[PwC+8](#)[The Economic Times+8](#)

USMCA (CUSMA) exemption with a twist:

- **Vehicles meeting USMCA rules** (75% North American parts) were allowed a limited carve-out: **only the non-U.S. content was taxed at 25%**, not the full value of the car. [Wikipedia](#)
- **Non-compliant vehicles**, however, faced the full 25% tariff on total value. [Wikipedia](#)

Importers were required to document U.S. content. If they overstated it, the tariff would apply retroactively to the full value of that model's imports until corrections were made.

[Automotive Dive+13](#)[PwC+13](#)[BNN Bloomberg+13](#)

This policy didn't mark a repeal of USMCA but introduced a **new enforcement mechanism under Section 232-style national security authority**.

How did Canada respond?

On **April 9, 2025**, Canada enacted matching retaliatory measures:

- **25% tariff on U.S.-made vehicles** that are not USMCA/CUSMA-compliant.
- For compliant vehicles, Canada imposed a 25% levy on the **non-Canadian and non-Mexican content** of those cars.
[PwC+9CNBC+9Reuters+9CityNews Vancouver+11canada.ca+11CNBC+11](#)

Canada’s approach intentionally excluded **auto parts** from retaliatory tariffs, to avoid disrupting integrated supply chains, and implemented a **remission framework** to offer relief to automakers that maintain Canadian investment and production.

[CNBC+2The Guardian+2](#)

The revenue collected—estimated at CA \$8 billion (US \$5.6 billion)—is earmarked to support displaced workers and affected industries.

[CNBCWall Street JournalCityNews Vancouver](#)

What about the 1965 Auto Pact vs. USMCA?

The **Auto Pact of 1965** was an earlier bilateral agreement between Canada and the U.S. that fostered automotive integration. USMCA/CUSMA, negotiated later and replacing NAFTA in 2020, built on that tradition by codifying rules on content and qualification for duty-free treatment.

The problem isn’t the trade agreements themselves—it’s that U.S. leadership invoked **national security or emergency trade powers**, allowing them to override or reinterpret USMCA protections and impose sector-specific tariffs.

Quick Summary Table

What	U.S. Action (Apr 2025)	Canadian Response
Vehicles	25% tariff on non-USMCA vehicles; or on non-U.S. content for compliant vehicles BNN Bloomberg	25% tariff on non-CUSMA vehicles; or on non-Canadian/Mexican content for compliant ones canada.caCNBC
Auto parts	Additional 25% tariffs planned for parts (may be phased) PwCWikipedia	No tariffs on parts; parts explicitly exempted to protect supply chains CNBCLethbridge Herald
Relief mechanisms	Accounting requirements; no drawback rights; compliance audit risk PwC	Remission/exemption framework for producers investing in Canadian operations Automotive DiveCNBC

Here’s a **model-by-model breakdown** of how automakers are adjusting production amid the 2025 U.S.–Canada tariffs:

Canadian-Built Models at Risk & Strategic Shifts

Based on a widely cited Reddit post, here’s a snapshot of vehicles assembled in Canada and their likely tariff exposure and production response.

[Financial Times+10Reddit+10Reddit+10:](#)

Stellantis (Canada)

- **Dodge Charger** (Brampton)
- **Chrysler Pacifica & Voyager** (Windsor)

Production is being reconsidered or split amid tariffs and retraining delays.

Ford (Canada)

- **Mustang GTD** (Markham, Ontario)
- **F-150 Super Duty** (transitioning: currently U.S.–built; moving to Canada by 2026)

Short-term exposure; Super Duty relocation may complicate compliance later.

General Motors (Canada)

- **Chevrolet Silverado and GMC Sierra** (Oshawa)
- **BrightDrop EV600 & EV410** (Ingersoll)

GM is accelerating U.S. content in engines/transmissions and evaluating plant shifts if tariffs persist. [Wikipedia+3Reddit+3Reddit+3Reddit+1](#)

Honda & Toyota (Canada)

- **Honda Civic Sedan** (Alliston)
- **Honda CR-V** (Alliston and Indiana)
- **Toyota RAV4 (non-hybrid)** (Woodstock)
- **Lexus RX & NX hybrids** (Cambridge)

These models may pivot sourcing toward U.S.-based parts or prioritize domestic sales to limit U.S. tariff exposure. [RedditReddit+1](#)

Notable Automaker Adjustments – Model Specifics

Honda & Acura

- Acura’s **MDX, RDX, TLX, Integra**, etc., assembled in Ohio or U.S. plants are less exposed to full tariffs. Those built in Mexico or relying on Canadian part content (like Integra) remain vulnerable.
[WIRED+7Reddit+7Reddit+7](#)

Hyundai

- Models like the **IONIQ 5, IONIQ 9, Santa Cruz, Santa Fe, Tucson** built in the U.S. (or Mexico redirected to Canada) have clearer paths for US-market viability. Notably, Hyundai shifted Mexican-made Tucsons to Canada and continues U.S. builds to shield from tariffs.
[Reddit](#)

Stellantis (Jeep Compass)

- The **Jeep Compass** will be built at the Brampton plant starting Q4 2025—with a \$1.32 B investment—to ensure future USMCA compliance and avoid duties.
[Wikipedia+4Wikipedia+4Wikipedia+4](#)

Infiniti

- **Infiniti QX50 and QX55**, currently assembled in Mexico, have been suspended for U.S. orders due to tariff exposure. Production continues for other markets but not U.S. destinations.
[Wikipedia](#)

Supply Chain Adjustments Summary

Brand / Model	2025 Canadian-built Model	Response / Shift
Dodge Charger, Pacifica	Built in Ontario	Production review; possible U.S. or Mexico shift
Ford Mustang GTD	Markham, ON	Exposure; potential sales reorientation or U.S. relocation
GM Silverado / BrightDrop EV	Oshawa / Ingersoll	Increasing U.S. engine/component content; exploring relocations
Honda Civic, CR-V	Alliston, ON	U.S. sourced parts prioritized for U.S. sales
Lexus RX / NX (hybrids)	Cambridge, ON	Potential for U.S. volume sourcing or shifting allocation
Jeep Compass	Coming to Brampton in late 2025	Re-tooling to secure USMCA compliance
Infiniti QX50 / QX55	Mexico	U.S. sales halted; production unaffected elsewhere
Hyundai IONIQ 5 / Tucson etc.	U.S. / Mexico / Canada distribution	Redirected models; U.S. assembly expanded

Honda: Civic & CR-V (Alliston, Ontario)

- **Civic and CR-V** exports to the U.S. account for approximately 80% of Alliston plant output—making Honda highly exposed to new tariffs.
[supplychaindive.com+9TD](#)
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- **Short-term:** Honda built inventory ahead of the tariffs and continued existing investments, including a C\$15 B EV/battery supply chain plan in Canada, despite uncertainty.
[auto123.com+1](#)
- **Medium-term:** The automaker is exploring shifting some production from Canada and Mexico into U.S. plants (like Marysville, Ohio) to avoid duties.
[YouTube+4supplychaindive.com+4Automotive Dive+4](#)
- **Financial impact:** Honda's Q1 profit halved—thanks to ¥125 B (≈US \$846 M) in tariffs. It now projects full-year tariff exposure at ¥450 B down from ¥650 B.

GM: Silverado, BrightDrop EV600/EV410 & Traverse (Oshawa/Ingersoll)

- **Silverado and Sierra** pickups built in Oshawa face heightened costs for accessing the U.S. market.
- **BrightDrop EV600 and EV410** electric vans are built at GM's CAMI plant in Ingersoll—these exports are also vulnerable unless they meet USMCA compliance rules.
- **GM's response:** accelerating localization of U.S. battery and EV supply chains; partially shifting production and increasing engine/transmission content sourced domestically to reduce penalties.
- The **Chevrolet Traverse** is U.S.-assembled, so it is less directly affected by Canadian-centric tariffs.

Stellantis: Charger, Pacifica & Jeep Compass (Windsor & Brampton, ON)

- **Chrysler Pacifica and Dodge Charger** built in Windsor were idled for two weeks in April, affecting ~3,800 workers, as Stellantis evaluated export prospects to the U.S. under tariffs .
- **Jeep Compass** production is being moved to Brampton by Q4 2025 via a C\$1.32 B retooling investment—aimed at USMCA-compliant passenger vehicle manufacturing.

Ford Mustang GTD & F-150 (Canada/Michigan)

- The **Mustang GTD**, assembled in Markham, uses a Canadian-made motor and Canadian aluminum body. Buyers of this high-end model may be less sensitive to tariffs—but pricing and allocation remain under review.
- The **F-150** is built in U.S. plants, but heavy reliance on Canadian parts means tariffs on those components still raise costs.
- Ford is stockpiling Canadian-made engines, exploring expanded U.S. production capacity, and offering temporary discounts while postponing price hikes to late 2025.

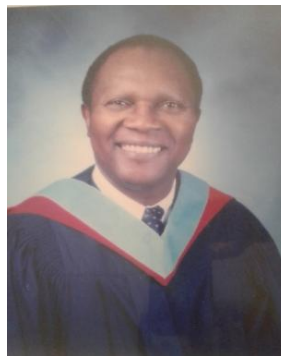
Nissan/Infiniti QX50 & QX55 (Mexico, imported to U.S.)

- Though built in Mexico, **Infiniti’s QX50 and QX55** are suspended for U.S. orders due to tariff exposure—inventory may still serve other markets.

Summary Table

Brand / Model	Origin & Powertrain	Exposure & Tariff Strategy
Honda Civic, CR-V	Canada – ICE & Hybrid	Ramp stock; explore U.S. shift; prioritize USMCA parts.
GM Silverado / EV Vans	Canada – ICE pickups & EV vans	Localize U.S. components/production; shift EV scale to avoid tariffs.
Stellantis Pacifica/Charger	Canada – ICE vans & muscle cars	Temporarily idled; U.S. shift for Compass via Brampton retooling.
Jeep Compass	Canada (after 2025) – ICE & BEV	Built at retooled Brampton plant to avoid export penalties.
Ford Mustang GTD	Canada – ICE supercar	Niche volumes; buyers less price-sensitive but allocation uncertain.
Ford F-150	U.S. – ICE trucks, using Canadian parts	Using stockpiled parts; increasing U.S. content to reduce exposure.
Infiniti QX50 / QX55	Mexico – ICE luxury SUVs	U.S. orders suspended; production continues elsewhere.

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CORPORATE STOCKHOLM SYNDROME: EMPLOYEE ENGAGEMENT IN A TOXIC WORK ENVIRONMENT

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Abstract

This study deals with the phenomenon of “Institutional Stockholm Syndrome” in which has not yet been adequately conceptualized in organizational behavior and clinical psychology literature. Stockholm Syndrome is explained by the irrational commitment mechanism developed by individuals against authority figures that suppress or threaten themselves. When this phenomenon is adapted to business life, employees emerge as toxic leadership, bullying and loyalty to the organization despite the unjust business environments. Although employees are deprived of psychological security, it is seen that they remain connected to the workplace through various unconscious processes and learned behavior patterns. The research has been prepared based on literature screening and evaluates the concept from the perspective of both clinical psychology and organizational behavior. Clinical Psychology Approach reveals how the phenomenon can be explained through cognitive distortions, learned helplessness, trauma, and dependent personality patterns. Organizational behavior approach examines the reflections of the phenomenon in organizational culture by establishing concepts such as toxic leadership, organizational commitment and psychological contract violation. Findings show that employees are motivated to stay in the workplace with factors such as tendency to submit to authority, the desire to avoid uncertainty and fear of losing job security. The data obtained show that Corporate Stockholm Syndrome has abundant effects on both individual welfare and organizational productivity in the long term. In this context, mental problems such as burnout, anxiety and depression occur in employees; In organizations, it is understood that strategic advantages such as innovation, creativity and employee commitment have weakened. As a result of the study, it is emphasized that policies for increasing psychological security in organizations, ethical leadership practices and open communication culture are critical in preventing these irrational commitment patterns. For future research, it is recommended that scale development studies to clarify and measure the concept.

Keywords: *Clinical psychology, Corporate Stockholm Syndrome, employee commitment, organizational behavior, toxic leadership.*

Introduction

In the literature of organizational behavior, the loyalty of employees is often considered as a positive value. However, in some cases, the fact that employees commit themselves to the organization despite unhealthy organization conditions and forms of toxic leadership raises a remarkable paradox. This is called “Corporate Stockholm Syndrome” in the literature and is at the intersection of psychology and management sciences. Stockholm Syndrome was first defined in the context of hostage situations, and individuals have developed an irrational commitment to people who threaten themselves. This concept has been adapted to different fields such as social relations, domestic violence and business life over time. This syndrome, adapted to the business environment, can be explained by employees maintaining their loyalty to the organization despite the oppressive management style, mobbing practices or unjust performance criteria. Cognitive contradiction mechanisms and learned helplessness play an important role in the behavior of employees (Festinger, 1957). The individual can choose not to abandon the organizational structure in which he is rationalized by negative conditions. Although this preference aims to protect job security in the short term, it has negative consequences on both psychological health and organizational productivity in the long term. From the perspective of clinical psychology, Corporate Stockholm Syndrome is associated with trauma, dependent personality patterns and low self-value perception. Although it is exposed to oppressive behaviors applied by the employee, administrator or institution, it does not lose the feeling of belonging. When examined from the perspective of organizational behavior, toxic leadership, authoritarian management approach and psychological contract violations show how this irrational commitment is reinforced on the institutional ground (Einarsen, Aasland & Skogstad, 2007). In recent years, research shows that employees' adherence to the organization even in toxic work environments is not only an individual choice, but also a process supported by organizational culture. For this reason, Corporate Stockholm Syndrome has become an important field of research not only an individual psychological problem, but also in terms of the sustainability of organizations and ethical management approach. In this article, the phenomenon in question, both clinical psychology and organizational behavior perspectives, theoretical foundations of the concept, individual and institutional consequences and preventive strategies will be discussed.

Methodology

This study was prepared using the literature screening method. The main purpose of the research is to examine the concept of Corporate Stockholm Syndrome from the perspectives of organizational behavior and clinical psychology, to reveal the connections between the current academic studies and to clear the theoretical framework of this concept. In the study, any field research or quantitative data collection method was not used and a conceptual examination based on secondary resources was conducted. Within the scope of the literature screening, basic sources of psychology and management science on articles, academic books and theoretical origins of the concept were examined. From the literature of clinical psychology in which Stockholm Syndrome was first defined, how the phenomenon is adapted to business life was questioned and associated with concepts such as toxic leadership, mobbing, organizational commitment and psychological contract violation in organizational behavior literature. In this context, both individual psychological mechanisms and organizational cultural elements were evaluated (Meyer & Allen, 1991). In the process of transportation to resources, academic databases such as Google Scholar, Jstor, Proquest, ScienCect and Springerlink were scanned; Keywords such as "Stockholm Syndrome", "Corporate Stockholm Syndrome", "Toxic Leadership", "Organizational Commitment", "Trauma Bonding" and "Psychological Contract Breach" are used. The scanning process was limited to the studies published after 2000, but some classical sources were also used to understand the origins of the concept (Seligman, 1975). The publications included in the study were selected from the works that discuss the theoretical dimension of the concept and offer applicability in organizational context. The methodological approach is not a systematic literature review, but more conceptual screening and theoretical discussion methods are adopted. For this reason, the article focuses on multidimensional explanations and interdisciplinary relationships of the concept instead of comparing the data obtained with quantitative criteria. Thus, the place of Corporate Stockholm Syndrome in the literature was determined and a ground for future empirical research has been prepared.

Literature Review

Stockholm Syndrome was first conceptualized after a hostage crisis in Sweden in 1973. It has been observed that individuals in hostage develop an irrational sympathy and commitment against authority figures that threaten them. In psychology literature, this is explained by trauma bonding and cognitive contradiction mechanisms. Trauma binding is handled as an emotional proximity to the figure, which is a threat of survival of the individual; The theory of cognitive contradiction argued that the person maintains his belonging with his efforts to rational negative experiences (Festinger, 1957). The concept of Stockholm Syndrome has also started to be used in the

context of individual violence, domestic abuse and organizational relations. Despite the oppressive leadership style, mobbing practices and unjust performance criteria in business life, the commitment to the organization is considered as a reflection of this syndrome in the corporate context. In particular, toxic leadership forms create a kind of compulsory commitment mechanism by creating fear and pressure in employees. However, the fear of losing job security, the tendency to avoid uncertainty, and the limitation of alternative job opportunities reinforces this irrational commitment. Commitment in organizational behavioral literature is usually examined through the emotional, normative and continuing commitment of employees with the organization. However, Corporate Stockholm Syndrome intersects from these types of commitment especially with continuing commitment. The employee sees staying in the organization as a necessity despite the negative conditions. Such commitment increases the passive adaptation behaviors of employees rather than contributing to organizational efficiency (Meyer & Allen, 1991). Therefore, although the organization has apparently affiliated employees, it may deprive strategic gains such as innovation and creativity in the long run. The Perspective of Clinical Psychology deals with Corporate Stockholm Syndrome within the framework of dependent personality patterns, learned helplessness and emotional abuse cycle. According to the learned helplessness approach, the individual develops a passive harmony, believing that he cannot change these conditions when he has continuous negative experiences. This leads to employees to stay in toxic work environments (Seligman, 1975). In addition, employees with dependent personality traits are more prone to accept negative conditions, fear of losing the sense of belonging provided by the organization. In recent years, research has shown that toxic leadership and workplace bullying have destructive effects not only on individual prosperity, but also on organizational sustainability. The employees rationalize the oppressive management styles they are exposed to, trigger problems such as burnout, depression and loss of motivation in the labor force. In contrast, some studies state that such irrational commitment mechanisms can reduce the period of labor in the short term, but there is a consensus that long -term effects are extremely negative. When the literature is examined, it is seen that the concept of institutional Stockholm Syndrome is still handled by a limited number of academic studies. However, the concept is strongly related to issues such as toxic leadership, violation of psychological contract, organizational commitment and psychological security. Interdisciplinary studies to be carried out in the field of both clinical psychology and organizational behavior will provide a better understanding of this phenomenon and the development of preventive strategies in organizations.

Argument

The concept of Corporate Stockholm Syndrome offers a critical framework to understand the dynamics of irrational commitment in business life. Although the employees' adherence to the organization in the face of toxic leadership and negative organizational conditions seems to be a phenomenon that can be evaluated positively at first glance, such as organizational loyalty, it reflects a contradiction that can be explained by deep psychological mechanisms. At this point, the basic argument is that irrational commitment within the organization damages both individual psychological health and corporate sustainability. The first argument is that the irrational commitment of employees is the result of a lack of psychological security. The employee chooses to hold on to the organization in order to maintain its own existence in environments where making mistakes are punished, ideas are suppressed and a continuous climate of fear. This type of commitment is a defense mechanism formed by the internalization of the negativity of the individual rather than a rational choice. In this context, the findings about how Stockholm Syndrome work in individual violence relations are similar to the power relations in organizations (Namnyak et al., 2008). The second argument is that Corporate Stockholm Syndrome coincides with the "continuation commitment" in the organizational commitment literature. The continuation commitment argues that the continuation of the individual is not due to the benefits of the organization, but from the costs of separation. It shows commitment because it does not afford to leave the organization in toxic work environments. This apparently causes loyalty to the organization and causes employees to passively move away from innovative behaviors (Meyer & Allen, 1991). Therefore, the organization may experience serious losses in terms of performance and creativity in the long run, even if the adherence indicators are high. The third argument is that Corporate Stockholm Syndrome is fed not only from individual psychological processes, but also from the structure of organizational culture. The lack of fear-based leadership styles, performance systems that operate with the balance of reward-money, and the lack of open communication channels reinforce this irrational commitment. The organization creates an environment that nurtures the emotional dependence of employees with its own internal dynamics; This ensures the continuity of the syndrome. As a result, Corporate Stockholm Syndrome is not only an individual psychological problem, but also a structural phenomenon in which organizational culture produces and feeds. For this reason, the solution of the issue is possible not only by individual psychological interventions, but also by developing ethical leadership, psychological security and justice-based management in organizations.

Finding

The findings obtained as a result of literature examination show that Corporate Stockholm Syndrome has multi-faceted effects both at individual and organizational levels. Firstly, it was determined that cognitive distortions play an important role in the employees' toxic work environments. The employee perceives staying in the workplace as a kind of necessity by rationalizing negativities, thus trying to maintain his own psychological balance. Although this helps the individual to maintain job security in the short term, it creates serious psychological costs in the long run. Findings that employees have become widespread in burnout, anxiety and depression support the clinical psychology dimension of the issue. Secondly, it has been found that there is a strong intersection between "continuation commitment" in organizational behavior literature and Corporate Stockholm Syndrome. Employees often see maintenance as a necessity for the costs of separation, not as a choice. Although such commitment strengthens the perception of loyalty in the workplace, it has negative consequences in terms of organizational performance. Behaviors such as innovation, creativity and entrepreneurship decrease, and instead of a passive adaptation process (Meyer & Allen, 1991). Thirdly, the decisive effect of organizational culture on employee commitment is clearly seen. Especially fear-based leadership styles, mobbing practices, unfair performance evaluations and communication channels are closed as factors that feed the Corporate Stockholm Syndrome. Under these circumstances, employees try to protect their own existence by clinging to the limited sense of security and belonging provided by the organization. Such cultural dynamics cause employees to develop loyalty to the organization in an irrational way. Finally, the studies in the literature also point to the long-term costs of this syndrome for organizations. Organizations with apparently affiliated employees are actually faced with low motivation, weak innovation capacity and high level of labor burnout. Research reveals that such irrational commitment mechanisms are incompatible with sustainable organizational success (Einarsen, Aasland & Skogstad, 2007). This finding shows that Corporate Stockholm Syndrome is not only an individual psychological problem, but also a fundamental problem of organizational management approach.

Conclusion

This study examined its position in the literature by taking the concept of Corporate Stockholm Syndrome from the perspectives of organizational behavior and clinical psychology. The findings show that employees' adherence to the organization despite the toxic work environments and oppressive leadership styles are related to psychological defense mechanisms rather than rational preferences. Processes such as cognitive distortions, learned helplessness and trauma attachment lead to the acceptance of negative conditions of

employees; The structural features of organizational culture reinforce this irrational commitment. One of the results reveals that this phenomenon intersects with the continuation commitment in the organizational commitment literature. The employee sees staying in the organization as a necessity because of the costs of separation. This form of commitment can reduce the labor period in the short term, but it creates wear out on long -term innovation, creativity and organizational performance (Meyer & Allen, 1991). In this context, the apparent commitment indicators actually point to a hidden risk factor that can endanger the sustainability of organizations. Another result of the study is that Corporate Stockholm Syndrome is not only an individual psychological problem, but also a structural phenomenon fed by organizational culture. Toxic leadership, mobbing practices and lack of communication cause employees to develop irrational loyalty, and this reveals the weakness of ethical management in organizations. Evaluations in the literature emphasize that ethical leadership and psychological security culture play a critical role in preventing such irrational commitment (Einarsen, Aasland & Skogstad, 2007). Corporate Stockholm Syndrome should be considered as a multidimensional phenomenon that adversely affects both employee welfare and organizational productivity. For this reason, organizations need to develop policies that will increase the psychological security of their employees, adopt the understanding of ethical leadership and strengthen open communication channels. It is recommended that future empirical researches develop scales to measure this concept and examine how the phenomenon emerged in different cultural contexts. In this way, the construction of healthier work environments will be possible at both individual and organizational levels. In addition, this article has shown that Corporate Stockholm Syndrome fills an important conceptual gap at the intersection between individual psychology and organizational behavior literature. Although the employees' adherence to the organization despite the negative work conditions is seen as a phenomenon that can be evaluated at first glance, such as loyalty and organizational commitment, it is actually based on irrational psychological mechanisms. Processes such as cognitive distortions, learned helplessness and trauma attachment lead to employees to accept toxic conditions and legitimizing them with commitment to the organization. This damages the psychological prosperity of individuals and threatens the long -term success of organizations. One of the important consequences of the study is that Corporate Stockholm Syndrome is fed not only at the individual level but also from the structural features of organizational culture. The closed oppressive leadership styles, mobbing practices, unfair performance criteria and communication channels cause employees to develop irrational loyalty. This commitment can reduce the labor period in the short term, but in the long term, organizational innovation and creativity seriously prevent (Meyer & Allen, 1991). Although organizations tend to see such commitment as a true advantage, this commitment

actually creates a labor force away from passive harmony and innovation. Another dimension of the results is the psychological costs created by this syndrome in employees. Burnout, depression, anxiety and loss of motivation are among the most common results in the literature. While the employee chooses to stay in a repressive environment for fear of losing a feeling of belonging, he experiences serious mental deterioration at the individual level. This leads to both the increase in health expenses in the long run and the efficiency losses of organizations. From this point of view, institutional Stockholm Syndrome should be seen not only as an individual psychological problem, but also a critical threat to organizational sustainability. The findings of the article also reveal the importance of ethical management approach of organizations. In order to prevent irrational commitment development of employees, ethical leadership, justice -based performance management and psychological security culture need to be strengthened. Studies in the literature show that psychological security has a strong effect on innovation, creativity and commitment in organizations (Einarsen, Aasland & Skogstad, 2007). Therefore, it is critical for organizations to invest not only in economic performance, but also to the psychological welfare of their employees. As a result, Corporate Stockholm Syndrome makes the ethical, cultural and structural weaknesses of organizations visible, beyond explaining the mechanisms of irrational commitment of individuals. This concept should be handled from an interdisciplinary perspective in both clinical psychology and organizational behavior literature; Future empirical research should be supported by scale development studies for measuring the phenomenon. In addition, comparative studies to be carried out in different cultural contexts will clarify the conditions under which the syndrome has become more visible. In this way, it will be possible to better understand the concept in the academic world and to build healthier, fair and sustainable organizations in business life.

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NIGERIA'S POLITICS OF MULTIETHNIC DIVERSITY: OBSTACLES, PROSPECTS, AND LIMITATIONS TO NATIONAL DEVELOPMENT

Andrew C. Ezeanya*

Abstract

The problem of Nigeria's multiethnic diversity dates back to colonialism. At the time the British colonialists left Nigeria. They failed to unite the competing multiethnic nationalist groups with diverse cultures, languages, value systems and beliefs. Rather, the British colonial administration selectively recognizes only three ethnic majorities, namely, Hausa-Fulani, Yoruba and Igbo. The introduction to this paper shall look at Nigeria's politics of multiethnic diversity with reference to obstacles and limitation to national development of Nigeria. The writer shall re-assess and articulate ingredients of national development in Nigeria's multiethnic diversity. This work shall reveal and discuss programs of integration and federal character principle in Nigeria. The main objective of integration and federal character principle was to enhance national harmony and cohesion. The essence of such programs helps to contribute towards the formation of inclusive and equitable society. This article through ethnic lens will bring to fore, obstacles and limitations of achieving national character and integration in Nigeria. The paper shall identify government programs, policies and action plans, and assess Nigeria proactive measures. The paper will source secondary data from documents, government papers, journal publications, books, conference papers, seminar papers, symposiums, workshops, roundtable discussions as well as internet materials.

Keywords: *Obstacles, Prospects and Limitations*

Introduction

The advent of British colonialists in Nigeria was blamed and tipped as the basis for Nigeria's travesty after independence. Okochie (2012) in Eme-Uche, (2022) noted that multi-ethnicity was a major obstacle to achieving national unity in Nigeria. Coupled with the economic venture of the colonial masters; their main adventurous purpose was to dominate, and exploit the people of their natural resources. Nigeria became an independent nation granted by the British colonial government in 1960. It is worthy of note that before the self governing autonomy of the people of Nigeria, the British government, first of all joined different far-away ethnic nationalities with obvious and clear diversity in terms of culture, language, religion, belief, values, even mode of dressing and others. Be that as it may, the colonial British administrations identify and recognize three large ethnic blocks namely, house-Fulani, Yoruba and Ibo. The colonialist

purposely made it possible for Hausa-Fulani to emerge as the dominant ethnic group with clear influence and control over the rest in the forceful united Nigeria. But the colonial government remains salient over ethnic minorities. The recognition of these three ethnic majorities created multiethnic tensions in the areas of employment, education, resource distribution and political appointments at the national levels. Consequently, the federal character system principle was introduced in the 1979 constitution, and enthroned national integration programs. These programs were established to carry everybody along and assuage the fears of every ethnic nationality in the Nigerian project.

Methods

The paper will source secondary data from government gazettes, governments documents, government's white papers, journal publications, books, existing public records, and published works in form of annual report, conference papers, seminar papers, symposium papers, workshops, roundtable discussions as well as internet materials, based on government programs, policies and action plans, and also assesses measures consistent with the Nigeria's federal character principle and national integration.

Nigeria's Colonial Past

In many several countries, diversity is their strength such as the United States and Canada. Where as it is the opposite in Nigeria. Nigeria is at cross road. What is playing out today in terms of multiethnic disunity, disuniting Nigerians is because of merging people with diverse backgrounds in the British colonial Nigeria. Due to the yoke of diverse cultures and peoples by the British; this colonial yoke was geared for administrative convenient. Since Nigeria came into being, so much energy was directed by the past and present governments of Nigeria to unify these diverse people. Eme-Uche (2022) stated that unity in a nation, group or an organization portend a feeling of common purpose, irrespective of differences that could be ethnic, social, cultural, and religious.

However, no nation whether big or small, micro or macro will achieve greatness under tumultuous atmosphere. The British amalgamation of the two unparallel poles of the North and South further divided Nigeria. The Colonial Governor, Lord Lugard, Master of Amalgamation stated that the North and South are like oil and water, they will never mix. This implies that the North and South will never be united (Eme-

Uch, 2022, p.1). These poles apart regions were strengthened by colonial policy of divide and rule that deepened the differences between the various ethnic groups under the guise of preservation of cultural and religious practices of diverse nationalities within this colonize territory” In pursuit of their conquest, the colonial government had no intent to unite the people or create national identities that served as uniting symbols for different peoples and cultures within the territory called Nigeria.

Integration Concept

The unity of Nigeria was rallied around integration otherwise known as national integration. The concept of integration can simply be described as to make diverse parts uniform. Canadian Dictionary (1983) defines integration as to make more unified or harmonious or to bring in individual or groups as part of larger group (p.796). Unity in diversity means unifying all the forces in the country which gives the impression of being united. The fact of the matter is, “to integrate is associated with national sentiments, linguistic, cultural, political, socio-economic feelings of unity, and common ideas of life, common code of conducts, and the capability to subordinate sectarian, parochial languages to national loyalty”. However, “integrating various or diverse people for national unity can never be erected by mortar and bricks, not by hammer and chisel”; rather, “it has to develop most noticeable in the hearts and minds of the citizens”.

Character Principle

The issues of equity and fairness in the federated Nigeria led to the introduction of character principle (Mustaph, 2007). The “federal character principle can be described as an approaches or measures fashioned by the federal government to address perceived horizontal inequalities among/between different constituents groups in Nigeria”, This character principle was enshrined in “1979 Constitution”, The character principle seek to ensure equity in appointments of the citizens to public service and institutions are fair represents linguistic, ethno/religious, and geographic diversity of the country (Adamolekun, Erero & Oshionebo, 1991). Nigeria’s Federal Character commission was directed since 1996 to monitor and compel the integration agents to observe the constitutional provision and fundamental relating to national character in government employment and public expenditure.

To this end, Mustapha (2007) described federal character as positive step towards dealing with Nigeria’s nagging problem of national representation. The character takes care of fair representation that address perceived unequal representation in the federal civil service and federal institutions, which the merit principle/quota system has not balanced the reason the federal character was established because state of origin allowed in filling application forms invoke

alienation of some citizens when it comes to federal jobs and appointments.

Nigeria’s Unity Programs

The government’s sense of urgency towards making the majority and minority ethnic groups in Nigeria coexist as a rainbow nation and pride themselves as patriotic Nigerians. The government’s sense of urgency culminated/led the federal government into turning out different programs or several relevant action plans. The programs are in line with the government’s character development and nationwide integration, targeting at the citizens. In order to support this common purpose, the government’s at the center instituted the following action plans and programs listed in Okochie (2012) to include “the national youth service corps, the national symbol, federal character policy, creation of states, socialization and mass mobilization, gender relations, election of the President of Nigeria, pattern of political parties and party politics, composition of the federal executive council”. The programs arrangement is directed to move Nigeria forward and towards achieving unity in diversity. However, after years of independence, particularly after the civil war, the challenges to unifying Nigeria are still daunting. The gap across different ethnic groups, religions, political affiliations and sexes are getting wider. The situation significantly accounts for the current security challenges that further exacerbate the challenges of national unity. The issue of sectionalism, parochialism, feelings and ethnic loyalty in the minds and hearts of Nigerians still hinders the success of integration programs.

Nigeria Integration

The question that demands feedback, why is Nigeria integration of different nationalities hard to realize? Despite the fact that some scholars, academicians, students, governments and nongovernmental organizations have continuously spread awareness through conferences, seminars, symposiums, and workshops. The subject of integration, peaceful harmony and coexisting together among cultures in Nigeria has been in the front burner “since her independent in 1960” (Onyeakazi and Okoroafor, 2018). The state of “integration in Nigeria has come under continually negative influence of insecurity, poverty, deprivation, illiteracy, ignorance, corruption, poor leadership and poor governance” (Onyeakazi et al, (2018). The Nigeria’s integration program was born out of necessity as a consequent of colonial past of coalescing nationalities, sub nationalities and cleavages into one nation state.

The Nigeria federal government somehow is trying to ameliorate the multiple ethnic fears in the united one Nigeria. The government policies and programs were geared towards building a united one Nigeria out of diverse multiethnic groups, social, economic, and religious elements. On a positive note, integration was established to make stronger the citizen’s attitude,

patriotism, and national pride. As Green et al, (2009) disclosed that “the term national integration has included national cohesion, national unity and nation building”. The agenda was aimed at promoting affection and respect among those belonging to other ethnic groups and cultures, thereby makes the people’s have stronger attitude, sense of patriotism and national pride. If the wider population were committed and desires to achieve unity and some citizens’ still question the foundation of Nigeria especially the amalgamation. The feeling of nationalism, patriotism and loyalty to the nation is more of theory than practice.

Nigeria Character Principle

Analyzing character system principle; Adamolekun, Erero & Oshionebo (1991) observed that the application of the principle in the federal civil service and the military has amounted to a confused balancing of the merit principle and the quota system based essentially on states of origin. Such approaches or measures specifically targets groups “directly and associates a person’s group identity with a certain benefit”. This has had adverse consequences for both institutions in terms of discipline, moral, and overall success and efficiencies. The system character execution with regard to early formal education and inventiveness that improve the abilities of secondary and tertiary education are required to ensure equal opportunities for all citizens to compete for civil service positions on the basis of merit. However, over the years especially after the Nigeria’s civil war of 1967 -1970, the past administration had embarked on a reform process meant to address sensitive matters of inequality and ethnic domination. This ethno differences gave birth to federal character principle which was described as a direct approach to redress horizontal inequalities between diverse groups in Nigerian society. According to brown, Langer & Stewart (2012) it is a strategy that targets specific groups directly and associates a person’s group identity with a certain benefit; with affirmative action policies which provide certain positions in government, public service, educational institutions based on individual belonging to a marginalize group.

Diversity: a Paradigm of Nations

There are certain nation/states in which multiple cultural groups live together in reasonable harmony. Multi ethnic countries like Madagascar, Switzerland and Indonesia maintained the peaceful co-existence of multi ethnic groups in harmony with no domination of one group by the other. In Madagascar, linguistic and cultural similarity facilitated such harmony. A uniform educational system inherited from French colonial rule also contributed to national unity. Switzerland could be a model country in achieving these merits by allowing each group to maintain its identity, language and culture. In Indonesia common language and colonial school system promoted ethnic harmony, national identity, and integration (Anderson, 1999) cited in

(Kottak, 2002) in (Oulte, 2011). The success of diversity in any nation depends on the leadership and followership.

The failure of such diversity also anchors around the followership and leadership. The positive story of these nations revolves around their leaders, For Madagascar, Indonesia and Switzerland to tell a positive multiethnic story, it suggests that the existence of two or more ethnic groups in a given society may be characterized by peace, full of coexistence and harmony, devoid of conflict and violence. Based on this fact, the attitude of people about merits and demerits of multi ethnicity also has two categories. Some agree that ethnic societies have some useful aspects in maintaining warm relationships among diverse groups, motivating people to exchange visits, Rose & Glazer et al (1978) in (Oulte, 2011). These examples can help Nigeria’s ethnics appreciate and understand one another’s differences, natural identity and the uniqueness for better cohesion, devoid of conflicts and discriminations.

Obstacles to National Development

Absence of Rule of Law: Nigeria’s integration process is bedeviled with ethnic challenges because of the absence of the rule of law, caused by inordinate ambition in the government’s lack of respect for national constitution. “The activities of wealthy and powerful persons who think they are above the law undermine the actual respect to the rule of law”. The post civil war Nigeria gradually experiences lack of absence of the rule of law. The reality about rule of law in Nigeria is that the governments, a well to do citizens do not respect the law. The State actors, non State actors, powerful and wealthy citizens are above the law. “The absence of the rule of law is beyond comprehension in the sense that the law seems to work for ordinary Nigerians, and probably the reason why there are arbitrary use of power and cases of violations of fundamental human rights and many other right issues that are clearly undermining the proper adherence to the rule of law”. Onosode (2013) observe that “the rampant incidence of flouting of the continuation and the instrument of rule of law portends danger to building the Nigeria nation in the 21st century”.

Governance/Poor Leadership: The leadership quality and governance in Nigeria leaves less to be desired or upheld due to gross mismanagement and insensitivity to the national problem such as disunity and discord among sub nationalities and cleavages. The most disturbing aspect of leadership in Nigeria is that nobody seems frank to serve, but ready to mismanage the available resources within their disposal. Achebe (2001) noted that the trouble with Nigeria is simply and largely a failure of leadership. The Nigeria problem is the unwillingness or inability of the leaders to rise to the responsibility of personal example which is the parameter for servant leadership. However, good leaders attract good followers, poor leaders showcase

poor performance in governance. The poor leadership and governance in the country is breeding weak, docile and unpatriotic citizens, who are unhappy with the state of the nation and are seen bent towards disintegration of the nation to satisfy ethnic sentiments and primordial interest (Onyeakazi & Okoroafor, 2018).

Nepotism/Ethnicity: The tribalism and nepotism going on in Nigeria is unbelievable, which Lord Lugard captured clearly in his colonial experience. Lugard regards Nigeria's north and south as "oil and water which can never mix". Even in the south, there are mixed feelings of unity because of ethnically diverse language, culture, and markedly different ways of life. The ongoing dichotomy in Nigeria, as Okoroafor et al (2016) observed "a lot of Nigerians are ethnocentric in their perception of issues concerning the integrity of the nation as a united democratic entity" Their behavior exhibits tribal inclinations and antecedents that aggravate poor state of solidarity and unity among ethnic groups which ultimately creates social tension and disorder. The attitude of nepotism which further fuels disunity has not helped Nigeria's efforts towards nation building and integration. Okoroafor et al (2016) again state that "this status quo is obviously anti-national unity because it breeds national discord, disunity and fear that undermine national integration.

Insecurity: The ongoing insecurity in Nigeria started somewhere in the northern area of Nigeria. The insecurity is spreading to every nook and cranny of the country. The question is how can integration take place in a country where security of life and property is not guaranteed? Nigeria has never been this insecure. What is going on in Nigeria's security architecture that leaves much to be desired? The political leaders lack political will to address this problem. The issues of terrorism occasioned by Boko Haram bombings, kidnappings, herdsmen/farmer clashes, armed robbery and banditry, rising levels of religious intolerance, hate motivated speech and actions depicts Nigeria as a killing field perhaps one of the most disunited and disjointed countries. In clear terms, insecurity stands as one of the obstacles challenging the building of strong national integration that can help the country to forge ahead with significant development strides (Udeh, Okoroafor, & Ihezue, 2013). The end of insecurity in Nigeria is not in sight. The threats by different armed groups in Nigeria continued unabated. The federal security architecture seems to be overwhelmed. The efforts by governments to end the insecurity seem to be failing, hence, the upsurge of terror attacks at government facilities, churches, villages and communities. So this precarious situation made the agenda of national integration and the federal character principle unrealistic.

Limitations to National Development

The differences between the various ethnic groups in Nigeria were further accentuated by these nationalities

on the eve of independence. These nationalities adopted the same divide and rule policy in their struggle to control state apparatus at the national level (Eme-Uche, 2022). Indeed, Nigeria with innumerable diversities is composed of many sub nationalities, cleavages, communities, races, classes, languages, and subcultures. In this respect, Oulte (2011) observed that whenever there are multiple ethnic groups, there exists a dominant group which controls power, and resources; the minority groups are subordinate to the dominant group.

These arrangements facilitate the exploitation of minority group, which impacts the achievement of national development. Oulte (2011) again "holds the view that in a society with two or more ethnic groups, conflict may arise because the roots of ethnic conflict can be political, economic, religious, linguistic, cultural or racial". The reasons ethnic differences lead to conflict as stated in (Kottak, 2002) include: a sense of injustice because of resource distribution; economic or political alienation, prejudice, discrimination, hostility, unwillingness to interact, ethnic centrism, ethnocide, forced assimilation, cultural colonialism and sharp intolerance coming from diverse religious belief, language, skin color, customs and gender.

These limitations to development arise from social tensions, corruption and illiteracy, lack of urbanization. This situation directly affects national unity and integration. The minority within majority create diverse issues in their respective regions. The multiethnic diverse in Nigeria evokes the differences in culture, religion, belief system, traditions and values, with a cycle of poverty affects national development. Oulte (2011) posits that domination; conflict and instability are inevitable features of plural societies. This is because each group considers its culture as superior over the other and any culture outside are inferior. Be that as it may, good governance and success of democracy depend upon good leaders. But most Nigerian leaders are selfish and unscrupulous. They either work for their vested interests or they do not care for the national interest. In the main, such leaders become a hindrance to the path of national unity.

Prospects in Nigeria's Diversity

The word *mutatis-mutandis* means "with things changed that should be changed or once the necessary changes have been made". In this regard and in the case of Nigeria, a necessary serious change needs to be made for better prospects in Nigeria's diversity because multiethnic diversity is a national strength. In the foreseeable future, can Nigeria achieve greatness and pride itself among the comity of nations? The feedback is difficult to supply the answer. The present leaders in Nigeria's political space are more preoccupied with selfish ambition, self aggrandizements, kickbacks, favors, godfathers, luxury and affluence with little knowledge of issues bothering leadership and governance. The writer believes that the prospects of salvaging Nigeria by any possible means

are in serious doubt. The attempt made by the past leaders in Nigeria, more especially after the independence to achieve distinction, glory and excellence is destroyed by the invasion of foreign fighters in Nigeria's geopolitical space. The insecurity created by Boko Haram terror group, Isis of West African Province, other splinter terror groups are not named here, but actively operating in Northern Nigeria and some parts of Southern Nigeria, clearly obstructing, and derailing ethnic coexistence and unity discourse in the country.

Recommendations; Multiethnic diversity is the strengths of a nation and should not be allowed to die. The constitution, the nation's supreme road map should be allowed to work. The governments and the citizens need synergy for a common purpose. That can be done if the citizens can eschew cultures, ethnics and belief differences and move Nigeria forward. The government should engage the youths by creating employable jobs for graduates and also promote national youth service corps in the country.

Majority Ethnic Nationality in Nigeria

1. Hausa –Fulani Ethnic Group



2. Yoruba Ethnic Group



3. Ibo Ethnic Group



1. Sources: <https://www.alamy.com/stock-photo/hausa-fulani.html>

2. Sources: Omotosho (2022) <https://www.pulse.ng/lifestyle>

3. Sources: Okonkwo, (2014) <https://www.premiumtimeang.com>

Conclusion

The colonial government put together Nigeria's multiethnic groups and its political system to favor some ethnic grouping which disfranchised many groups. The colonial fashion enthroned in Nigeria polarized political system along ethnic lines. The Nigeria's ethnic nationalities were set against one another for the advantage of the colonial masters and for inordinate and selfish ambitions of the political elites. The emergence of Nigeria was the beginning of ethnic nationalism and has deepened further, up till this date. The ethnic sectionalism and nationalism has eaten deep and deeper into the fabric of Nigeria's party politics, governance, business, and employment. The religious adherents', dichotomy issues between Christian and Muslim as dominant faith/population are not helping matters in terms of politics and religion which fuel division and creates unnecessary challenges.

Colonialism laid the foundation for the national unity but the challenges are persistent in Nigeria today. The corporate Nigeria entity, coupled with actions and utterances strengthened by the nationalist queried continuously the basis of Nigeria's existence. "Some independent nationalist then and echoed now, described Nigeria as a mere geographical expression created by the administrative convenience of the colonialists." The regional support helps to motivate politicians and leaders to advance selfish ambition, principally protected through loyalty and warped the foundation of Nigeria which disrupts efforts towards achieving national unity.

National unity cannot be achieved through policy initiation or imitative and constitution. The necessary areas are the hearts, souls, and minds of the citizenry which requires appreciable change through valued orientation, perhaps mass mobilization and their material conditions. National unity remains daunting if the issued mindsets of Nigerians are not in the

forefront or *primus inter pares*. Because the blame for or against colonial challenges and the elites in Nigeria's unity project is still negative, not in the positive nationalism. Even Nigeria's economies and individualistic praxes have corruptive tendencies in the negative nationalism.

Therefore, Nigeria's economism and individualistic praxis ended in the negative nationalism. "Economism refers to a doctrine that emphasizes pro-growth, openness, laissez-faire policies, dynamic comparative advantage, and limited government intervention in analyzing economic success". The difficulty to change the mindsets of ordinary Nigerian citizens because of warped socialization processes and the manipulation of Nigerians by the elite makes patriotism and loyalty to the nation hard to attain. This is where the National orientation agency role is important in this regard. The re-orientation program should be well funded to enable the agencies to re-engineer its mandates by focusing towards fostering national unity with equity, justice and good conscience.

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NEW TRENDS IN A CHANGING WORLD

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Abstract

Throughout modern human history, the struggle of individuals for freedom, rights, and presence in the public sphere has shaped societal development. In this process, civil liberties, human rights, and secularism have constituted the fundamental pillars. Rights such as the right to life, freedom of expression, and freedom of belief — which every individual inherently possesses — are the guarantees of human dignity and democratic order. Through these rights, individuals are not merely citizens in relation to the state, but rights-bearing subjects.

Secularism safeguards freedom of belief by ensuring that the state maintains an equal distance from all faiths, thus promoting social peace. The legal protection of these freedoms is provided through constitutional systems. A constitution defines the structure of the state and regulates the relationships among its branches; the principles of separation of powers and the rule of law prevent arbitrary practices.

Every constitutional system is based on a political regime; regimes such as democracy, autocracy, and theocracy define how power is acquired and exercised. In democratic regimes, political parties are the primary tools for reflecting the will of the people. Principles such as pluralism, participation, and freedom of expression are central in this system. Democracy is not only limited to elections but is also a way of life sustained through active citizenship.

In the institutional functioning of democracy, the rule of law holds central importance. All state actions must be carried out within the framework of law, judicial independence must be ensured, and no individual or institution should be above the law. However, today, democracy and the rule of law face serious threats such as global terrorism, authoritarianism, economic crises, and security concerns.

Meanwhile, scientific developments such as biotechnology continue to transform human life, making it essential to uphold ethical boundaries. Globalization has facilitated the spread of capital and trade, but it has also brought challenges regarding the protection of local economies, labor rights, and environmental sustainability. Digitalization has increased access to information, yet it has also led to new threats such as disinformation, data insecurity, and violations of privacy.

Mass media should act with the responsibility of informing society; otherwise, it may turn into a tool for manipulating public opinion. Art and religion contribute to individuals' quest for meaning, while also playing a vital role in collective memory and cultural unity. Ensuring that these domains remain within the realm of individual experience may help prevent social conflicts.

In conclusion, for humanity to move toward a freer, more egalitarian, and just future, it is necessary to foster social awareness, ethical values, education, and a participatory understanding of citizenship alongside political reforms. These values serve the elevation of both the individual and society and constitute the essence of the historical struggle for freedom.

Keywords: *Constitutional Systems, Bio-Technology Age, Democracy, State, Religion, Economy, Law, Human, Human Rights, Public Freedoms, Secularism, Art, Political Parties and Regimes, Terror and Terrorism, Life.*

Introduction

Humanity is experiencing a period of intense economic systems, political reforms and cultural interactions, as a result of scientific and technological innovations. This great change, which forces people to re-examine themselves and the institutions that form their values, excites the emotions of people all over the world, accelerates the change and increases their consciousness.

The most important feature of the 2000s is the fact that information and technology completely direct human thought and life in an integrated manner. Undoubtedly, the local and major wars, the formation of industrial society, the transition from there to information society, the transition from labor-intensive technology to high artificial intelligence technology, the transition from national economies to universal economy, the shift from monarchy to representative democracy and then to participatory democracy, the transition from the understanding of respect for the rule of law and human rights to practice, the transition from totalitarian systems to single-party dictatorship to a democratic state of law, the transition from ideological dogmas to information and reality, the transition from a bipolar world to a multipolar world, the adoption of a universal lifestyle, the bringing together of people with music and art and sports, have emerged as a reflection of the extraordinary information activity in mass media.

Large-scale social, economic, political and technological changes are formed gradually, and after the formations are completed, they affect first their own environment and then others in a short time. New changes take shape and become the source of subsequent changes. The multi-faceted change and integration that occurs in the world is clear. The new worldview is formed in the light of the accumulations of the past. There are undoubtedly many worldviews. People are moving away from traditional understandings and gaining understanding and views within the integrity of the technological restructuring.

Human; examines his moment, tomorrow, himself, his environment, society, culture, belief, is in a series of responsibilities that go from personal responsibility to universal problems. We tried to reveal conceptual clarity to those who feel responsible for both themselves and their environment and who have the understanding of turning their thoughts into action. For this, we wanted to give political, social, economic problems in context with development motifs and positive orientations. We will neither approach the legendary world of the Christian world mentioned in the Bible and the changes, developments and orientations in humanity, nor will we look from the perspective of the dreaminess of realizing life in the early periods of Islam, nor will we interpret everything in a liberal, capitalist, secularist way where economy will determine everything. We will try to objectively understand humanity's new orientations, the reasons for change and reaching reality, and why in the light of the known facts of the past, as valuable principles.

As the Cold War gave way to increasingly hot conflicts, the variety of weapons and the increase in armament also accelerated. In the multipolar world, the struggle for dominance and power in every field continues without any boundaries or rules. We will try to emphasize the importance of establishing peace and tranquility that will embrace humanity by staying away from military adventures that will bring defeat instead of service to humanity.

Today, North America and Europe are integrated with information services and electrosonic technology. The impact in other regions is large and complex. The concept of service to humanity is changing in every way.

There are a series of problems such as the increase in trade due to the increase in drug addiction, nuclear accidents, biological attacks, pollution of the universe, hunger, unemployment, corruption, budget deficits, income inequality, and the gap between developed and developing countries. These problems are common problems of humanity. International studies for solutions are aimed at combining information and resources. Now, each country cannot solve its own problems with its own information and resources.

In addition to multifaceted elements, the real analyzer is the human being in an effort to re-understand his own reality. What it means to be human must now form codes that determine his place and importance on earth and in the universe.

1. PUBLIC FREEDOMS, HUMAN RIGHTS, SECULARISM

1.1. Public Freedoms

Freedom is not a one-sided concept but a multi-faceted one. In essence, it is unique. Interpretations differ according to perspectives. The individual should be free from all kinds of compulsions and external pressures. In belief, thought, in short, in every stage of life, a person should be independent above all else. He should live in his own world without other guiding forces. He should have his own willed power within his own sovereignty.

Almost all worldviews are libertarian. However, the meaning is equivalent. Freedom is not the ability to do everything that does not harm others or that the state allows. In the period when the government allows certain areas by the political authority and in the environment where guiding mechanisms are effective, it is clear that freedom has no other meaning than a chain. The concept should be considered as something that is felt and heard. In one's daily life, one should feel and feel the existence of freedom in one's own being. Because freedom has interconnected aspects. Each of these is completed by the other. Freedom, which is unique in its essence and existence, is a whole with its various aspects.

1.2. Human Rights

Human rights are the fundamental rights and freedoms that every individual is born with, and the protection of these rights and the prevention of their violations constitute the cornerstones of a just, equal and free society. Human rights have evolved over time and have been shaped by many philosophical thinkers, historical events and international documents. Continuous developments from the thinkers of the Enlightenment to modern revolutions have strengthened the understanding of human rights on a global level. In particular, the Universal Declaration of Human Rights adopted by the United Nations in 1948 has ensured the acceptance of human rights norms in the international arena and created a universal framework in this area.

The protection of human rights is not only the responsibility of states, but also of international organizations, civil society organizations and individuals. In this context, states are obliged to ensure human rights in their domestic laws and monitoring mechanisms have been developed against human rights violations at the international level. However, human rights violations still constitute a serious problem today, and phenomena such as authoritarian regimes, war zones and discrimination pave the way for rights

violations. Human rights violations such as war crimes, torture and social discrimination necessitate global interventions.

Human rights are defined as fundamental rights and freedoms that every individual is born with and that states and other authorities must not violate. These rights are necessary for people to live with dignity, move freely, be treated fairly, and be protected from various forms of discrimination. Human rights are universal, equal, and indivisible. In other words, all people are born with these rights and should never be deprived of them (United Nations, 1948).

1.3. Secularism

Secularism is a principle that regulates religion-state relations in modern societies and aims to guarantee the right of individuals to freely choose their religious beliefs without the state intervening in religious affairs.

Secularism aims not only to ensure that the state does not discriminate between religious groups, but also to limit the influence of religion on social, cultural and political processes. In this context, secularism is a regulation aimed at preventing the intervention of religion in social and state institutions (Habermas, 2006).

Although the definition of secularism varies according to the historical and cultural structure of societies, it generally determines the state's relationship with religion while at the same time guaranteeing the freedoms of individuals. A secular state does not allow religion to interfere in state affairs in any way and accepts all citizens as equal regardless of their religious beliefs (Taylor, 2007).

2. CONSTITUTIONAL SYSTEMS

Constitutional systems are dynamic structures affected by historical, cultural and social factors. These systems change, develop and evolve over time according to social needs. Constitutional reforms are made in line with goals such as political changes, cultural transformation and social justice. With the influence of globalization, constitutional systems have become closer to international norms. In the future, constitutional reforms will take shape in a way that will ensure greater social participation, human rights and democratic norms.

Constitutional systems are the most important legal instruments that determine the basic structure of states and secure the rights of the people. The evolution of these systems has been shaped under the influence of historical processes, cultural changes, social structure and political ideologies. The history of constitutions has gone through various stages from the early period to the modern period, adapting to the needs of today's societies and international norms.

Democratization movements and globalization, especially since the end of the 20th century, have accelerated constitutional reforms. Constitutional structures that are in line with global norms have been an important step in securing democratic values. It can be said that constitutions have undergone a constant evolution in terms of adapting to social changes, social demands and international agreements.

3. POLITICAL REGIMES AND POLITICAL PARTIES

3.1. Political Regimes

The concept of political regime is one of the fundamental concepts of political science and expresses the principles on which power is exercised, the sources from which it derives its legitimacy, and how the mechanisms of power are organized. A regime is defined as a structure that is more dynamic than a state and more permanent than a government. According to Juan J. Linz, a regime is "a set of formal and informal rules that determine the establishment, functioning, and transfer of power in a country" (Linz, 2000: 255).

The concept of regime is a reflection not only of the governance structure but also of the political culture, ideological orientations and the way institutions operate. Therefore, regime analyses should not be limited to the legal or institutional level but should also take into account the socio-political context.

3.2. Political Parties

A political party is a social organization that is united around a specific ideology or program, aims to win public office through elections, and provides political representation in democratic systems. Political parties are considered one of the fundamental elements of modern democracies. Political parties are groups of individuals who share a common political view, and these groups usually advocate for a certain change or order in society. Each party is built on an ideological foundation, and this ideology shapes the party's policies, goals, and strategies.

The most important studies on the definition of political parties emphasize both their relationship with the groups they represent in society and their aim of coming to power. According to the definitions made by Hans Kelsen (1920) in Germany, a political party is "a group organized to represent the interests of society and united around a certain political ideology" (Kelsen, 1920).

4. DEMOCRACY

Democracy is defined as a form of political regime in which the will of the people is the basis for governance. The origin of the concept dates back to Ancient Greece; it is derived from the combination of the Greek words *demos* (people) and *kratos* (power).

This system, first implemented in the city-state of Athens, was based on direct participation (Held, 2006). However, representative democracy in the modern sense envisages the reflection of the will of the people in governance through elected representatives instead of direct participation.

Democracy is not only an electoral system, but also a management approach that includes many principles such as the rule of law, fundamental rights and freedoms, pluralism and separation of powers. Robert Dahl (1971) used the concept of "polyarchy" for democracy and argued that for a regime to be democratic, basic criteria such as free and fair elections, freedom of expression, and freedom of association must be met.

5. CONSTITUTIONAL STATE

The rule of law constitutes one of the fundamental pillars of modern democracies and contemporary societies, as it ensures the protection of individuals' fundamental rights and freedoms and requires that all acts and operations of the state be subject to legal oversight. In a state governed by the rule of law, where the supremacy of law is adopted as a core principle, state institutions and public authorities are obligated to refrain from arbitrary actions and must operate within the boundaries of legality.

One of the most distinctive features of the rule of law is the principle of the supremacy of law. According to this principle, no power—including the state itself—is above the law. In such a system, not only are individuals accountable to the state, but the state is also accountable to individuals and to society. Therefore, the rule of law necessitates the effective functioning of mechanisms that protect individuals against state power, such as judicial independence, administrative justice, and constitutional review.

In developing democracies such as Turkey, the construction and maintenance of the rule of law hold particular importance. As clearly stated in Article 2 of the Constitution of the Republic of Turkey, the country is a state governed by the rule of law. However, the full realization of this principle in practice depends on the genuine implementation of the separation of powers among the legislative, executive, and judicial branches; the safeguarding of judicial independence; the effective protection of fundamental rights; and the establishment of transparency and accountability in public administration.

6. GLOBAL TERROR AND TERRORISM

Global terrorism, one of the most striking and destructive phenomena of the century, has become a multidimensional security problem that threatens not only a specific geographical region or ideological group but the entire international community. In this period when globalization has accelerated, borders have blurred and communication networks have

expanded, terrorism has also evolved in terms of form, method and area of influence. In particular, the attacks in the USA on September 11, 2001 have clearly demonstrated that terrorism is no longer a local security threat but a crisis on a global scale (Laqueur, 2003).

The global nature of terrorism stems not only from the multinational dimension of attacks, but also from the fact that financing, ideological dissemination, organization, and propaganda activities are intertwined with the structural elements of the international system. This has led states to rethink their counter-terrorism strategies and the boundaries of international law (Crenshaw, 2011).

In addition, the rise of digitalization and social media accelerates radicalization processes and offers terrorist organizations a cross-border sphere of influence (Conway, 2017).

7. THE AGE OF BIO-TECHNOLOGY

Biotechnology is a branch of science that involves the commercial or industrial use of biological systems, organisms, living cells or biomolecules. It includes sub-disciplines such as genetic engineering, molecular biology, cell engineering. Biotechnology is one of the fastest growing areas of modern science and technology and is revolutionizing many sectors such as health, agriculture, environment and industry.

The Biotechnology Era is defined by biotechnological innovations, especially since the late 20th century. This era has seen great advances in areas such as genetic engineering, biological medicines, biotechnological products and environmentally friendly solutions. Important projects such as the mapping of the human genome are also symbols of this era.

The Age of Biotechnology is also shaping the future directions of biotechnology, combined with the digitalization of biological information and data analytics. These technologies are a multidisciplinary field emerging from the combination of biology, engineering, and computer science (Smith, 2020; Johnson & Taylor, 2021).

8. UNIVERSALIZATION OF ECONOMY

The universalization of the economy is a process in which economic relations around the world are increasingly intertwined. This process includes not only international trade in goods and services, but also capital flows, labor movements, and cultural interactions. Globalization means the overcoming of economic borders and the limitation of the ability of nation states to make independent economic decisions. Economic universalization has accelerated, especially since the late 20th century, with the revolution in information technologies, free trade policies, and international financial integration. The revolution in technology is one of the main factors accelerating

economic universalization. Developments in information and communication technologies, especially the widespread use of the Internet, have enabled the rapid growth of digital commerce and global supply chains. These changes have enabled the acceleration of production processes, increased efficiency, and the provision of services worldwide. For example, the widespread use of e-commerce has enabled giants such as Amazon and Alibaba to operate on a global scale (Castells, 2000).

9. MASS MEDIA'S EMBRACING OF HUMANITY

Mass media are tools that shape not only the way societies acquire information, but also social relations, individuals' worldviews, and social norms. The historical development of these tools reveals the evolution of communication styles on the one hand, and the evolution of social structure on the other. Mass media allows people to empathize on a global scale, interact with different cultures and societies, and strengthen global solidarity networks. Especially with the impact of digitalization, mass media have created new social ties and helped to gain acceptance of norms outside of traditional cultures.

The aim of this course is to examine the historical development of mass media, to examine the effects of these media on societies, and to analyze the transformative role of digital media on humanity. In addition, the processes of creating global solidarity and empathy through media will be discussed. Mass communication is the set of tools used to convey information to a mass audience. While mass media was initially limited to printed media such as newspapers and magazines, with the advancement of technology, different platforms such as radio, television, digital media and social media have gained a place in this field. Each new technological development has had a decisive effect on the evolution of communication forms.

10. ART REALITY

The way art represents reality encompasses not only the concrete world but also the deep meanings, emotions and inner world of the person behind it. However, the power of art to not only reflect reality but also transform it allows art to function as both an individual and a social phenomenon. When artists observe the outside world, they are aware that everything they perceive becomes an impression and emotion. In his work examining the historical development of art, Gombrich (2000) states that art has always been a form of representation since its beginning and that this representation is shaped by the emotional, psychological and cultural states of the artist.

Understanding how art can deviate from reality and reinterpret reality is also linked to the artist's internal effort to recreate the world outside of their

observations. According to this perspective, artists do not just see reality with their eyes; they create it by being influenced by the society that surrounds them, their past experiences, their individual memories and emotional states. This transformative power of art not only reflects the external world, but also invites the viewer to an understanding of reality beyond this reflection.

Danto (1981) emphasizes that the way art represents reality is shaped by the viewer's perception rather than the artist's intention. Looking at the world through the artist's eyes is not just about creating visual meaning, but how the viewer perceives this meaning. Since reality is perceived differently by each individual, this multi-layered structure of art allows each viewer to experience reality subjectively.

11. RELIGIOUS TRUTH

Religion is one of the oldest and most influential institutions in human history. Religion is not only a belief system, but also a phenomenon that shapes the way people make sense of the world, their moral and ethical values. The relationship between religion and reality plays a huge role in the lives of individuals, because religion guides people not only in the physical world, but also on a spiritual and metaphysical level.

Religion is a system of beliefs that is usually shaped around a belief in a Creator, God or a sacred power. However, the reality of religion is determined by a process in which beliefs are transformed into truths that are accepted and internalized at a social, cultural and individual level. Religion is an effort to make sense of human life. Religion is shaped by the answers individuals give to questions about the creation of the universe, the meaning of life and what lies beyond death. Therefore, the reality of religion is not an abstract concept but rather a concrete experience that identifies with individuals' inner worlds, social norms and cultural values.

12. TOWARDS A NEW LIFESTYLE

As we move towards a new lifestyle, socio-economic, cultural, technological and environmental factors deeply affect individuals' lifestyles and social structures. Since the end of the 20th century, in a rapidly changing world, people have not only developed survival strategies, but also reshaped the way they define themselves. This process has led to a decisive impact on the lifestyles, values and cultures of different social groups.

Digitalization has radically changed not only the business world but also the social structure and individual lifestyles. The technological revolution has made people more connected, but it has also rapidly digitized individual lives. Most people now communicate almost every hour with social media, mobile applications, online shopping and digital media.

Social media platforms are reshaping individuals' identities, interactions, and social roles. Platforms such as Facebook, Instagram, Twitter, and TikTok allow individuals to create digital identities beyond their physical world identities. These digital identities are sometimes constructed much more strongly than individuals' real identities. While the presence in the online world shapes individuals' self-esteem and social status, personal achievements have become measured by shares and likes.

This situation creates pressure on individuals to constantly update the identities they have created for themselves through social media and to display an "ideal" lifestyle. Individuals may have more difficulty in how they define themselves in the digital world, and this can lead to identity crises (Gergen, 2002).

The pressure to constantly present a "successful" lifestyle through social media can create stress on both an individual and societal level.

Digitalization has also created a major transformation in the business world. Digital platforms and applications in particular are reshaping people's working styles, business processes, and workforce dynamics. Applications such as flexible working hours, digital meetings, and virtual offices allow employees to feel more flexibility and independence. However, this can also lead to psychological problems such as digital stress, online workplace pressures, and work-life imbalance (Mazmanian, Orlikowski, & Yates, 2013).

13. EXALTED HUMANITY

Individual elevation is the process of maximizing one's own potential and reaching a higher quality of life through personal and moral development. This process is shaped by the person discovering their inner world, strengthening their relationships with society, and developing themselves both intellectually and emotionally. The elevation of humanity is not limited to developments at the societal level, but is also shaped by each individual's continuous efforts to improve themselves.

One of the most important components of individual exaltation is the goal of using one's own potential at the highest level. This process requires a person to be in harmony with both their inner values and their relationships with society. Individual exaltation is a process in which not only personal achievements but also responsibilities towards others and social contributions are important.

One of the philosophical foundations of individual exaltation is Aristotle's understanding of virtue in Ancient Greece. In his work "Nicomachean Ethics", Aristotle states that the highest goal of man is happiness. However, this happiness cannot be achieved by simply pursuing pleasures; it is possible by living a virtuous life. Aristotle argues that virtue is the

individual acting in accordance with his nature and using his potential to the best of his ability.

According to Aristotle, virtue is a concept related to doing what is right, being moderate, and keeping oneself from excessive emotions. This virtuous life makes a person happy because virtue enables a person to live in accordance with their nature.

Individual exaltation means that by adopting this virtuous lifestyle, one attains inner peace and a high standard of living.

Conclusion

Modern human history has been shaped by the individual's struggle for freedom, rights and a place in the public sphere. In this process, public freedoms, human rights and secularism form the basic building blocks. The rights that every individual has by birth, such as life, expression and belief, are the guarantee of human dignity and democratic order. Thanks to these rights, the individual is positioned against the state not only as a citizen but also as a rights-bearing subject.

Secularism, by securing freedom of belief, keeps the state at an equal distance from all beliefs and supports social peace. The legal guarantee of these freedoms is provided through constitutional systems. The constitution regulates the structure of the state and the relations between the powers; it prevents arbitrary practices with the principle of separation of powers and the rule of law.

Every constitutional system is based on a political regime; regimes such as democracy, autocracy and theocracy determine the way power is obtained and exercised. In a democratic regime, political parties are the most important tools that reflect the will of the people. In this system, principles such as pluralism, participation and freedom of expression are at the forefront. Democracy is not only a process limited to elections, but also a way of life sustained by active citizenship.

The principle of the rule of law is central to the institutional functioning of democracy. All state operations must be carried out within the framework of law, judicial independence must be ensured, and no person or institution should be above the law. However, today democracy and the rule of law are faced with threats such as global terrorism, authoritarianism, economic crises, and security concerns.

On the other hand, while scientific developments such as biotechnology are transforming human life, it is necessary to protect ethical boundaries. While globalization enables the expansion of capital and trade, it also brings with it issues of protecting local economies, labor rights and environmental sustainability. While digitalization increases access to

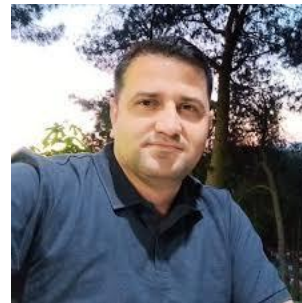
information, it has also created new threats such as disinformation, data security and violation of privacy. Mass media should act with the responsibility of informing the public; otherwise, they can become a tool for guiding public opinion. Art and religion contribute to the individual's search for meaning, and are also important for social memory and cultural unity. Keeping these areas at an individual level can prevent social conflicts.

As a result, humanity must develop social consciousness, ethical values, education and participatory citizenship as well as political reforms for a freer, more equal and fair future. These values serve the elevation of both the individual and society and constitute the essence of the struggle for freedom in human history.

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CLASSIFICATION OF COMPANIES IN CAMEROON

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INTRODUCTION AND BACKGROUND INFORMATION

Cameroon has often been referred to as Africa in miniature because of its location; near the center of the continent, as well as its diverse population, resources, linguistic and cultural groups et cetera. Cameroon being a secular state means that, freedom of worship and religion is guaranteed. Cameroon is considered to be economically stable as it is blessed with abundant natural resources such as cobalt, gas, oil, bauxite, diamond, iron et cetera (GIZ, 2012, P.32). However, Cameroon just like most of the other developing countries is with some economic problems such as low per capita income, lack of infrastructure, high level of corruption and social inequality, et cetera. Meanwhile, the business environment in Cameroon has been characterized by uncertainty, economic stagnation, political upheaval and poverty (Ngobo, 2018, P.11). Most businesses are Small or Medium-Sized Enterprises (SMEs) and the majority of the large companies are either State Owned Enterprises (SOEs) or subsidiaries to multinationals (*Ibid*). These companies fall under the diverse corporate environment of Cameroon for which this paper would be directed. Cameroon is a signatory to OHADA treaty that was adopted in 1993 in Port-Louis and OHADA functions mainly through laws known as Uniform Acts (UAs). Presently, it has adopted over 10 UAs.

In the today's Cameroon, rules of company law are mainly expressed in the OHADA Uniform Acts: particularly, the Uniform Act on Commercial Companies and Economic Interest Groups (UACCEIG); the Uniform Act on General Commercial Law (UAGCL) and; the Uniform Act on the Organization and Harmonization of Companies Accounting System (UAOHCAS).

DEFINITION OF TERMS

1. Classification: Classification is the method of arranging things or objects into groups based on their characteristics or sorting out objects into groups on the basis of common property that they have.
2. Company: Generally, a company is an association of many persons who contribute money worth to a common stock and employed in trade or business and who share profits and loss arising therefrom. The UACCEIG defines a company as a corporate person governed by public law, precisely the laws applicable in the OHADA member state where the

company has its registered office (Article 1). A company is a type of artificial person which can own property, employ people, buy and sell goods and services or enter into contracts. It can also sue and be sued (Danpullo, 2019, P.10).

- On registration, a company becomes a body corporate or corporation with a legal personality on its own, separate and distinct from its members. A corporation is thus, a person with a distinct existence from its members, who own and manage it. It has rights and obligations; it can hold property and contract on its own name; and can sue and be sued. Once a corporation is formed and incorporated, it gains a separate legal personality (Tabe, 2018, P.178.). In simple terms, a corporation is a company created by law and regulated by it.
- An industry is, the sum total of all the companies that are involved in one particular activity or group of activities. A company is thus, part of an industry which comprises many other companies that are involved in the manufacture or production of similar products and services.
- An enterprise on its part is a set of combined factors whose activities leads to production of goods and provision of services sold in the market (Sotamenou, 2014, P.1).
- Business is construed as the pursuit of commercial activities, whereby there is the buying and selling of goods and services. Business entities are critical actors in the economic, social and cultural development of every economy. Besides providing goods and services, they are a source of livelihood for many; pay taxes effectively enabling government to operate; and have an impact on the physical and social environment.
- An institution is a social pattern which develops as a result of desperate social mechanisms working in concert. Institutions emerge as social patterns molded by cultural norms. Consequently, they comprise various social mechanisms, each of which contributes an essential working part to the amalgamated whole. According to Karl Martin Ekornes (2013, P.76), 'all corporations are *social institutions*, no matter what the original contracts state, to give justification for this belief'.
- An agency is a business or organization providing particular services on behalf of another business, person or group.

For many, the notion of a church as company is a misnomer. This is perhaps because the rules regulating mainstream companies may not suit the aim and organization of religious bodies. However, churches are also body corporates per section 22 of Law N° 90/53 of 19 December 1990 on the Freedom of Association which provides that,

“religious congregations or the church consist of either any group of natural persons or corporate bodies whose vocation is divine worship or any group of persons, living in a community, in accordance to religious doctrine.”

GENERAL CLASSIFICATION

The corporate environment in Cameroon is quite diverse. The different types of companies in Cameroon have been indicated by the UAOHCAS. According to the UAOHCAS, the following could be grouped as companies keeping accounting rules and presenting reports; companies governed by provision of commercial law, state controlled companies, parastatals enterprises, mixed economy companies, cooperatives and more generally, entities producers of tradable or non-tradable goods and services, insofar as they engage either for profit or not (Article 2). Insurance companies, Banks and other financial institutions are companies of their own kind. The corporate and quasi-corporate organizations described in this study would show the range of entities that are bound to be addressed as companies in Cameroon.

1. Commercial Company:

The UACCEIG defines a commercial company as a contract between two or more persons who agree to make cash or other contributions to an activity for the purpose of sharing resulting profits or savings and contributing towards losses (Article.4). The Uniform Act makes provision for eight types of commercial companies, with five registered and three unregistered; The registered companies are the public limited companies (*Société Anonyme or SA*); private limited companies (*Société en Nom Collectif or SNC*); limited partnership (*Société en Commandite Simple or SCS*) and the joint stock (*Société à Responsabilité Limitée or SARL*); partnership company (*Société par Actions Simplifiée or SAS*). Meanwhile, the unregistered forms of companies are joint venture (*Société en Participation or SP*); de facto partnership (*Société de fait or SF*); and Economic Interest Groups (*Groupement d'intérêt Economique or GIE*). Commercial companies are the most important companies formed under the OHADA law and they form the vast majority of companies (Danpullo, 2019, P.14). They have some general characteristics; the very first is that, they are registered in the registrar of commerce and company. Under the OHADA, it is the Trade and Personal Property Credit Registrar (TPPCR), known by its French acronym as *Registre du Commerce et du Crédit Mobilier* (RCCM). This is with

exception of the SP and the SF which are the unregistered form of commercial companies. When a company is registered (incorporated), it acquires the status of a legal personality capable of exercising all the functions, rights and duties of such an entity. Another characteristic is that, commercial companies have a registered office, located in the territory of the contracting state. This characteristic distinguishes a commercial company from an international company which has headquarters outside a member state. A third characteristic of commercial companies is that, they have shareholders or partners even though, it is also possible to have a one-man company. Shears and Stephenson (1996, P.81) term this kind of companies, *corporations sole*, composed of one person (one human individual) and its successors. Commercial companies also have an object which is embedded in the articles of association for which allow all manner of activities to be conducted; and a registered capital which must also be indicated in the articles of association.

2. State-Owned Enterprise or Company

State-owned enterprises (SOEs) are companies controlled by the state rather than private actors. In other words, they are government-owned or controlled economic entities that generate the bulk of revenues from selling goods and services (OECD, 2009, P.26). They may generally be considered as parastatals. A parastatal has been defined as an organization or industry especially in some African countries having some political authority and serving the state indirectly. They are organizations that considered of significant strategic importance to the country or critical to public but may be unprofitable for the private company. In general sense, parastatal involved state-owned enterprises, public and semi-public agencies. They are legal entities created by government to undertake commercial activities on behalf of the owner. They may be independent but may also be under the supervision of a titular ministry. It is wholly or partially owned by government. They help in the procurement or distribution of commodities. Meanwhile, characteristics of State-Owned Enterprises are;

- They may be created by virtue of prerogative writs (presidential decrees) or by particular statutes, thereby coming into existence by compliance with statutory formalities which regulates their creation (Shears and Stephenson, 1996, P. 81-82).
- They may be created for commercial and other purposes (see reasons why government would want to control a company).
- In most instances, SOEs enjoy privileges and immunities which may not available to privately owned companies. In most cases, there is preferential treatment in lending rates, subsidies, taxes, access to data and information or even granting contract. Article 30 of the Uniform Act on Simplified Recovery Procedures and Measures of Enforcement

(UASRPME), 1998 as amended recently in 2023, for instance, confers immunity from forceful execution involving state-owned enterprise, territorial collectivities and public establishment. These privileges give the SOEs some comparative advantage over their privately owned counterparts.

There are three main types of SOEs: State agencies or public establishments; State corporations or state controlled companies; Semi- state or para-public corporations.

2.1. Public Establishment or State Agencies

These are statutory SOEs which run close to or as part of government departments. They are enterprises either solely owned by the government or jointly operated by the government at all levels. They are regulated by Law N°2017/10 of 12 July 2017 to lay down the general rules and regulations governing Public Establishments. They apply to the following establishments; administrative public establishments, social public establishments, hospital public establishments, cultural public establishments, scientific public establishments, technical public establishments, professional public establishments, economic and financial public establishments and special public establishments. This is proof that even social, cultural, scientific and hospital centers could be termed companies. The general aim of creating state enterprises is principally for general benefit and welfare of the general population. The National Investment Company (SNI) is an example of a public establishment.

2.2. State-Controlled Companies or State Corporation

The second category of SOEs are the fully incorporated, state controlled companies. This category of SOEs are large investments with shareholding principally owned by the state, albeit it may have other shareholders who are definitely in a minority. They could be termed the actual parastatals because, they are created for strategic importance while also undertaking commercial activity on behalf of the state. They are generally regulated by Law N°2017/11 of 12 July 2017 to lay down the general rules and regulations governing state corporations. This are public enterprises like any business entity with legal and financial autonomy engaged in an industrial and commercial activity and exclusively or majority-owned by legal persons under public law. Most of the public companies are created with a mandate to attain the objective set for them by the government.

The state controls over 100% shareholding or at least more than three-quarters ($\frac{3}{4}$) of the shares. A good example is the Cameroon Airlines Corporation (CAMAIR-Co) with 100% share ownership by the state.

2.3. Semi-Public Corporations

A third category of SOEs are listed SOEs with a more minority share (compared to state controlled) floated on stock markets. They are also known as the semi-public, quasi-public or mixed economy companies because of their hybrid nature with both the government and private entrepreneurs. It is subject to both general company law (OHADA company law rules) and the law governing public corporations in Cameroon (Law N° 2017/11 of 12 July 2017 to lay down the general rules and regulations governing state corporations). In Instances where the government does not hold majority of shares, the 2017 law governing public corporations in Cameroon shall not apply.

The law on public corporations in Cameroon defines semi-public enterprises as legal persons under private law and having financial autonomy. Therefore, quasi-public enterprises are companies jointly invested in and operated by the government and private individuals, where the capital of the government is shared with other private investors. This category of SOEs is the most common, and it is becoming more and more widespread. There can be sub-divided into three categories;

- Quasi-Enterprises where the government share-capital may exceed 50%. For example, the Cameroon Cotton Development Company (SODECOTTON) with 59% shareholding by the state, 30% by GEOCOTON and 11% by SMIC SA.
- Instances, where government may not hold more than 50% share capital, yet, the government is still the largest shareholder or still exert substantive control over the company operations.
- Instances where the government does not hold majority of the shares. A good example is ENEGIZING CAMEROUN (ENEO) with 44% of Shares owned by the Cameroon Government, 51% by Group Actis and 5% by employee.

Unlike public establishments, public corporations and semi-public corporations are not subject to the provisions of the public contract code. Each public or semi-public corporation is established by the state and shall be under the supervision of a titular ministry and financial oversight of the Ministry of Finance.

3. Entity Providers or Associations of Tradable or Non-Tradable Goods and Services

Entity providers or associations are a convention through which a number of persons pool their knowledge or activities for purposes other than to share profits, such as charity or religion (Ngang, 2008, P.7). The rules regulating mainstream companies may not suit the aims and operations of these kinds of organizations, yet they are also body corporates. The fact that, these corporate bodies are mostly exempted from tax, is a motivating factor why most entities do take these forms of companies. Entity providers may

involve; voluntary associations or civil society organizations (CSOs)/non-governmental organizations (NGOs), co-operatives/common initiative groups (CIGs) and trade unions.

3.1. Authorized Associations

These are associations of persons meeting for purposes other than carrying on a business. Associations may be established for religious, educational, literary, scientific, sport, social or charitable purposes. Law N°90/53 of 19 December, 1990 governs Freedom of Association in Cameroon, Associations fall under two systems; the declaratory system and the authorization system. Foreign and religious associations fall under the authorization system while voluntary associations under the declaratory system. (Tamfuh, 2000, P.187).

3.2. Non-Governmental Organizations (NGOs)

The legal framework governing the NGO specifically is Law N°99/14 of 22 December 1999. According to Article 4 of this Law, all associations regularly declared or all international associations duly authorized to operate in Cameroon which justify 3 years' contribution in the priority domain of law, economy, social, cultural, humanitarian, health, sports, environmental protection in Cameroon can be granted the agreement to obtain the status of an NGO in Cameroon.

The difference between an NGO and a mere voluntary association is the legal framework governing them. Associations are more liberal entities whilst NGOs are associations that are subject to certain formalities. NGOs status is granted by the government through the Minister of Territorial Administration to a duly registered association which has completed the successful three years' activity period from the date it was registered. NGO can benefit from international support whilst associations are limited to the confines of the national territory. The most common aspect between Associations and NGOs is that, they can both benefit from certain tax exemption or exoneration in conformity with the general tax code.

3.3. Co-operative Societies (CSs) /Corporate Initiative Groups (CIGs)

A CSs is business organization in which people voluntarily associate to promote their own economic interests. It is a union of persons formed, who freely enter into partnership in order to attain common goals by setting up an enterprise which is managed in a democratic manner and to which they are bound by a contract which shall in particular lay down the rules governing their activity with the organization (Ngang, 2008, P.4). CSs are the oldest forms of moral persons that local people have survived with (Tamasang, 2007, P.156). Meanwhile, CIGs are organizations of an economic and social nature set up voluntarily by individuals having common interest and working together as a group. The main difference between CSs

and CIG is that, the latter can be created solely with aim of having loans and savings. The similarities between CSs and CIG are that both are regulated by Law N° 92/06 of 14 August 1992 relating to CSs and CIG and its enabling Decree N° 92/455/PM of 23 November 1992. Both are also mostly exempted from tax. There is perhaps what the OHADA UACCEIG describes as Economic Interest Group (EIG).

4. Other Special Types of Companies

The French Code de Commerce specify a total of 17 varieties of special company. Even though the list can be non-exhaustive, they include inter alia, banking activities, insurance company and financial houses and credit unions (Tabe, 2018, Page 49). Although, these institutions have additional specific laws governing their operations, they form a corporate personality and therefore are regarded as companies.

5. Other form of Categorization of Companies

In Cameroon, companies are generally categorized into either large enterprises or small and medium-sized enterprises (MINPMESSA, 2009, P.sll 8).

5.1. Large Companies

Large enterprises are those with more than 101 employees with a net turnover exceeding one billion FCFA. Majority of the large companies, that is SOEs or multinational or foreign-affiliated enterprises, may fall under this category. Decree N° 90/1470 of 9 November 1990, fixing the Minimum Share of Credit institutions also puts the banks under this category (article 1).

5.2. Small and Medium Sized Enterprises (SMEs)

The concept of SMEs varies in context across countries, organizations and even academic communities. According to definition by the European Union, SMEs are those enterprises with less than 50 employees and a turnover or balance sheet that does not exceed 10 million Euros. For the French, SMEs are generally regarded as enterprises with less than 500 employees with a turnover of less than 40 million Euros. Meanwhile in the UK it is considered as a business with less than 250 employees with a turnover which does not exceed 28 million Euros. SMEs are very important to a country's economy as they constitute more than 95% of the economy (Tambi, 2021, P.1). In Cameroon, Law N° 2015/010 of 16 July 2015 to amend and supplement Law N° 2010/001 of 13 April 2010 to lay down the Promotion of Small and Medium-sized Enterprises in Cameroon, defines what an SME is. The Law defines SMEs as enterprises with not more than 100 employees and net sales revenue not exceeding 3 billion FCFA (Satamenou, 2014, P.5-6.). The law classifies SMEs into very small-sized enterprises, small-sized enterprises and medium-sized enterprises.

5.2.1. Very Small-Sized Enterprises

A very small-sized enterprise is an enterprise with less than 5 employees and a net sales revenue not exceeding 15 million. They are mostly sole proprietorships often dubbed micro enterprises. It could be right to say that, most partnerships, associations, co-operative societies, CIGs and trade unions fall under this category.

5.2.2. Small-Sized Enterprises

A small-sized enterprise is an enterprise with between 6-20 employees and a net sales revenue between 15-100 million FCFA. This category of SMEs form the largest number of enterprises in the country (MINPMESSA, 2009, P.119). Simon Tabe Tabe (2018, P.41) roughly equates small-sized enterprise to small private company under English Law. However, with the OHADA, it may be a rough equivalent of a private limited company and a public limited company which does not intend to sell shares to the public.

5.2.3. Medium-Sized Enterprises

Medium-sized enterprises are those enterprises with employees between 21 and 100 and with a net sale revenue between 250 million FCFA to 3 billion FCFA. Insurance companies may fall under this group of SMEs, considering the fact, their authorized minimum capital is 250.000.000FCFA in case of insurance companies. From the definition, it shows that, most of the so-called large companies already fall under this category. This makes the use of the term SMEs misleading because originally, they would appear to refer to very small, local and basically informal private enterprises of the social economy, handicraft and rural sectors.

5.3. Private Companies / Public Companies

A private company is a company which by its article of association, restricts the right to transfer its shares and limits the number of its members (Tabe, 2018, P.222). Private companies may be registered with unlimited liability or like other companies with limited liability. By limited liability, it means that, each shareholder for the debt of the company is limited to the amount of shares he/she has taken and his/her rights are represented by shares. Private companies have to comply with less stringent requirements in relation to the contents of their accounts and the profits they receive as dividends. Generally, most of the companies especially the small ones are private companies.

Public company on its part is a company limited by shares and whose memorandum states that, it is a public company. In a simplest term, a public company is a company whose shares can be sold to the public through the stock exchange market. Under the old English Law system, the private limited company and public limited company could have been the rough equivalence of the private and public companies respectively. However, this is not the case with

OHADA as they are some public limited companies which do not intend to sell shares to the public (*Ibid*, P.37).

5.4. Multinational Companies

According to the Tripartite Declaration on Principles Concerning Multinational Enterprises and Social Policy, multinational companies are those enterprises whether public, mixed or private ownership which own or control production, distribution services or other facilities outside the country in which they are based. They are corporations which operate in many different countries either as themselves or through a network of companies under common ownership. Such companies or group of companies are also called transnational corporations (Gardiner, 2003, P.264). Thus, multinational enterprises usually comprise companies or other entities established in more than one country and are so linked that, they co-ordinate their operations in various ways. They usually comprise of a holding of companies and one or more subsidiaries. Example is the MTN Group of Company.

5.5. Foreign/Local Company

Multilateral companies may be foreign or local business; a foreign company is that which, though incorporated in the host country, is wholly owned by aliens or foreigners. A good example is *Pari Mutuel Urbain Camerounais* (PMUC) that is majority of Corsicans interest.

A local business on its part is one owned and operated by a member or members of the local community. Most of the very small businesses are local companies.

CONCLUSION

The term company can be used to mean a firm, industry, corporation, enterprise, business, institution, organization, agency and even hospitals and associations like NGOs and religious bodies which albeit enjoy exemption from tax, would still fall under the category of companies. Therefore, companies can be formed and registered not only for the promotion of commerce and profit, but also for the promotion of arts, science, sports, charity or social welfare and for other purposes. Whether created by law or regulated by it, what is certain is that, companies are bound to keep accounting system, known as general accounting.

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SCIENCE POLICY IN LESS DEVELOPED COUNTRIES

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Introduction

Global parity, social well-being, and sustainable economic progress are all significantly impacted by the creation and execution of scientific policies in less developed countries (LDCs). Science policy acts as a link between national development objectives and the inherent worth of scientific research. It is defined as governmental policies and frameworks that guide the creation, dissemination, and application of scientific knowledge and technology. [Unescoarabsciencepodium.org] [1] In this piece, I discuss the main obstacles that LDCs must overcome in order to develop successful scientific policies, the opportunities that they have, and tactical suggestions for improving the science-policy interaction in situations where resources are scarce.

Challenges Facing Science Policy in LDCs

1. Inadequate governance and institutional structures Strong mechanisms for integrating national development strategy with science and technology (S&T) policy are lacking in many LDCs. For example, science, technology, and innovation (STI) policy development in Africa is still in its infancy and has few connections to more comprehensive socioeconomic planning. [Cambridge University Press & Assessment] [2] Science policy runs the risk of being incidental rather than essential to development in the absence of robust institutions to coordinate research objectives, financial allocations, and monitoring systems.

2. Limited financial and personnel resources, the lack of qualified researchers, poor infrastructure, and limited R&D funding are major challenges. According to the "mid-level entry strategy" hypothesis, some developing nations prioritize applied fields above basic science, although doing so may compromise their ability to innovate in the long run. [SpringerOpen][3] According to this perspective, LDCs may experience a vicious cycle: inadequate science capacity results in ineffective policy, which in turn results in inadequate capacity, and so on.

3. Poor connection between research and policy Because of the poor connections between researchers, policymakers, and intermediaries, evidence-informed policymaking is more difficult in LDCs. The patterns of interaction in developing environments frequently lack pathways for converting scientific information into practice or policy, according to a study by the Overseas Development Institute (ODI). [GOV.UK][4]

Conflict could occur in the absence of conversation systems, and research could become disengaged from actual development concerns.

4. Asymmetries in knowledge and global inequality the bulk of open-access repositories and scientific infrastructure are still located in developed regions, despite the fact that more nations are implementing open research laws. [UNESCO][5] This makes it more difficult for LDCs to fully engage in the global scientific community and access global information flows.

Opportunities for Progress

1. Strategic alignment of development objectives with science policy LDCs can more directly use scientific research for development results when their S&T policies are in line with national goals, such as public health, agriculture, and the environment. The UNESCO-EOLSS framework emphasizes how science can help LDCs achieve sustainability transitions. [eolss.net] [6] By doing this, scientific policy starts to focus on the good of society rather than merely research for its own sake.

2. International cooperation and capacity-building the foundations of science policy are strengthened by initiatives to increase scientific capability in LDCs (e.g., through networks, regional collaboration, or donor-supported programs). [Japan's Ministry of Foreign Affairs][7] LDCs can expedite knowledge exchange, human capital development, and institutional strengthening by collaborating with international organizations and utilizing global networks.

3. Using digital technologies and open science LDCs now have affordable opportunities to contribute to the creation and sharing of global knowledge thanks to the growth of open science. Adopting open access, data sharing, and collaborative platforms might reduce knowledge asymmetries, despite ongoing obstacles. [UNESCO][5] This in turn promotes more inclusive research ecosystems and closer ties between science and policy.

Strategic Recommendations

****Create a clear national STI policy**:** LDCs should create a policy that outlines institutional roles, financing sources, evaluation standards, and priorities. Instead of being separate, this policy ought to be incorporated into the national development strategy.

****Invest in infrastructure and human capital****: Although resources may be limited, focused investments in infrastructure, institutional capacity, and researcher training (even if modest) can produce significant long-term dividends. The science-policy relationship should be strengthened. Establish and maintain advisory groups, forums, and middlemen that connect scientists and decision-makers. It is essential to make sure that research tackles issues that are pertinent to policy and that policymakers interact with the evidence. [BioMed Central][8] ****Foster regional and global cooperation****: National science systems can expand more quickly by utilizing donor support, partnerships, and knowledge networks.

Policies should have tools to monitor performance (such as the number of researchers, publications, and innovation outputs), assess success, and modify approach as necessary. [SpringerOpen][9] ****Promote private sector participation and innovation ecosystems****: Science policy should support connections with industry, entrepreneurship, and innovation in addition to academic research.

****Strategic Recommendations for Science Policy Decision-Making in Less Developed Countries****: Effective science policy is critical for less developed countries (LDCs) to foster innovation, address local challenges, and achieve sustainable development. To strengthen decision-making in this area, a set of strategic recommendations can be considered.

First, it is crucial to ****build robust institutional frameworks****: Governments ought to set up specialized organizations for science, technology, and innovation (STI) that work with industry, research institutions, and ministries. Clear mandates, sufficient resources, and the capacity to establish long-term research priorities in line with national development objectives including health, agriculture, and climate resilience are essential for these organizations.

Second, it is imperative to invest in human capital. LDCs should support policies that lessen brain drain and promote diaspora engagement while placing a high priority on STEM education and training. The establishment of regional centers of excellence, research grants, and scholarships can boost local research capacity and produce a pool of qualified scientists and decision-makers.

Third, it's critical to improve evidence-based and data-driven policymaking. Policy decisions should be based on trustworthy data on research results, technology uptake, and innovation performance. Establishing innovation dashboards or national science observatories can aid in tracking advancements and identifying shortcomings.

Fourth, capacity-building can be accelerated by ****promoting international collaboration****. Access to capital, knowledge, and technology transfer can be obtained through collaborations with universities,

donor organizations, and international research groups. These partnerships must, however, be set up to guarantee local ownership and pertinence to domestic requirements.

Finally, ****encouraging private sector participation and innovation ecosystems**** is key. Governments can incentivize research and development (R&D) through tax benefits, public-private partnerships, and innovation hubs that connect academia with industry.

Conclusion

In less developed nations, developing effective scientific policies is a necessity for societal advancement, national growth, and competitiveness. LDCs can create customized scientific strategies that close the gap between knowledge production and social needs by acknowledging the unique institutional, budgetary, and capability limitations they encounter. Clear strategic emphasis, skills building, robust science-policy discussions, and participation in the international scientific community are important facilitators. Instead of being an afterthought, science policy may become a revolutionary tool for inclusive development with careful and persistent work.

In conclusion, comprehensive methods that incorporate institutional strength, human capacity development, data-driven governance, international cooperation, and private sector engagement are necessary for scientific policy decision-making in LDCs. By taking these steps, science and technology can become catalysts for equitable and long-term development.

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EFFICIENT ADMINISTRATION OF TAX INCENTIVES IN NIGERIA: A SMART WAY TO INCREASE DOMESTIC REVENUE AND REDUCE RELIANCE ON DEBT FINANCING

Professor Dr Christian Ndukaire Onyegbule*

INTRODUCTION

The burden of debt-servicing has recently become worrisome due to high interest rates. The news media is awash with the expressions of desires for a reduction on reliance on debt financing for the funding of socioeconomic development projectsⁱ. This is more so to protect the economy from the shocks of ever-rising cost of debt-servicingⁱⁱ and the risk of dependency.

However, it has to be noted that a reason for taking loans is the inadequacy of domestic revenue to fund government expenditure, and budget deficitsⁱⁱⁱ. Fortunately, there are options for funds for the execution of capital projects other than reliance on debt financing.

Loan as a business arrangement serves the profit motives of the lenders. An attractive option I suggest is the use of tax incentives to fund investments that foster economic growth and development. It is a popular means, used globally, to attract direct foreign investment (DFI). In Nigeria it has the advantage of being a part of the tax administration system and therefore can be used effectively (under extra scrutiny) as a tool of fiscal policy to influence investments in preferred sector of the economy.

2. THE BURDEN OF DEBT-SERVING IN PERSPECTIVE

I consider tax incentives as a preferred option to borrowing, in the choice of strategies for attracting DFI because it is cheaper. Borrowing dates back earlier than 4000 years ago^{iv}. It is said that he who is quick to borrow is slow to pay. This statement underscores the need for caution in borrowing.

As far back as 2003 some experts counselled that Nigeria should place a limit to external borrowing (Okonjo-Iweala, Soludo and Muhtar, 2003)^v and to redirect efforts in mobilizing domestic resources. Incidentally, the administrative cost of collection of taxes is far lower than the cost of debt servicing^{vi}. In addition to dependency that results from financing of projects through (especially foreign) loans, the possibility of debt overhang and tainted reputation are disincentives to investors^{vii}.

Debt (loan), in economic terms is a financial obligation that must be paid in accordance with the terms of the

loan^{viii}. The terms of loans repayments are either favorable or unfavorable. Whatever is the case, lending is a commercial undertaking driven by profit motives.

2.1 Debt trap:

More than twenty years after the alarm of debt-trap, Nigeria is still in a state of insufficiency of domestic revenue and is still taking external loans. In October, 2025 the news media reported^{ix} that the Central Bank of Nigeria (CBN) disclosed that US \$2.86 billion was spent on foreign debt servicing in the first eight months of the year. Further analysis indicated that debt-servicing represented 69.1 per cent of total external payments of \$4.14 billion. By implication only \$1.54 billion or 39.9 per cent was available for other payments such as raw materials, plants and machinery, medical equipment and pharmaceuticals. This scenario worsened the state of insufficiency of funds for critical sectors that stimulate growth in the economy. This has had negative effects at macro and micro levels of the economy. Similarly, in 2024, \$2.08 billion or 70.7 per cent of total foreign payments of \$4.33 billion was spent on the servicing of foreign debts^x.

2.1.1 Trends of Nigeria's financial debts as indicated;

- (i) 30/09/2021; N38.62 trillion (\$92.1 billion);
- (ii) 30/09/2022; N39.35 trillion (\$ 95.78 billion);
- (iii) 30/09/2023; N87.9 trillion (\$ 114.35 billion);
- (iv) 30/09/2024; N142.32 trillion (\$88.84 billion) and
- (v) 30/06/2025; N152.40 trillion (\$997 billion)^{xi}.

- The growth rate was 360 per cent.

2.1.2. Debt to GDP ratio;

- (i) 2021; 36.77 per cent;
- (ii) 2022; 40.44 per cent;
- (iii) 2023; 48.67 per cent;
- (iv) 2024; 52.9 per cent and
- (v) 2025; 52.5 per cent^{xii}.

2.1.3 Debt-service-to-GDP ratio;

- (i) 2020; 81 per cent;
- (ii) 2021; 83.2 percent,^{xiii}
- (iii) 2022; 99.0 per cent;
- (iv) 2023; 97.0 per cent and

(v) 2024; 65.0 per cent^{xiv}.

Note: As against 22.5 per cent recommend by the World Bank^{xv}.

2.2 Debt obligation

Debts, especially external debts, have strict obligations attached to them. The obligations include but are not limited to;

- (i) Repayment of principal and interest;
- (ii) Payment of other fees/expenses;
- (iii) Compliance with legal requirements which may otherwise lead to painful enforcement actions such as garnishee orders;
- (iv) The debt must be repaid in the currency of the creditor^{xvi}. This raises the issue of exchange rate and the challenges thereof; and
- (v) The debtor has to look credit worthy and is subjected to esoteric scenario analysis as demonstrated in 2.1 above.

2.3 General outlook for the servicing of foreign debts

Borrowing by emerging markets and developing economies (EMDE), from the debt market, has grown significantly, from \$1 trillion in 2007 to \$3 trillion in 2024. The cost of borrowing has become more expensive^{xvii}. According to the Organization for Economic Cooperation and Development (OECD) in its Global Debt Report, 2025, published on March, 20, 2025, the high cost of debt servicing has exacerbated the quest for refinancing of loans.

2.3.1 Nigerian perspectives

It was recently reported that Nigeria was seeking the refinancing of its debts with others with lower interest rates. This position aligns with the report of OECD. It is an indication of the heavy burden of debt-servicing and a road to debt-trap. Serious efforts should be made to increase domestic revenue geometrically to bridge the funding gap.

2.3.2 Specific impacts of foreign loans

The negative impacts of loans on debtor countries include, that;

- (a) Taxes that will be collected in the future are tied down to repayment of loans rather than to the development of vital infrastructure;
- (b) Foreign debts are denominated and repaid in the currency of the lender. This exposes the borrower's currency to the vagaries of exchange rate fluctuations. This may lead to the introduction of 'harsh' monetary policy regulations especially foreign currency restrictions. These may produce vicious cycles that end up in the refinancing of debts;
- (c) Discomforting offshore legal actions in spite of the doctrine of foreign prosecution^{xviii}; and

- (d) The possibility of a collapse of the local currency partly as a consequence of devaluation in an attempt to reduce the importation of goods. Inflation follows on its trail. The spiraling effects may trigger domestic turmoil, especially for import-dependent debtor countries.

3. COMPLEMENTARY ROLE OF TAX INCENTIVES IN THE MOBILIZATION OF FUNDS FOR INVESTMENT

I earlier made an overview of borrowing as a means of funding budget deficits. This is sometimes referred to as deb-financing^{xix}. The option of increasing tax rates as a means of boosting government revenue may not be attractive. Government may rather use the fiscal policy tool of tax incentives to influence investments in specific sectors of the economy or to expand a particular economic activity^{xx}. The expectation is that tax-savings will be reinvested to expand production of specific products. Thus, tax foregone in the present will be expected to bring about a geometric increase in tax yield in future. This is subject to efficient and transparent application of the provisions of the laws on tax incentives, by all of the regulatory agencies. Therefore, Information sharing in real time will be a sine-qua-non.

3.1 Justification for tax incentives

The fiscal policy of granting tax incentives aims at encouraging investment in the preferred sectors of the economy and to attract DFI. It is a popular strategy for encouraging DFI globally, especially by developing countries. My position is that it is a more beneficial and controllable alternative to borrowing, Tax incentive administration is a part of the general tax system and falls under the same principles of taxation, vis-à-vis in comparison with other taxpayers who are in competition with the beneficiaries of tax incentives Applying the principles evenly will optimize the expected benefits of tax incentives. Some of the principles are listed below;

- (a) Equity and fairness to all taxpayers;
- (b) Registration and filing of tax returns as required; and
- (c) Strict application of tax laws across board. This ensures effectiveness.

A synchronization and equitable administration of all aspects of the tax incentive and non-incentive regimes will close funding gaps.

3.2 Types of tax incentives

Tax incentives have a general purpose of encouraging investment, through a tax advantage, in areas desired by government. The incentives listed below, in broad terms, are popular in Nigeria;

- (a) Tax rate differentiation and accelerated capital allowances;

- (b) Tax credits and investment allowances;
- (c) Tax exemptions and zero rating; and
- (d) Tax free periods.

3.2.1 Specific types of tax incentives;

The Nigeria Tax Act, 2025, effective January 1st, 2026, taxes the lowest band of personal income at zero rate. Small companies are also taxed at zero rate. Taxation of bands of personal income will be progressive until the highest band. The design appears to be that beneficiaries will have more disposable incomes that will trigger more consumption, and consequently increased production.

I will dwell more on specific sectoral incentives such as;

- (a) Export processing and free trade zone tax incentives; and
- (b) Economic development tax incentives (EDTI).

However, other tax incentives of general nature are highlighted.

3.2.2 Tax incentives of general nature;

- (a) tax exemption is granted to any non-resident employee whose employer is a start-up or is engaged in technology-driven services;
- (b) expenditure incurred on research and development (R&D) is deductible up to a tune not exceeding five per cent of turnover;
- (c) Gains on the disposal of shares within a threshold, subject to conditions president, are tax exempt.

However, notwithstanding the threshold, if the gains are reinvested, as prescribed, no tax will be imposed;

- (a) In addition to EDTI tax-free period of five years, with the possibility of extension for another final period of five years, investors on gas production will be granted an additional tax-free period of five years at the expiration of the EDTI period. By implication investment in gas production may attract a total of fifteen-year tax -free period. Also, there are incentives for the utilization of nature gas; and
- (b) A myriad of other general tax incentives are contained in the schedules to the Nigeria Tax Act, 2025.

3.3 Specific tax incentives

3.3.1 Export Processing Zone (EPZ) and Free Trade Zone (FTZ) Tax Incentives;

The EPZ is an industrial estate fenced-in for the production of manufactured goods for export^{xxi}. It is outside the custom territory and is therefore free from import duties. The zone is administered by Nigeria

Export Processing Zone Authority. FTZ is a specialized type of EPZ that works to enhance industrial manufacturing.

3.3.1.1 Highlights about the EPZ;

- (a) it has the objectives of attracting DFI;
- (b) it enhances employment; transfer of technology, and facilitates increase in local content of manufactured goods;
- (c) 100 per cent ownership of business is permitted in the EPZ;
- (d) Up to 25 per cent of goods manufactured in the EPZ may be exported into the Nigeria custom territory, while the rest are exported to other countries, so as to earn foreign currencies;
- (e) The EPZ is made attractive for investors by ways of good infrastructure, liberal regulations and a moratorium of ten years free of strikes and lock-outs;
- (f) The EPZ is prohibited from sourcing for foreign exchange from the domestic market^{xxii};
- (g) Profits of the EPZ entity are fully exempt from tax^{xxiii}.

3.3.2 Objectives of EDTI;

EDTI is a replacement of pioneer tax holiday regime It created priority sectors and products. Amongst the objective of EDTI that I find apt are;

- (a) Attracting foreign investment. This has the potential for forward and backward integrations that produce taxable incomes; and
- (b) Employment generation: Taxes will be paid by employees.

3.3.2.1 Highpoints of administration of EDTI

- (a) approval is granted on the bases of priority sectors and priority products There must be a permissible by-product The by-product is taxable;
- (b) EDTI period is five years. It is renewable for another five years only if 100 per cent of profits are reinvested;
- (c) there are certifications for pre-production day qualifying capital expenditure and of profits and losses;
- (d) information must be rendered on local production and local prices. And of comparative prices of imported equivalents;
- (e) tax returns must be rendered. Separate reports and books must be maintained for non-priority business; and
- (f) export oriented companies outside the FTZ are entitled to three years tax exemption.

Strict tax compliance and enforcement of the above will bring in additional taxes and expand the tax base.

4. CONCLUSION

The figures in chapter two, especially 2.1.3 show that Nigeria has far exceeded its debt-service ratios, well above 22.5 per cent recommended by the World Bank. Other indicators are not cheering. Therefore, the debt-financing option should be drastically reduced in order to avoid the tipping point.

On the side of tax incentives, while taxes foregone are expected to be reinvested for a geometric increase in tax yield in future. What is required is a controllable success factor of improved tax enforcement and extra scrutiny verifications. In the present, employments are being generated. The cumulative investment in the EPZ as at end of 2024 was N14.1 trillion (\$30 billion)^{xxiv}. Even within the tax-exempt period, non-tax-exempt consequential transactions are yielding taxes. This in addition to employment, transfer of technology and increase in local content. These offer more compensation than the possibility of falling off the cliff, represented by debt-financing.

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WORKING WITH REFERENCE GROUPS - A CLIENT-CENTRED APPROACH

Dr John S. Potter*

The 1960s was a rich time of social development for those of us who were engaged in providing technical assistance to farmers. Quite independently, extension officers around the world started asking questions about the quality of their work and the conclusions they came to, and the methods they developed, were remarkably similar. It came to be known as **the client-centred approach**, a three-step process:

1. Farming reference groups are identified – a group of individuals who in their daily occupation tend to refer to members of their group rather than outsiders when they need advice (English & English 1958).
2. Involvement strategies are developed – not all farmer groups had an established relationship with the extension service.
3. Reference groups are helped to become competent in meeting their own needs.

IDENTIFYING REFERENCE GROUPS

Some centres of the rural population in South Australia where I worked as an extension officer for nine years (1958-1966) had developed branches of an organisation specifically designed to accommodate regular contact with extension officers from the Department of Agriculture. It was established in 1888 by a man called Albert Molineux and was called the Agricultural Bureau. In 1929 a Country Women's Association (CWA) was formed to support country women. These were obvious connection points for those of us charged with providing technical assistance to farming communities. But there were many communities that did not have a Bureau or a CWA. Such was my experience when I was appointed the Soil Conservation Officer for an area of land in South Australia called the Murray Mallee. The word 'Murray' was taken from the River Murray which had a right-angle bend at Morgan and formed the north and western boundaries of the region. The eastern boundary was the State border with Victoria, and the southern boundary was the Murray Bridge to Pinnaroo railway line.

The name 'Mallee' was derived from the dense, 4-5m high Eucalyptus species scrub that covered the area prior to settlement. A 'Mallee tree' has a large lignotuber underground from which several stems grow – see photo.

The land in the Mallee is typically low parallel E-W sand hills interspersed by sandy loam flats. The annual rainfall is low - 250-300mm. Production of cereal crops, wheat and barley, is possible because the soil is

sandy and crops only need 150mm of rain to fall at the right time of the year to produce a moderate yield. Land is cropped every three years. In the in-between years, the land is grazed by sheep.



Mallee Scrub

The farming practices initially introduced to the area were learned in England and included fallowing; land due to be cropped was ploughed in early spring the year before and left exposed over the summer months. Spring winds are strong in the Mallee; by 1945, about one quarter of the land in the area was drifting sand. Fences were covered, and sand was regularly moving onto public roads. Farms became sub-economic; many families lost their farm and their livelihood.

In the 1950s, the South Australian Department of Agriculture set up a Research Centre in the Mallee to develop cultural practices that would better handle the conditions. Drifting sand was brought under control by seeding cereal rye (*Secale cereale*) with sulphate of ammonia. In pasture years, a nitrogen fixing pasture legume called Harbinger Medic, a cultivar of Strand Medic (*Medicago littoralis*), was found to do well, providing phosphate fertilizer was applied. My job was to sell this prescription to the Mallee farmers.

A Field Day

Immediately south of Loxton, a town on the River Murray, was a uniform area of land, divided by a main road running N-S. In 1960, Research Centre staff had planted a demonstration plot of legumes, including Harbinger Medic, in the eastern half of this area. In 1962, I decided to hold a field day for farmers at the demonstration site where we could discuss drift control and the use of Harbinger medic in the cropping rotation. It was not difficult to advertise the field day to the farmers who lived on this land type - the area had two local newspapers and a radio station which were happy to assist me in my work; Attendance at the field day was:

- Farmers from the east of the main road 80%.
- Farmers to the west of the road 0%.

Why was this?

Investigation

To assist me in my work, I had the benefit of a Soil Conservation Board consisting of seven farmers representing the whole of the Mallee. I took my problem to them and was told that while the land type was the same, farmers from the west of the main road were **a different community** from those in the east. The plots were located in the east, so farmers to the west would not consider them relevant for them. If I wished to talk with the farmers from the west I would have to hold a field day in **their area**.

The Mallee is relatively flat with no distinguishing geographical features. The boundaries of communities, if such existed, were not apparent. There were a few small townships, but much of the area had no township structure apart from an occasional small hall. How was I to determine where the community boundaries were located?

Each Board Member represented a particular part of the Mallee and within that portion he had a Local Committee to assist him. I arranged a series of meetings with each Member and their Committee and took to those meetings maps showing the boundaries of farming sections. When tasked with the job of drawing community boundaries, each Committee drew them with competent ease. Significantly, the boundaries each committee drew were congruent with the boundary drawn by their neighbouring committee. I now had a map of the Mallee with the communities identified. The next year, 1963, I established demonstration plots in each community and held field days in the spring. The attendance was high in all communities, and the plots were impressive due to exceptional rainfall. The impact on the farming communities was massive, opening the door for much useful work in the years that followed.

International Experience

In 1969, I was granted funds to visit extension services in the USA, Canada, England, Eire, Holland and Italy. I discovered that extension officers in those countries recognised and worked with reference groups as a normal part of their operation.

In the USA and Canada, extension services are based on counties, but within each county, officers recognise discrete communities. Over time, various community organisations have arisen. In Washinton State and Idaho, the most powerful is the Grange while the Sunshine Club caters for women's social needs. In Illinois I discovered the Farm Bureaux. These organisations were originally set up by farmers to connect them with educational institutions but soon developed a cooperative buying function.

In England and Eire, district extension services recognise and work with Parishes, clearly defined, tight knit farmer groups with a church, store and/or public house. In Holland the Advisory Service is based on well-defined communities called Gemeente. In Italy, the basic unit of local government is the Commune, within which are a number of Frazione, reference groups in every sense of the word.

This trip confirmed for me that efficient extension services have a reference group focus.

AN INVOLVEMENT STRATEGY

The identification of reference groups in the Murray Mallee had come about through an established connection with the farming community through the Board and Local Committee. My colleagues and I asked how we might connect with groups where there was no prior involvement with extension service personnel.

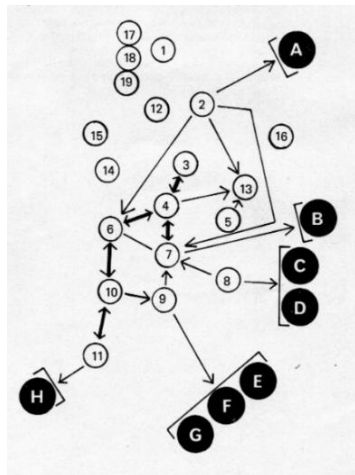
In the hills behind Adelaide City farmers were located in isolated valleys. One such was Pine Creek Valley. We decided to see if we could devise a way to connect with the farmers in this valley; to test whether they were a reference group and discover whether they had any need for technical advice. We appointed one of our colleagues, who had outstanding communication skills, to be the contact person and designed and executed the following strategy:

Step 1: Consult Informed Persons: At the entrance to the valley was a Post Office and a small hall. We consulted with the Post-Master, and he gave us the names of the farmers in the valley and helped us note their location on a map.

Step 2: Farm Visit: Our agent visited each farm, explaining that he was from the Agriculture Department and charged to find out what technical advice might be of interest to farmers in the valley. To test the reference characteristic he also asked each farmer: 'of the farmers you know with whom do you meet regularly'*. He concluded his visit by inviting each farmer to attend a meeting to be arranged at the local hall. Having obtained mostly positive responses, we set a date for a meeting and issued invitations, through the Post-Master.

[*This information allowed us to develop a sociometric diagram – see below. This showed mixed results. Eleven farmers (58%) showed a strong reference characteristic and a strong pattern of reciprocal choice between famers 3, 4, 6, 7, 10 and 11, with farmers 4, 6, 7 and 10 appearing to provide some leadership. But nine farmers were isolates.]

Step 3: The Meeting: The attendance at the meeting was 14 farmers, 74% of those in the valley.



Sociometric Diagram for Pine-Creek Valley

The program we set was to conduct a **Problem Census**, a technique devised by Joan Tully (1966). This proceeded as follows:

- When the farmers arrived, they were given a piece of paper and a pen. When all were assembled, the officer said: 'We are interested in assisting you with problems you have on your farms, please write down some matters of concern you have.'
- After ten minutes, the officer said: 'Please get into groups of three or four, share the problems you have written down and see if you can come up with a short list of problems that you think are the most important; and please appoint a reporter, so that we can put your ideas on the white board.' After the groups were formed, the officer consulted with each group to ensure that a reporter had been appointed.
- After fifteen minutes, the meeting was called back to plenary session. The reporters called out their answers in turn, and eight problems were listed on the white board.
- Then the question was put: 'Which of these problems listed do you think is the one we should start to work on?' We were aware that this whole process was challenging for the group and were not surprised that they sat a bit stunned for a considerable time, but the officer made them sit it out. After a while, a person we call a 'socio-emotional leader', some-one who is unable to stand social pressure, blurted out, 'I think cockchafer beetle is the most important problem.' The farmers, who by this stage were getting a little desperate to get out of the meeting, cried out as one man: 'Yes. Cockchafer is the problem'.
- The officer said, 'We are not familiar with your cockchafer problem. Can I visit your farms again and bring an entomologist with me?' The farmers quickly agreed, and the meeting was closed and the farmers fled.

Step 4: A Second Farm Visit: The second farm visit was duly undertaken. Cockchafer beetle is a beetle that chews the roots of pasture plants in the late spring. There was evidence of pasture damage when we visited the farms. On enquiry, we found that the way that farmers treated the beetle was to spray the whole of their farm lavishly with a chemical called Dieldrin in September each year.

Step 5: Investigation: We were concerned that Dieldrin might be getting into the milk, so we consulted with the cheese factory where the farmers sold their milk to see if there was any evidence of this. The problem of Dieldrin in the milk was not only confirmed; we learned that the factory had been advised that their cheese was about to be refused by the Japanese market into which it was being sold because of Dieldrin in the cheese.

Step 6: Report to Second Meeting: Our agent arranged a second farmer meeting for him to report on his farm visit findings. He brought with him an entomologist from the Department. The news that their milk might be rejected if something was not done to reduce Dieldrin applications provided the opportunity needed for the entomologist to share on the beetle's lifestyle and suggest practices which would solve the export problem.

Step 7: Farm Action Phase: The news that their milk might be rejected led to uniform action to introduce better cockchafer treatment.

Step 8: Group Cohesion: In less than one year, this group of farmers became **unified and highly active**. They set up regular meetings to develop community-based action to address other problems in their farming operations.

WORKING WITH MATURE GROUPS

Batten (1967) in the United Kingdom, produced a model which facilitates client-centred inter-action with mature groups – see below. It is an adaption of the generic rational/purposive agency model. We used this model as a standard technique in the years that followed.

Field workers in the new discipline of client centered technical assistance became known as 'change agents'. The objective adopted by change agents was: 'Get the group moving so well that one day you can sneak out the back door and not be missed'. I had the privilege of doing this on a numerous occasions in Australia and Central Africa over the next forty years.

THE NON-DIRECTIVE SOCIAL ACTION MODEL after Batten T.R. 1967

Members of the Group

1. Vaguely dissatisfied but passive
2. Now aware of certain needs
3. Now aware of wanting changes of some specific kind.
4. Decided, for or against, trying to meet some want for themselves.
5. Plan what to do and how they will do it.
6. Act according to their plan
7. Evaluation

The Change Agent (by asking questions)

- Stimulates people to think why they are dissatisfied and with what.
- Stimulates people to think about what specific changes would result in these needs being met.
- Stimulates people to consider what they might do to bring about such changes by taking action themselves.
- If necessary, stimulates people to consider how best they can organise themselves to do what they now want to do.
- Stimulates people to consider and decide in detail just what to do, who will do it, and when, and how they will do it.
- Stimulates people to think through any unforeseen difficulties or problems they may encounter in the course of what they do.
- Satisfied with the result of what they have done? If not return to Step 1.

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THE EVOLUTION AND QUALITATIVE SPOTLIGHT ON KAIZEN

Dr Douglas Mapingire*

Abstract Purpose–

Since Masaaki Imai introduced Kaizen in the mid-1980s, it has played a significant role in Japanese business competitiveness. Despite its definition, literature on Kaizen often remains ambiguous and inconsistent. Further theoretical development in operations/manufacturing management is needed. This paper reviews academic and practitioner discussions of Kaizen to clarify its meaning and advance its theoretical foundation.

Design/Methodology/Approach–

A literature review on Kaizen was conducted by searching multiple databases and consulting relevant books. The collected literature was systematically analysed and categorized.

Findings–

The study finds that Kaizen is currently represented through three main perspectives, each with its own principles and techniques. Comparing these perspectives reveals key guiding principles for Kaizen.

Research Limitations/Implications–

Analysis and classification rely on reviewed literature, author expertise, and may consider additional features and perspectives.

Practical Implications–

The available literature on Kaizen is limited. This paper reviews several relevant articles and research, resulting in an initial classification of Kaizen and four main topics, which could aid managers implementing Kaizen in their organizations.

Originality/Value–

This paper is among the few to review literature to clarify Kaizen in both academic and practitioner contexts.

Keywords–

Kaizen, Continuous improvement, Guiding principles, Operations/Manufacturing management, Literature review.

Paper Type–

Conceptual paper.

Introduction

Since Masaaki Imai introduced "Kaizen" in his 1986 book, the concept has become central to Japanese management, widely credited for the competitiveness of Japanese companies from the late twentieth century (Imai, 1986; Brunet, 2000). Over the past few decades, Kaizen has been applied either through staff-driven improvement initiatives, as a set of waste-reduction tools, or as an analogue to Western practices like Total Quality Management (TQM) or in its Japanese forms, Company Wide Quality Control (CWQC), Lean Manufacturing and the Toyota Production System (TPS). Its significance is reflected in management efforts to cut costs, enhance customer satisfaction, boost quality, and speed up innovation (Jusko, 2004; Koltzenburg, 2004). Fujio Cho, Chairman of Toyota, emphasized the need to intentionally foster Kaizen culture in new locations (Kissoon, 2010). Despite Imai's initial definition, academic and practitioner interpretations of Kaizen remain inconsistent (Singh and Singh, 2009). This paper reviews these varied definitions and research, aiming to clarify key principles and provide guidance for future studies in Operations/Manufacturing management.

Definition of Kaizen

Kaizen, a Japanese term meaning "improvement," is defined by Imai (1986, 1997) yet remains insufficiently detailed in its theoretical exposition. Multiple scholars have approached Kaizen from varied perspectives. According to Imai (1989, p. 23), Kaizen refers to ongoing improvement in personal, domestic, social, and professional realms. Within organizational contexts, it encompasses continuous advancement involving all stakeholders, including both management and workforce. Newitt (1996) attributes Imai's definition of Kaizen to two Japanese Kanji: KAI (change) and ZEN (good/improvement) and notes its association with "continuous improvement" principles (Lillrank & Kano, 1989, p. 28). This interpretation situates Kaizen as a strategy for enhancing staff engagement in process development (Elgar & Smith, 1994), highlighting Bessant's (2003) assertion that mobilising personnel fosters constructive contributions toward corporate objectives.

The concept also resonates with early human relations theories, drawing parallels to the works of Mayo, Maslow, McGregor, and Herzberg (Malloch, 1997). For the Japanese, as noted by the Japan Human Relations Association (1990), Kaizen symbolises practical responses to everyday challenges faced by

employees. It has been interpreted as an ethical force motivating individuals to address daily issues and recognise the value of their work (Styhre, 2001). Some theorists further conceptualise Kaizen as a comprehensive life philosophy extending to personal and family domains (Imai, 1986; Wittenberg, 1994; Gondhalekar et al., 1995). The notion of reconciling individual values with environmental factors has led certain authors to draw connections to Confucian philosophy, which emphasises harmony between individuals and nature (Bodek, 2002; Imai, 2006). Thus, Kaizen can be viewed as a principle fostering cooperation and societal improvement (Brunet, 2000; Gondhalekar et al., 1995).

Empirical research demonstrates a broad spectrum of interpretations and applications of Kaizen within Japanese enterprises, influenced by each organization's characteristics. Brunet and New (2003, p. 1428) describe Kaizen as "a host of continuous activities in which those involved play specific roles for identifying and ensuring improvements that contribute to corporate goals." Imai (1986) originally proposed that the Kaizen business strategy requires full organizational participation in improvement processes without significant capital investment. In a 2007 interview, Imai reaffirmed Kaizen as daily, company-wide continuous enhancement regardless of individual roles, encompassing incremental advancements and radical innovation. Western literature echoes this perspective, with Hamel (2009) defining Kaizen as a philosophy and critical tool for strategic and process improvement initiatives.

Empirical findings also indicate a causal relationship between quality and innovation performance (Prajogo & Sohal, 2003, p. 912). Rother (2009) and Ortíz (2009) demonstrate that both process redesign innovations and incremental improvements are complementary within Toyota's methodologies. The synergy between these approaches is illustrated by issues such as the Toyota Prius brake problem, attributed to software errors requiring radical innovation (Dahlgard-Park, 2011, p. 505). Taichi Ohno's principles at Toyota further advocate for continuous awareness of Kaizen among all employees (Suárez-Barraza, 2007). The Japanese Union for Scientists and Engineers regards Kaizen as axiomatic, underpinning other concepts without extensive definition (Bhuiyan & Baghel, 2005). There is consensus among researchers that the meaning of Kaizen evolves, varying by context and era (Tozawa & Bodek, 2002).

Finally, some scholars posit that Kaizen or Continuous Improvement forms a fundamental component of Total Quality Management (TQM) (Crosby, 1979; Ishikawa, 1986; Deming, 1986; Garvin, 1987; Juran, 1990; Feigenbaum, 1991; Dean & Bowen, 1994; Oakland, 1999; Hellsten & Klefsjo, 2000) and underpins Lean manufacturing systems, where teams address operational challenges through methods such as 5S and standardisation (Womack et al., 1990; Ho & Citmill, 1996; Liker, 2004; Spear, 2004; Hino, 2006; Shingo,

2007). Comparative studies of Western and Japanese approaches have sought to identify conceptual commonalities and distinctions (Magaña-Campos & Aspinwall, 2003).

The Japanese Perspective of Kaizen

There is a noticeable paucity of scholarly literature specifically examining the Japanese variant of Kaizen. Nonetheless, several articles discuss its practical applications and case studies. For instance, an article in *Strategic Direction* (2004, p.23) observes that research on this subject is nearly absent, with only Brunet and New (2003) from the Said Business School at Oxford cited as references. Among the few quantitative studies available, Cheser's (1998) work assessed the impact of Kaizen on staff within Japanese manufacturing plants, revealing a significant increase in employee motivation during the initial six months following the implementation of the Toyota Production System (TPS). Cheser also highlighted the need for further academic inquiry into the topic. A similar empirical investigation by Brunet and New (2003), which examined 11 leading Japanese steel and automotive companies, found considerable diversity in the application of Kaizen across organizations, although certain core principles—particularly regarding the integration of Kaizen into management systems—were widely shared.

Aoki (2008) supports the notion that Kaizen can be effectively transferred to organizations outside Japan, provided that the fundamental principles are upheld: employee-driven improvement initiatives, cross-functional communication, employee discipline, and standardized work processes designed to eliminate waste ("Muda"). In conceptual discussions, Cheser (1994) posits that Kaizen extends beyond Western Continuous Improvement (CI), though it shares key underlying principles. Imai (1986, 1989) categorizes Kaizen into three forms: Kaizen management (encompassing broad organizational strategy and systemic integration), group Kaizen (team-based problem solving such as quality circles), and individual Kaizen (employee-generated improvements from the shop floor level). According to Imai, managers are responsible for radical innovations, middle management for operational improvements, and workers for maintaining process standards. Key elements of Kaizen implementation include a focus on processes over results, continual monitoring of PDCA (Plan-Do-Check-Act) and SDCA (Standardise-Do-Check-Act) cycles, rewarding quality outcomes, leveraging statistical control, and recognizing subsequent processes as internal customers. Berger (1997), building on Imai's framework, highlights three guiding principles for Kaizen: process orientation, ongoing standard maintenance and improvement, and individualized suggestions for continuous improvement. Berger also provides a classification system for Kaizen-related teams, including quality control circles and wider CI groups.

The Western Perspective of Kaizen

In the literature, the Western approach to Kaizen is commonly referred to as Continuous Improvement (CI). However, there is a recognized need to deepen the theoretical foundation of this concept (Savolainen, 1999; Bhuiyan and Baghel, 2005), as CI is often understood as a component within broader frameworks such as Total Quality Management (TQM), Lean Manufacturing, or TPS. Noteworthy contributions to the understanding of CI include the work of Schroeder and Robinson (1991), who traced its origins to U.S. government initiatives in the mid-20th century aimed at boosting industrial productivity, and Lindberg and Berger (1997), whose research on Swedish firms revealed that CI is integrated into daily operations rather than implemented through parallel structures.

The Brighton University “CI Research for Competitive Advantage” team developed a high involvement innovation model to assess effective CI implementation (Caffyn, 1999). Bessant and Caffyn (1997), and later Bessant (2003), proposed a five-level developmental model of CI capability in organizations, asserting that sustained CI requires evolving behavioural competencies throughout the company. Caffyn (1999) defined CI capability as the organization’s ability to extend innovation broadly among employees to secure competitive advantage.

The Western interpretation of Kaizen emphasizes practical managerial tools and methods for eliminating non-value-adding activities (*muda*). Methodologies such as Kaizen Blitz, Gemba-Kaizen workshops, Kaizen Office, and Kaizen Teian have been identified as integral tools. The relationship between Kaizen and Lean Six Sigma has become a focal area in recent Western literature. Dahlgard and Dahlgard-Park (2006) compared the philosophies of Lean production and Six Sigma, concluding that both stem from Japanese TQM practices and share foundational principles. Teresco (2008) describes how U.S. manufacturers typically implement either Lean-Kaizen or Six Sigma separately, with Lean focusing on waste reduction and Six Sigma emphasizing variation reduction through structured project management techniques such as DMAIC. King (2009) and Ramakrishnan and Testani (2010) highlight the potential for synergy between Kaizen events and Six Sigma projects, noting that grassroots Kaizen initiatives are crucial in sustaining Lean-Six Sigma transformations. Conversely, Schroeder et al. (2007) point out that Six Sigma maintains distinct characteristics in its deployment and organizational structure. Kumar and Antony (2008) further examine differences in quality management practices between SMEs that have adopted Six Sigma (including Lean-Kaizen) and those adhering to ISO standards in the UK manufacturing sector.

Three Perspectives of Kaizen

Having conducted an analysis of the literature on Kaizen, the writer proposes three perspectives for understanding the concept: (1) Kaizen as a theoretical principle for improvement methodologies and techniques. (2) Kaizen as a “management philosophy”; (3) Kaizen as a component of TQM;

Perspective 1:

Kaizen serves as a theoretical foundation for various improvement methodologies, such as Kaizen Blitz, Gemba-Kaizen, Office Kaizen, Kaizen Teian, and Lean-Kaizen Six Sigma. These approaches focus on eliminating waste, reducing lead time, optimising just-in-time delivery, and improving cash flow, often through short-term workshops to quickly generate staff-driven improvement ideas. The cross-functional nature of Kaizen ensures broad waste reduction, with experienced employees leading projects and committees overseeing implementation. While some methods like Kaizen Office and Kaizen Teian address organisational strategy and performance, most maintain an operational focus, aiming to enhance process quality through active worker participation.

Perspective 2:

Kaizen is widely regarded as an overarching management philosophy based on a set of principles and values that shape company leadership. This viewpoint encompasses Japanese-influenced management practices, methods, and tools, often associated with Company Wide Quality Control (CWQC) (Imai, 1989, p. 40). Many experts believe Kaizen as a management philosophy evolved from the quality control methods developed by Japanese manufacturers in the 1960s and 1970s, shaped notably by figures like Ishikawa, Mizuno, Shingo, Miyauchi, and Ohno (Sawada, 1995). Research indicates that high-performing Japanese companies commonly adopt this approach to Kaizen (Cheser, 1998; Brunet, 2000; Brunet and New, 2003; Liker, 2004; Hino, 2006).

Similarly, other scholars view Kaizen as the foundation for corporate values and culture, pointing to firms like Toyota Motor Company and its “Toyota Way 2001” model (Hino, 2006, p. 82). Liker (2004, p. 306) discusses how organizations can apply these management principles, emphasizing Toyota’s ability to adjust its culture to different local environments. According to literature, Kaizen represents ongoing efforts to maintain and elevate work standards within company management. Imai (1986, p. 74) argues that Kaizen depends on standardization; incremental improvements are only possible when consistent standards are established and followed routinely. In practice, this means every employee is expected to meet required standards, making compliance central to management—a perspective that interprets work discipline through Kaizen (Imai, 1986).

Key elements of this philosophy include standardization, order, discipline, and waste reduction (Imai, 1997; Brunet and New, 2003). Maintenance and enhancement of standards rely on everyone's participation: companies promote group improvement activities (group Kaizen) and encourage individual suggestions (individual Kaizen). The philosophy is considered intrinsic (Berger, 1997), shaped by employees' own initiative (Lillrank and Kano, 1989). The concept of "zero defects" motivates workers to continually and spontaneously look for ways to improve processes (Brunet and New, 2003). Improvements to shop floor operations (Gemba) come from disciplined, constant staff engagement, focusing on identifying and reducing waste, testing new ideas in controlled settings.

Various methods support the maintenance and enhancement of standards; all closely tied to Kaizen's core principles. A strong relationship between senior management and staff underpins the philosophy, expressed through policies and goals extending from top executives to shop floor workers—a connection known as Hoshin Kanri in Japanese (Policy or Strategic deployment in the West).

Perspective 3:

Kaizen is often regarded as an integral part of Total Quality Management (TQM). Improvement programs in Western countries have roots in US "Training Within Industry" initiatives during WWII, which emphasized process control and continuous improvement. These concepts were later introduced to Japan by experts like Deming and Juran. Deming's principles identify continual improvement as central to TQM, while Juran views it as one phase of his "quality trilogy." Although debate persists around TQM's elements, studies show strong correlations between continuous improvement (CI) and TQM, along with client orientation and teamwork. Kaizen is seen as a core component of TQM, driving organizations to consistently review and enhance their technical and administrative processes using techniques such as statistical control and flow diagrams. Some authors also position CI as key for broader management systems or corporate capability, whether within TQM or other improvement models.

Themes for Future Research and Conclusions

The three perspectives discussed in this paper offer an initial framework for understanding Kaizen. Of course, other categories could be established depending on one's analytical approach. The writer acknowledges the difficulty in making clear theoretical and analytical distinctions between the viewpoints presented, as some principles and techniques fit under more than one category. This overlap may stem from Kaizen's evolution over time, both academically and in practice. Additionally, these principles and methods might have developed due to varying interpretations or approaches, particularly those adopted by Western countries (Brunet and New, 2003). As mentioned, Imai (1986)

and Berger (1997) each suggested links between different Kaizen approaches. Nevertheless, the writer's analysis is distinct, drawing upon previous authors' work. The writer hopes his findings will encourage meaningful discussion about a topic that has seen limited academic attention. To conclude, the writer highlights several themes that emerged in his research, which may guide future studies—both theoretical and practical.

(i) Clarifying the Kaizen Concept

There is ongoing debate over the meaning of Kaizen, even within Japanese firms. Managers often adapt core principles to their needs, leading to confusion and inconsistent results, especially in Western contexts. Effective transfer of Kaizen requires clear definitions before implementation (Lillrank, 1995). Despite continued research, more work is needed to define Kaizen's nature and scope. Clearer understanding is essential for practical application and avoiding repeated mistakes.

(ii) Kaizen in Business Applications

Various Kaizen methodologies exist—such as Kaizen Blitz, Gemba-Kaizen workshops, Lean-Kaizen Six Sigma, and TQM—but many overlook core management philosophy principles. Companies often find only rigid methods rather than integrated guidance, underscoring the need for foundational Kaizen principles that are adaptable in different contexts. As daily improvement becomes more crucial, especially amid external pressures, further research is needed to identify critical success factors for effective Kaizen implementation, similar to challenges faced with TQM.

(iii) Corporate Diversity and Kaizen Application

Research shows that Kaizen is mostly studied in large corporations, multinationals, and some suppliers (in Japan and the West) (Tanner and Roncarti, 1994; Malloch, 1997; Cheser, 1998; Brunet and New, 2003), with little information available on small and medium-sized enterprises (SMEs)—an area needing more exploration. Imai (2007) shared successful Kaizen adoption in a mid-sized Indian firm. There is also interest in how major companies apply Kaizen across departments and processes, and whether the approach is adopted comprehensively or selectively. Montabon (2005) examined Kaizen's first perspective in services, enriching research by distinguishing between manufacturing and service applications. Other researchers are examining Kaizen's role in the public sector (Suárez-Barraza and Ramis-Pujol, 2008; Suárez-Barraza et al., 2009).

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MATERIALS MANAGEMENT AND QUALITY MANAGEMENT IN CAMEROON: HISTORICAL EVOLUTION, CURRENT PRACTICES, AND FUTURE PROSPECTS

Professor Dr Daniel Tata*

Abstract and Introduction

Materials management and quality management are critical for organizational efficiency and economic development globally. In Cameroon, these management functions have evolved through unique historical, economic, and institutional influences. This summary explores their evolution, the impact of integrating quality management systems, and the challenges and opportunities faced by key sectors such as agriculture, oil and gas, and manufacturing.

The evolution of quality materials management began in the early 20th century with foundational work in statistical process control and advanced significantly through TQM (Total Quality Management) in the mid-1900s, spearheaded by figures like Deming and Juran. These concepts were quickly adopted by Japanese industries, setting global standards that eventually influenced Cameroonian practices. Over time, organizations worldwide, including those in Cameroon, have embraced tools like Six Sigma and ISO standards to enhance efficiency and customer satisfaction. Nonetheless, the adaptation of these practices in Cameroon is shaped by local realities, including resource constraints and historical legacies.

Historical Context and Evolution in Cameroon

Cameroon, dubbed “Africa in miniature” due to its economic diversity, has undergone a complex evolution in materials and quality management. Under colonial rule, materials management was rudimentary, aimed mainly at resource extraction for export, with little emphasis on local capacity or integrated systems. Post-independence, Cameroon saw attempts at state-led industrialization, the creation of parastatals, and the gradual introduction of more formalized materials management systems, often driven by international partnerships.

The economic crisis of the 1980s and subsequent structural adjustment programs marked a shift towards privatization, market-driven reforms, and the adoption of modern materials management practices. International organizations such as the World Bank and UNIDO played a pivotal role by funding initiatives to improve procurement, inventory control, and supply chain integration, and by promoting global standards such as ISO 9001.

Sectoral case studies highlight this evolution:

- **Agriculture:** Entities like the Cameroon Development Corporation (CDC) and SOCAPALM have modernized their materials management systems, prioritizing supplier relationships, quality, and storage optimization. SODECOTON exemplifies efforts to manage logistics for export efficiently.
- **Oil and Gas:** Firms such as SONARA and SNH have adopted advanced procurement and quality control methodologies, often in partnership with multinational organizations.
- **Manufacturing and SMEs:** While large companies have made strides in modernization, SMEs face ongoing challenges related to infrastructure, financing, and technology.

Literature Review and Theoretical Frameworks

Globally, materials management emerged as a distinct discipline in the early 1900s, gaining momentum with mass production and the scientific management movement. The literature emphasizes efficiency, inventory control, and the integration of supply chain and quality management, especially in the context of globalization and JIT philosophies.

Quality management theory developed alongside materials management, with Deming’s System of Profound Knowledge and Juran’s Quality Trilogy providing foundational frameworks. Crosby’s Zero Defects theory further emphasized prevention over inspection. The central theme across these approaches is a holistic, continuous improvement culture embedded in all organizational processes.

In Africa, colonial histories, weak infrastructures, and dominant informal economies have posed challenges. However, globalization and international standards have driven improvements. Cameroonian literature on these topics, though growing, reveals gaps in historical analysis, benchmarking against global standards, and the study of institutional reforms.

Material Quality Management Practices in Cameroon

The adoption of Material Quality Management Systems (MQMS) in Cameroon has been gradual. Export-oriented companies and large enterprises have

pioneered the implementation of recognized standards, particularly ISO 9001, as a means of accessing international markets and ensuring consumer protection. The government, through agencies like ANOR, has supported these efforts, while private sector associations and NGOs have provided advocacy and capacity building.

Despite these advances, widespread adoption is hindered by several factors:

- **Resource Constraints:** SMEs especially struggle to fund training, certification, and process improvements.
- **Cultural Resistance:** Limited awareness, resistance to change, and lack of management commitment impede adoption.
- **Infrastructure and Technology:** Poor infrastructure and limited technology access reduce effectiveness.
- **Regulatory Weaknesses:** Inconsistent enforcement and regulatory gaps undermine quality efforts.

Nevertheless, organizations that have invested in MQMS report tangible benefits: improved product quality, operational efficiency, enhanced market access, and stronger reputations. For instance, CDC's ISO 9001 certification has enabled entry into new markets, and Boissons du Cameroun's rigorous quality management supports both consumer satisfaction and regulatory compliance.

Comparative Analysis with Global Best Practices

Cameroon's leading firms have made progress in aligning with international best practices, but significant gaps remain when compared to high-performing economies. Globally, materials management is characterized by advanced information systems, integrated supply chains, and a deep-rooted culture of continuous improvement supported by robust training and metrics.

Key lessons from global comparisons include:

- **Leadership Commitment:** Organizational success in both materials and quality management hinges on sustained top management support.
- **Investment in People and Technology:** Capacity building and technological upgrades are crucial.
- **Continuous Improvement:** Embedding improvement into organizational culture is vital for adaptability.
- **Collaboration:** Close partnerships with suppliers, customers, and regulators enhance effectiveness.

However, in Cameroon, diffusion of best practices is limited outside leading firms, especially among SMEs and public sector organizations.

Impact, Challenges, and Opportunities

The evolution of materials and quality management has contributed to cost reduction, productivity gains, and improved competitiveness for Cameroon's key sectors. The benefits are most pronounced in export-oriented industries, which have also experienced job creation and technological upgrading.

However, challenges persist:

- **Resource and Skill Gaps:** Many firms lack the financial and human capital to implement advanced practices.
- **Infrastructure Deficits:** Unreliable supply chains and limited access to modern equipment hinder progress.
- **Regulatory Weaknesses and Corruption:** Inconsistently enforced standards and bureaucratic inefficiencies undermine long-term change.

Opportunities for improvement include leveraging regional economic integration, digital transformation, and increased demand for quality in both domestic and export markets.

Policy and Managerial Implications

- **For Policymakers:** Focus on creating an enabling environment through investments in infrastructure, education, and regulatory reform. Support access to finance for SMEs and build robust frameworks for quality enforcement.
- **For Business Leaders:** Foster continuous improvement, invest in training and technology, and pursue recognized quality certifications. Deepen employee involvement and establish transparent, integrated quality monitoring frameworks.
- **For Researchers:** Address gaps in sector-specific challenges, digitalization's impact, and the influence of international partnerships.

Recommendations and Future Research

Recommendations for Stakeholders:

- **Policymakers:** Invest in infrastructure and regulatory reforms to support quality management.
- **Business Leaders:** Prioritize continuous improvement, employee involvement, and transparency in quality initiatives.
- **Researchers:** Conduct studies on digitalization, barriers to quality standard adoption, capacity building, sustainability practices, and successful case studies.

Future Research Directions:

1. **Digital Transformation:** Explore the role of ERP, IoT, and supply chain software in improving transparency and efficiency.

2. **Barriers to Quality Standards:** Investigate obstacles such as financial constraints, lack of awareness, and skills deficits, and develop strategies to address them.
3. **Training and Capacity Building:** Assess current knowledge and propose frameworks for effective skills development.
4. **Sustainability Integration:** Study ways to integrate sustainable practices into materials management and their impacts.
5. **Case Study Documentation:** Analyze organizations that have successfully implemented MQMS.
6. **Policy and Regulatory Analysis:** Recommend improvements for wider adoption of quality standards.
7. **Competitiveness and Market Access:** Evaluate the link between quality management and market performance, especially in key industries.

Conclusion

Cameroon's journey in materials and quality management reflects significant progress influenced by global trends, local reforms, and sector-specific initiatives. While leading organizations demonstrate the benefits of international standards and continuous improvement, widespread adoption remains challenged by resource, infrastructure, and regulatory limitations. Strategic investments, policy reforms, and a culture of improvement are essential to drive operational excellence and sustainable growth. Expanding research and practical case studies will further support Cameroon's advancement toward global competitiveness.

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