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THE TAIWAN CRISIS AS A POTENTIAL GLOBAL FLASHPOINT: A STRATEGIC ANALYSIS OF PRC-US CONFRONTATION (2027–2028)

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Abstract

This research provides a comprehensive geopolitical and strategic evaluation of the Taiwan crisis, examining its evolution from the 1949 Chinese Civil War to the contemporary era. By analyzing the divergent interests of the People's Republic of China (PRC) and the United States, the study assesses how territorial integrity, maritime dominance in the Indo-Pacific, and global technological leadership act as primary catalysts for escalation. Special attention is given to recent military-technological advancements, including the PRC's hypersonic missile programs and Taiwan's asymmetric "Porcupine Strategy," alongside the intensification of U.S.-led regional alliances. Furthermore, the paper investigates critical variables such as executive leadership shifts in Washington and their implications for foreign policy continuity. By evaluating potential conflict scenarios and tactical objectives, the study suggests that the 2027–2028 period could represent an elevated risk window for potential regional instability. The research emphasizes the imperative for diplomatic de-escalation to prevent the Taiwan Strait from escalating into a broader conflict.

Keywords

Taiwan Strait, Indo-Pacific Security, Asymmetric Warfare, Geopolitics, PRC-US Relations, Strategic Forecasting

INTRODUCTION

The Taiwan crisis remains one of the most enduring geopolitical challenges of the contemporary era, with historical roots tracing back to the mid-20th century. Although the cross-strait situation has historically fluctuated through cycles of intense friction, it has thus far avoided escalating into open kinetic warfare. However, in recent years, the strategic significance of this dispute has intensified, converging across political, economic, security, and ethno-cultural dimensions - all of which fundamentally heighten the systemic risk of potential conflict. (Yilmaz, 2024; MN.ru, 2025)

Given that the People's Republic of China (PRC) and the United States are the primary strategic protagonists in this theater, any prospective military scenario could potentially involve significant tactical escalation. While direct military conflict has been averted to date, contemporary policy shifts and evolving escalatory behaviors suggest an increasing probability of strategic friction in the near future. To analyze the multifaceted intricacies of this crisis, a systematic and multi-phased analytical approach is required.

METHODOLOGICAL FRAMEWORK

This study utilizes structured strategic scenario analysis to assess the evolving security dynamics in the Taiwan Strait. The analytical framework is built upon observable military developments, official state policies, and recent escalatory behaviors in the Indo-Pacific region. By examining the military-technological advancements of the People's Liberation Army (PLA) alongside Taiwan's asymmetric defensive doctrines, the research maps out potential geopolitical paths and operational timelines for the 2027–2028 window. To ensure a robust evaluation, the study employs a multifaceted methodology:

1. **Historical Method:** Applied to trace the evolution of the cross-strait dispute and understand the foundational patterns of regional deterrence.
2. **Comparative Analysis:** Used to evaluate the military-technological asymmetry between the PLA and Taiwan's defense forces, alongside the divergent strategic interests of the PRC and the United States.
3. **Content Analysis:** Involved a systematic review of official defense white papers, legislative acts, and high-level diplomatic rhetoric to detect shifts in political and military intent.
4. **Strategic Forecasting:** Used to synthesize these inputs and identify the 2027–2028 strategic window as a period of significantly elevated risk.

Limitations and Uncertainties: It must be noted that strategic forecasting in high-stakes geopolitical environments carries inherent limitations. This analysis is bound by the availability of open-source intelligence and public military reporting. Furthermore, unexpected domestic political shifts, economic crises, or sudden breakthroughs in diplomatic backchannels remain critical variables that could significantly alter the projected timelines and scenarios outlined in this study.

1. THE TAIWAN PROBLEM IN HISTORICAL PERSPECTIVE

The origins of the Taiwan crisis are rooted in the immediate aftermath of the Chinese Civil War (1946–1949). Following the victory of the Communist Party led by Mao Zedong, the People's Republic of China (PRC) was officially established on the mainland on October 1, 1949. Consequently, the leadership of the nationalist Republic of China (ROC), under Chiang Kai-shek, retreated to Taiwan along with approximately 1.5 million supporters. A government-in-exile was maintained under the banner of the ROC, with the Kuomintang (KMT) party retaining power until the democratic transitions of the 1980s (Ahmadov, 2024).

This communist victory resulted in a persistent state of dual sovereignty over Chinese territory, creating a fundamental source of cross-strait conflict that has endured since 1949. Throughout the post-World War II period, the United States maintained a robust strategic partnership with the ROC. Washington's sustained military assistance and its long-standing recognition of the Taipei-based regime as the sole legitimate government of China played a pivotal role in the perpetuation of this territorial impasse (Ahmadov, 2024; Report.az, 2025).

Several geopolitical factors prevented a swift resolution of the conflict, allowing it to persist for decades. Chief among these was the outbreak of the Korean War in June 1950, which necessitated the PRC's intervention on the North Korean front. This three-year conflict, concluding in 1953 with an armistice influenced by domestic political shifts within both the USSR and the United States, resulted in the rigid division of the Korean peninsula along the 38th parallel (BBC News, 2024).

By 1954, the United States began implementing preemptive measures to deter PRC pressure on Taiwan and prevent the emergence of a secondary major flashpoint in East Asia. In response to escalating regional tensions, Washington and Taipei signed a Mutual Defense Treaty in 1954. This security pact, which entered into force in March 1955, effectively curtailed the PRC's immediate military options regarding the island. Similar bilateral agreements had been previously brokered between the U.S. and other Asian nations; the primary strategic objective was the "containment" of the Soviet Union, the PRC, and North Korea, thereby preventing the expansion of communist influence in the Far East through a strategic blockade (American Institute in Taiwan, 1979).

The bilateral treaties signed with Japan and the Philippines (1951), South Korea (1953), and Taiwan (1954) collectively formed the San Francisco System. This network of alliances became the cornerstone of U.S. strategic projection in the Far East (American Institute in Taiwan, 1979).

Although another cross-strait crisis emerged in August 1958, it was rapidly de-escalated. Taiwan's security during this period was further maintained by internal instability within the PRC; notably, the "Cultural Revolution" initiated by Mao Zedong in the 1960s - which resulted in profound socio-political fracturing - severely hindered China's internal cohesion. Under such chaotic domestic conditions, initiating a new large-scale military campaign was strategically unfeasible. Subsequently, the rise of Deng Xiaoping, whose administration focused on mitigating the socio-economic damage of the Mao era, provided Taiwan with a temporary reprieve from Beijing's aggressive posture (Mete, 2024).

However, during the Deng Xiaoping era, escalating border disputes and ideological rifts between the PRC and the USSR prompted the United States to adopt a new strategic trajectory. This geopolitical alignment culminated in October 1971, when the United Nations switched formal diplomatic recognition to Beijing. Following this systemic shift, as the PRC began opening up its economy in 1978, Washington recognized the burgeoning opportunities for bilateral trade and the strategic necessity to develop closer relations, leading to the formal establishment of diplomatic ties between the United States and Beijing in 1979 (BBC News, 2024). To bolster mutual trust with Beijing, the U.S. rescinded its 1954 Mutual Defense Treaty with Taiwan and formally withdrew sovereign recognition of the Taipei regime. Nevertheless, the subsequent enactment of the Taiwan Relations Act (TRA) provided a critical legal framework for continued security cooperation and reaffirmed Washington's commitment to Taiwan's defense (BBC News, 2024).

Concurrently, Taiwan began adopting a more conciliatory posture toward the mainland. The 1980s witnessed a relaxation of travel restrictions, and as the PRC prioritized economic modernization, Taiwan emerged as a key partner in bilateral trade and investment. This period of detente culminated in 1991, when Taipei officially declared an end to the state of war with the PRC (BBC News, 2024).

This period of relative stability endured until the Third Taiwan Strait Crisis of 1995–1996. Accusing the Taiwanese government of deviating from the "One China" principle, Beijing conducted a series of provocative missile tests in the Taiwan Strait to intimidate the electorate ahead of the 1996 elections. These maneuvers sparked significant regional and global security concerns (Report.az, 2025).

In the 21st century, the political framework for reunification became increasingly contentious. Although the "One Country, Two Systems" formula was initially conceptualized by Deng Xiaoping to address cross-strait relations, it was formally codified and applied to the Hong Kong transition in 1984. President Xi Jinping explicitly reiterated and reframed this proposal for Taiwan in 2019, asserting it as the primary path for national integration. Taipei's firm rejection of this framework led to a renewed suspension of high-level cross-strait dialogue (Theory China, 2021; YRIS, 2021).

Tensions escalated further on August 2, 2022, following U.S. House Speaker Nancy Pelosi's visit to Taiwan. Beijing responded with unprecedented aggression, initiating large-scale military exercises in the waters surrounding the island. Since 2022, the frequency and scale of these drills have intensified, signaling a shift in China's military posture toward active war preparations. The historical trajectory of the Taiwan crisis underscores the enduring strategic significance of the island (Report.az, 2025; Institute for the Study of War, 2025).

2. THE STRATEGIC SIGNIFICANCE OF TAIWAN FOR CHINA AND THE UNITED STATES: POLITICAL STRATEGIC, AND ECONOMIC INTERESTS

2.1. China's Strategic Imperatives

Taiwan holds paramount socio-political and strategic importance for the People's Republic of China (PRC) in its pursuit of national unification, territorial integrity, and regional hegemony. Officially regarding Taiwan as an inseparable province, Beijing has prioritized the "resolution" of the Taiwan issue as a core national objective. This resolve is consistently articulated in the official rhetoric of the Chinese leadership. In recent years, PRC Foreign Ministry spokesperson

Mao Ning reaffirmed that “Taiwan is an inseparable part of China,” while Foreign Minister Wang Yi emphasized that “China’s development follows an inevitable historical logic,” signaling Beijing’s unwavering determination to pursue reunification (Reuters, 2025b; Dotson J and Harman J, 2025).

The dissolution of the current Taipei administration, full reintegration with the mainland, and the expulsion of U.S. influence from the island constitute China’s primary political objectives. Beyond these political goals, Taiwan’s strategic geography carries critical weight. For Beijing, the annexation of Taiwan would provide direct, unhindered access to the Pacific Ocean. This would facilitate freedom of maneuver in the South and East China Seas, effectively transforming these maritime zones into China’s “internal lakes” and decisively undermining the strategic positioning of the United States and its regional allies.

Integrating Taiwan would breach the U.S.-led “containment blockade,” significantly expanding China’s operational naval capabilities. Consequently, such a move would bolster China’s international prestige and political leverage, enhancing its capacity to engage in peer-to-peer competition with the United States.

Moreover, Taiwan’s status as a major economic powerhouse places the interests of all global parties in direct competition. Boasting the world’s 22nd largest economy, Taiwan holds a unique and irreplaceable bottleneck in the global technology supply chain as the world’s top manufacturer of semiconductor chips. Its largest contract chipmaker, Taiwan Semiconductor Manufacturing Company (TSMC), is one of only two companies globally capable of producing the smallest, most advanced microchips, manufacturing over 90 percent of them. These advanced semiconductors are vital to global consumer electronics, cutting-edge military hardware, and the development of Artificial Intelligence (AI). While Washington has systematically sought to mitigate this overreliance through domestic manufacturing initiatives, the island remains a critical technological engine. By incorporating Taiwan, China could directly capture this critical node, potentially accelerating its own technological self-sufficiency and military modernization (Council on Foreign Relations, 2025).

2.2. The United States’ Strategic and Ideological Interests

Just as Taiwan is vital to the PRC, it holds equivalent strategic weight for the United States. Since the conclusion of World War II, the island has served as a foundational element of the U.S.-led “containment blockade” in the Far East, specifically designed to constrain Chinese maritime expansionism. The network of military installations across the Philippines, Taiwan, South Korea, and Japan effectively obstructs China’s unrestricted access to the Pacific Ocean and curbs its regional hegemonic ambitions. Through this security architecture, Washington seeks to prevent Beijing from achieving the political, strategic, and economic dominance that would pose a direct threat to U.S. national interests. Consequently, the loss of Taiwan would deal a devastating blow to U.S. strategic primacy in the Indo-Pacific (American Institute in Taiwan, 1979).

The transition of Taiwan to Chinese control would similarly lead to a significant erosion of U.S. economic influence. Unfettered Chinese trade expansion and economic consolidation could catalyze a relative decline in the U.S. domestic economy. Furthermore, the seizure of Taiwan’s technological hubs by Beijing would jeopardize the integrity of the global technology supply chain. As the primary consumer and integrator of these high-end technologies, the United States would face heightened national security risks and a precarious economic dependency on its primary geopolitical rival (Council on Foreign Relations, 2025).

Beyond material interests, the subjugation of democratic Taiwan by the PRC would inflict substantial ideological damage on the United States. Given that the PRC’s governance model stands in direct structural opposition to American political values, the fall of Taiwan could be perceived as a triumph of authoritarianism over liberal democracy. Such a shift would signal a resurgence of communist influence in the region, posing a renewed threat to the U.S. and its democratic allies. Therefore, Washington’s support for Taiwan transcends mere geopolitical and economic calculus; it represents a fundamental ideological and normative imperative.

3. MILITARY PREPARATIONS OF THE COMPETING PARTIES

Current geopolitical trajectories, intensive rearmament programs, and large-scale military exercises indicate that the PRC, Taiwan, and their respective allies are increasingly focusing on contingency planning for potential escalatory scenarios. Alongside these primary actors, other regional partners, such as the Philippines and Australia, have also adjusted their strategic postures, reflecting an enhanced emphasis on regional deterrence and security preparedness.

3.1. The People's Republic of China: Accelerated Mobilization and Technological Leap

The 2022 visit of U.S. House Speaker Nancy Pelosi served as a critical catalyst for China's accelerated military mobilization. Since this inflection point, Beijing has conducted a series of strategic maneuvers targeting Taiwan, significantly expanding its regional arsenal, increasing troop concentrations, and transitioning toward next-generation technological warfare systems (Report.az, 2025).

Following the Pelosi visit, the People's Liberation Army (PLA) initiated massive drills encompassing live-fire exercises, aerial sorties, naval blockades, and simulated ballistic missile strikes targeting the waters surrounding Taiwan (Report.az, 2025). In April 2023, following the transit of Taiwan's President Tsai Ing-wen through the United States, Beijing retaliated by launching the large-scale "Joint Sword" military exercises around the island (Lin B, Hart B, Lu S, Price H and Slade M, 2023). According to reports from Taiwan's Ministry of National Defense (MND), the People's Liberation Army (PLA) deployed a peak total of 71 military aircraft and 9 naval vessels within a single day (on April 8) during the maneuvers. Up to this point, this operation represented one of the highest single-day operational figures recorded in 2023. Notably, 45 of the detected PLA aircraft breached the median line of the Taiwan Strait across its northern, central, and southern sectors, subsequently entering Taiwan's southwestern Air Defense Identification Zone (ADIZ). Over the following days of the exercise, the PLA further escalated the maneuvers by practicing simulated joint precision strikes and encirclement tactics (Lin B, Hart B, Lu S, Price H and Slade M, 2023).

The scale of these operations reached a new peak in 2024. In May, the "Joint Sword-2024A" exercises were conducted, featuring J-20 stealth fighters, J-16 multirole fighters, Type-071 amphibious transport docks, and "Dongfeng" (DF) ballistic missiles. This was followed in October by "Joint Sword-2024B," focusing on joint sea-air combat readiness, port blockades, and precision strikes on maritime and land-based targets. Reports indicate that this exercise involved an unprecedented 153 aircraft and 36 naval and coast guard vessels, underscoring its immense operational scope (Reuters, 2025a; Dotson J and Harman J, 2025; China Power CSIS, 2024).

On February 26, 2025, the PLA conducted an unannounced snap exercise, followed by the "Strait Thunder-2025A" drills on April 1-2, 2025. These maneuvers, coordinated by the PLA's Eastern Theater Command, integrated air, naval, ground, and rocket forces to simulate comprehensive blockades and air-superiority operations over the Taiwan Strait. This iteration involved 76 military aircraft, 13 warships, and 4 coast guard vessels (Gan and Cheung, 2025; Dotson and Harman, 2025).

Beyond frequent exercises, China's rapidly advancing military-technological infrastructure was prominently showcased during the military parade on September 3, 2025. This event served as a critical platform for Beijing to unveil its next-generation arsenal, specifically engineered to penetrate U.S. naval defenses and neutralize carrier strike groups. Among the most significant systems presented were four new anti-ship missiles: the YJ-15 (supersonic), the YJ-17 and YJ-19 (maneuverable hypersonic missiles designed to bypass modern interceptors), and the YJ-20 (an aero-ballistic hypersonic missile) (R. Pandey, 2025).

Additionally, the PLA officially demonstrated its Extra Large Unmanned Underwater Vehicles (XLUUV) during the 2025 parade. The unveiling of the AJX002 model - measuring approximately 18–20 meters and equipped with a pump-jet propulsion system - alongside a wider variant featuring X-form rudders, underscored China's operational commitment to sub-surface autonomous warfare (R. Pandey, 2025).

Supporting these technological advancements is China's immense manpower and financial capacity. With over 2 million active personnel and a defense budget officially confirmed at 1.94 trillion yuan (approximately \$268-272 billion) for the 2026 fiscal year — representing a 6.9% increase over the previous

year — Beijing possesses substantial structural advantages in any protracted high-intensity conflict scenario (China Military Online, 2026; Warpower China, 2026).

3.2. Taiwan: Defensive Resilience and the “Porcupine Strategy”

For its part, Taiwan is proactively enhancing its defensive capabilities and civil preparedness to counter escalating cross-strait pressures. In recent years, the administration has institutionalized two primary civil defense drills - “Wan An” and “Min An” - under a strategic framework aimed at achieving comprehensive readiness for defensive warfare (CNN, 2025).

Throughout 2024 and 2025, Taipei conducted a series of sophisticated maneuvers as a direct strategic counter-response to the PLA’s “Strait Thunder-2025A” exercises. Central to this effort were the “Han Kuang 41” drills, which spanned ten days and nine nights. This large-scale exercise involved the mobilization of over 22,000 reservists and featured live-fire operations utilizing newly acquired U.S. Abrams M1A2T main battle tanks. The maneuvers also integrated HIMARS (High Mobility Artillery Rocket Systems) alongside advanced autonomous underwater and land-based drones. Executed in tandem with civil defense protocols, these exercises served the dual purpose of refining asymmetric military doctrine and signaling Taiwan’s defensive resilience to the international community (Defense News, 2025; Politico, 2025; Global Taiwan Institute, 2024; Dotson J and Harman J, 2025).

Taiwanese intelligence assessments suggest that the PRC may initiate a full-scale invasion as early as 2027, necessitating total operational readiness by this strategic milestone. With a population of approximately 23 million and a standing army of around 170,000 active-duty personnel, Taiwan faces a significant numerical disadvantage against the PLA’s conventional manpower. Furthermore, its defense budget, which stood at approximately \$18 billion, remains substantially lower than Beijing’s massive expenditures. Consequently, Taipei’s operational doctrine prioritizes a defensive posture centered on guerrilla tactics and the “Porcupine Strategy”—a concept designed to make the island prohibitively costly to invade by leveraging its rugged geographical terrain to sustain a protracted defense (Culver, 2025; Military Power Rankings, 2026; Global Military, 2026; Wolski, 2026; Remžová and Urhová, 2024; Epicenter, 2023).

In response to sustained Chinese military pressure and diplomatic calls for increased burden-sharing from the United States, Taiwan has moved to elevate its defense spending to \$31.3 billion for the 2026 fiscal year. This represents a 23% increase, aligning Taipei’s defense-to-GDP ratio more closely with the “NATO model.” These allocated funds are specifically earmarked for enhancing coastal defense systems and modernizing the island’s asymmetric warfare capabilities (Gökce, 2025; Lee et al., 2025; Dotson, 2026; Thompson, 2026).

3.3. The Readiness of U.S. Alliances and Regional Partners

As Taiwan’s primary security guarantor, the United States maintains a robust, combat-ready military posture characterized by the consistent allocation of massive defense budgets and the accelerated development of cutting-edge military technologies. Leveraging tactical lessons from the conflict in Ukraine, the Pentagon has established a formidable fleet of unmanned maritime surface vessels (USVs) specifically designed for a potential conflict with the PRC (Panella and Mears, 2025; Reichardt, 2026; SOFX, 2026).

In tandem with its own modernization, Washington is systematically preparing its regional allies for maritime contingencies. A critical milestone in this regional mobilization was the joint military exercises conducted by the Philippines and Australia from August 15–29, 2025, amid escalating tensions in the South China Sea. This multi-national force was further bolstered by the participation of the Royal Canadian Navy and the U.S. Marine Corps. To enhance regional deterrence, the U.S. has finalized a \$97 million sale of Javelin missile systems to Australia, including advanced launchers and comprehensive technical support (Gatchalian, 2025; DSCA, 2025).

Concurrently, the United Kingdom has secured its long-term strategic positioning in the Indian Ocean by finalizing an agreement on the political status of the Chagos Archipelago with Mauritius. Under this historic treaty, London cedes sovereignty over the archipelago to Mauritius while successfully retaining administrative and operational control over the strategically vital Diego Garcia island for an initial period

of 99 years. Backed by a comprehensive financial support package provided by the UK to Mauritius, this arrangement ensures the uninterrupted presence of the joint UK-U.S. military facility. The base remains a cornerstone for U.S. force projection in the Indo-Pacific and a vital element of the broader Western strategy to counter Chinese maritime expansionism (Pandey P, 2026).

In a potential conflict scenario, regional partners—such as Japan—could play a role in supporting U.S. strategic operations and logistical security. Beyond these core partners, other regional actors might adopt supportive or non-aligned positions based on their specific national interests as the crisis unfolds. This evolving framework of strategic cooperation suggests a potential shift toward collective deterrence, aimed at maintaining stability within the Indo-Pacific.

4. POTENTIAL CONFLICT SCENARIOS

4.1. The United States: Strategic Commitments and Leadership Dynamics

The United States remains a global power with critical strategic commitments to safeguarding stability and its vital interests in the Taiwan Strait. This stance has been consistently reaffirmed by high-ranking officials; for instance, Raymond Greene, the de facto U.S. ambassador to Taiwan, has stated that Washington remains committed to its pledges to protect the island, upholding its statutory obligations under the 1979 Taiwan Relations Act. Beyond the strategic and economic interests previously analyzed, the presence of approximately 80,000 American citizens in Taiwan serves as a significant humanitarian and political factor for potential U.S. involvement. In the event of a cross-strait crisis, the principles of protecting and evacuating its nationals could serve as a primary catalyst for U.S. kinetic intervention (Cemerl.org, 2025; Nezavisimaya Gazeta, 2024).

However, within strategic forecasting, the potential realignment of U.S. foreign policy under a second Donald Trump administration might introduce a highly volatile variable that could significantly alter this geopolitical equation.

Historically, Trump's first administration has played a distinctive role in strengthening institutional and military support for Taipei. Between 2017 and 2021, the administration enacted the Taiwan Travel Act (2018), authorized over \$18 billion in arms sales, and inaugurated a \$250 million complex for the de facto embassy in Taipei. These actions, alongside aggressive policies against Chinese technological entities such as Huawei, underscored a confrontational posture toward Beijing's regional ambitions (Babushok, 2024; Cemerl.org, 2025; Council on Foreign Relations, 2025).

In his second presidency, the escalation of an overt economic competition and the persistent use of hawkish rhetoric against the PRC may further complicate bilateral relations. Recognizing China's burgeoning power as a peer competitor in the Indo-Pacific, the current administration might adopt an increasingly assertive posture. While official policy remains bounded by strategic ambiguity, these dynamics suggest that Washington could actively contemplate military participation in a cross-strait conflict to prevent a forceful shift in the regional status quo.

A content analysis of current U.S. political debates suggests that domestic political dynamics may occasionally correlate with strategic assertiveness abroad. Within the framework of the Diversionary Theory of War, it can be tentatively argued that an administration confronting severe internal polarization might utilize a firm foreign policy posture to foster domestic cohesion and national mobilization (Levy, 1989). In this context, maintaining a robust stance in the Taiwan Strait could theoretically serve as a mechanism for reinforcing political unity against an external systemic rival. However, this domestic imperative does not operate in isolation; rather, it appears to interlock with deep-seated institutional commitments to maintaining regional stability and safeguarding the rules-based international order. Therefore, any potential escalation would likely be driven by a complex interplay of internal consensus-building and documented, long-term strategic defense doctrines in the Indo-Pacific, rather than domestic political motivations alone.

Furthermore, the administration's efforts to de-escalate existing secondary flashpoints - most notably the Russia-Ukraine conflict - can be interpreted as a strategic effort to consolidate American power. By

demanding increased burden-sharing from NATO allies and seeking to reduce resource expenditure in Eastern Europe, Washington may aim to conserve its defense industrial base for a high-stakes confrontation with China. This resource optimization is frequently cited by strategic analysts as a necessary prerequisite for maintaining long-term deterrence in the Pacific theater (Aldisert, 2025).

Another pivotal, albeit highly speculative, strategic maneuver involves potential attempts to weaken the Sino-Russian axis. Analysts suggest that high-level diplomatic engagements, such as the Alaska Summit, might be utilized to probe potential fissures between Moscow and Beijing (BBC News, 2025). Under this framework, Washington could leverage specific regional concessions to incentivize Russia to distance itself from China's strategic orbit. This proposition might find fertile ground over the long term; despite their current shared ideological opposition to the West, Russia remains historically wary of a dominant power on its borders. The long-term rise of the PRC could pose structural challenges to Russian interests in Central Asia and the Far East, potentially compelling Moscow to recalibrate its ties with China to ensure its own regional influence is not entirely eclipsed (Liang, 2025).

Trump's broader geopolitical strategy appears to encompass a campaign designed to restrict the PRC's global leverage by targeting its key energy and logistical partnerships. This posture manifests through three primary analytical vectors:

1. The Middle East Vector and Energy Security: Geopolitical dynamics in the Middle East, including joint U.S.-Israeli kinetic operations against regional infrastructure, could significantly disrupt China's external energy dependencies and trans-continental logistical networks, rendering traditional transit corridors increasingly unstable (Downs, 2026; Sun, 2026).
2. The Connectivity Vector: Through the advancement of alternative trade infrastructure, such as the proposed 'Trump Route,' Washington aims to provide counterweights to China's influence in trans-continental projects like the Middle Corridor, potentially increasing Beijing's economic and geographic isolation (U.S. Department of State, 2026).
3. Strategic Denial in Latin America: Political shifts and realignments in Latin America, such as the changing political landscape in Venezuela, suggest a systematic reduction of Beijing's extra-regional leverage. Within the framework of Strategic Denial, these shifts highlight a broader U.S. effort to counter China's economic anchor points in the Western Hemisphere, potentially forcing a reconfiguration of Chinese resources prior to any major escalation in the Indo-Pacific (Congressional Research Service, 2025).

While these geopolitical pressures introduce significant friction, they do not render a direct military confrontation inevitable; instead, they suggest a heightened risk environment where strategic miscalculations could occur. In a potential conflict scenario, the United States might pursue a strategy aimed at the long-term attrition of Chinese capabilities rather than a swift, decisive engagement. Operationally, the U.S. military is projected to center its weight on aerospace and naval assets, adopting a technology-driven standoff strategy (Army.mil, 2021).

While specialized units could theoretically be utilized for targeted surgical strikes, Washington would likely remain reluctant to deploy large-scale ground forces against the PRC's numerical superiority. Instead, the U.S. would probably provide maritime and aerial support while relying on a regional coalition—including Taiwan, the Philippines, and Australia—to sustain the operational theater. Under this framework, the overarching strategic objective might center on the systematic attrition of China's capabilities, aiming to encourage a cessation of hostilities through a comprehensive logistical and economic blockade (Army.mil, 2021).

Figure 1. US blockade of China

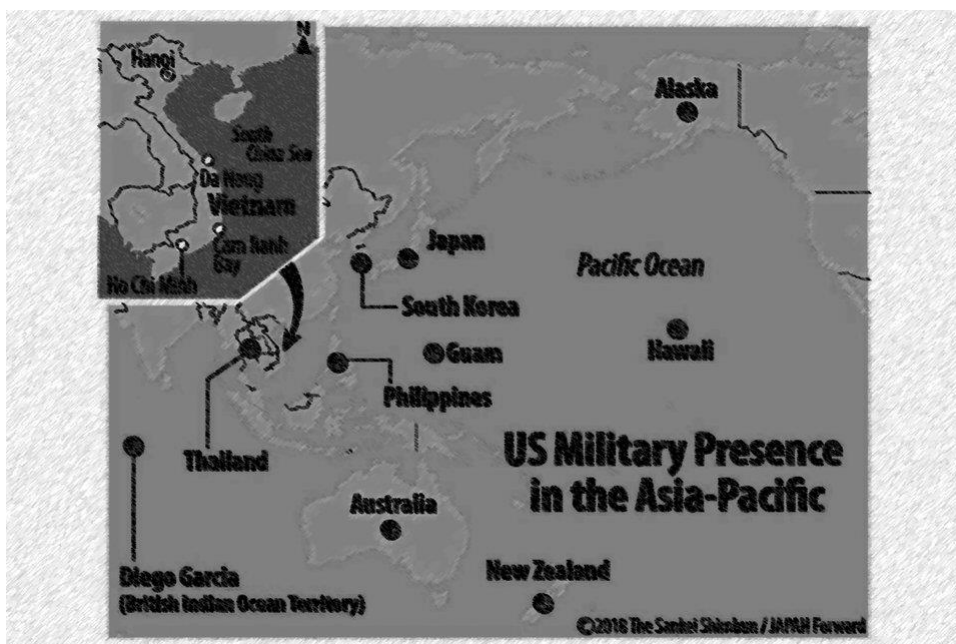


Figure 1. The U.S.-led Strategic Blockade and "First Island Chain" Containment of the PRC. Source: Adapted from Army Recognition Group (2024). *US Air Force Faces Challenges in Defending Its Pacific Bases Against Potential Chinese Missile Attacks*. Armyrecognition.com.

4.2. The People's Republic of China: Strategic Constraints and the "Blitzkrieg" Objective

While China's intensive military development, enhanced combat readiness, and vast manpower offer significant structural advantages, several critical constraints remain at the forefront of Beijing's strategic calculus.

Chief among these is the People's Liberation Army's (PLA) lack of recent combat experience. The Chinese military has not engaged in large-scale kinetic warfare since the Sino-Vietnamese conflict of 1979 (Hoover Institution, 2022). This nearly 45-year hiatus from active operations raises fundamental questions regarding the PLA's practical operational proficiency - a factor viewed with caution by contemporary Chinese strategists (Heath, 2018; Seitz, 2026).

Furthermore, the formidable presence of U.S. air and naval assets in the Indo-Pacific poses a severe threat to any trans-strait operation. An attempted amphibious invasion would likely incur catastrophic casualties, particularly during the precarious crossing of the Taiwan Strait. Such an assault would require a logistical undertaking comparable in scale to the Normandy Landings (D-Day) of World War II, yet conducted within the lethal environment of modern precision-guided munitions and advanced coastal defense systems. Establishing and sustaining a logistical bridgehead to resupply a massive invasion force remains a monumental challenge for the PLA (BBC Türkçe, 2024).

In recognition of these obstacles, China is developing specialized missile systems and amphibious transport capabilities to bridge this logistical gap. However, Taiwan's rugged, mountainous topography presents another barrier, as it is ill-suited for rapid mechanized advancement and provides an ideal sanctuary for asymmetric "Porcupine Strategy" tactics. A Chinese inland advance could mirror the grueling island-hopping campaigns of the Pacific theater - prolonged, high-casualty operations with diminishing strategic returns (Remžová and Urhová, 2024; Epicenter, 2023).

Figure 2. China's blockade of Taiwan

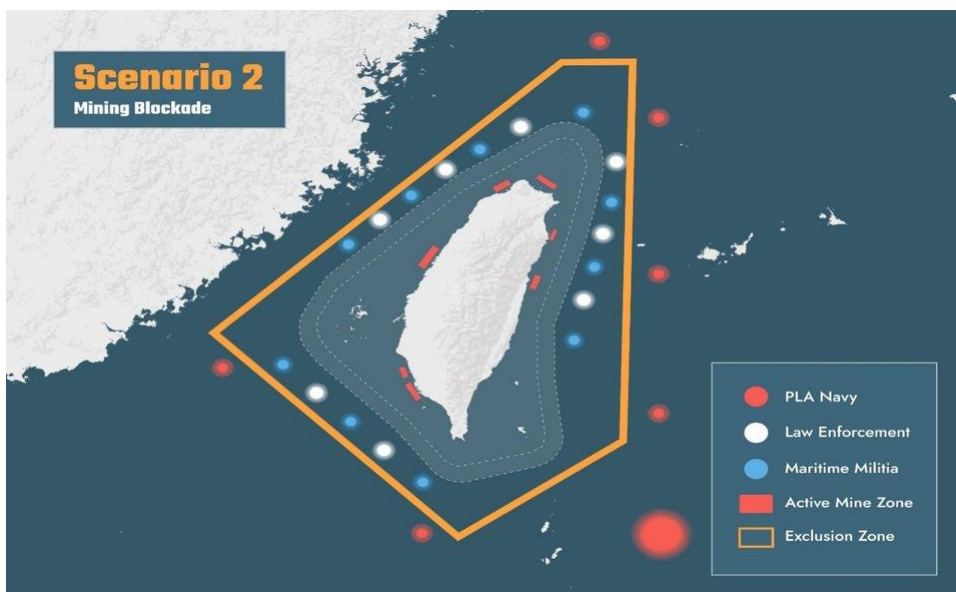


Figure 2. The PLA's Strategic Blockade Model of Taiwan: Designated Combat and Exclusion Zones. Source: Adapted from CSIS China Power Project. (2024). China's blockade options against Taiwan. <https://features.csis.org/chinapower/china-blockade-taiwan/>

Ultimately, China's overarching operational objective is a "Blitzkrieg" - a rapid, decisive victory achieved within a 2-to-4-week window (USHMM, n.d.). The strategic goal involves seizing all critical nodes, capturing Taipei, decapitating the incumbent government, and paralyzing energy and communication networks. Beijing aims to reintegrate an economically potent Taiwan, necessitating a strategy that minimizes collateral damage to urban and industrial infrastructure. Consequently, the projected timeline for total administrative control is estimated at a maximum of 6 to 8 weeks.

In contrast, the United States is projected to pursue a strategy focused on long-term strategic denial and structural attrition. Rather than aiming for a swift military resolution, Washington's broader operational framework might center on preventing the PRC from utilizing key strategic infrastructure, while simultaneously seeking to transform the conflict into a protracted war of attrition that could systematically deplete Beijing's military and economic resources (Culver, 2025; Reichardt, 2026).

4.3. Taiwan: Asymmetric Resistance and Existential Vulnerabilities

For Taipei, any conflict scenario could potentially involve severe and far-reaching structural challenges. Under the most favorable circumstances, the island would coordinate with the United States and its regional allies to mount a formidable defense centered on its sovereignty. By employing the "Porcupine Strategy" and engaging in asymmetric guerrilla warfare, Taiwanese forces might seek to inflict maximum casualties through rapid, unconventional strikes launched from the island's dense forests, rugged mountain ranges, and extensive subterranean tunnel networks (Epicenter, 2023; Remžová and Urhová, 2024).

Furthermore, the Taiwanese leadership may opt to establish a government-in-exile, either prior to or immediately following the onset of a full-scale invasion. Such a strategic move would aim to preserve political legitimacy and provide a framework for continued resistance against PRC occupation from abroad. Although Taiwan currently lacks universal recognition under international law, a government-in-exile could leverage potential shifts in the global legal order to garner international support and safeguard the administrative continuity of the Republic of China (ROC), thereby averting total political annihilation.

However, a critical vulnerability for Taiwan remains its high degree of energy dependency. In any opening phase of hostilities, Beijing is projected to prioritize the disruption of the island's energy

infrastructure to paralyze defensive operations and internal logistics. The systematic failure of the national energy grid would significantly undermine Taipei's strategic cohesion and jeopardize its ability to sustain a prolonged defense.

In the event of a direct, unaided confrontation with the PRC, Taiwan's prospects for survival could potentially face unprecedented structural challenges. Faced with such an existential threat, Taipei might ultimately be compelled to consider a negotiated reunification under a framework of special autonomy to avoid total military destruction. While this scenario represents the least kinetic path, it would fundamentally and irreversibly alter the regional status quo and the global balance of power (Culver, 2025).

4.3.1. Deterrence Dynamics and Non-Escalation Factors

While the potential for kinetic escalation in the Taiwan Strait remains a critical focus of strategic forecasting, a balanced scenario analysis requires a comprehensive evaluation of deterrence dynamics and non-escalation pathways that mitigate the probability of an outright conflict. The preservation of the cross-strait status quo is heavily contingent upon the concept of integrated deterrence, which underscores that the military, economic, and political costs of an invasion would significantly outweigh any perceived strategic benefits for Beijing.

Within this context, the framework of gray-zone strategy encompasses synchronized military exercises, maritime patrols, airspace incursions, disinformation campaigns, and sustained political pressures. Strategic analysts suggest that these measures are utilized by Beijing to apply political-military pressure on the Taiwanese government to join unification frameworks. Furthermore, certain perspectives indicate that the PRC resorts to these sub-conflict maneuvers primarily to induce strategic doubt and institutional skepticism within Taiwan (Campbell, 2026).

Nevertheless, official Beijing is observed to increasingly prioritize gray-zone operations, a methodology widely considered highly cost-effective under current geopolitical circumstances. This approach enables the PRC to maintain continuous leverage and pressure over Taiwan without incurring prohibitive material or political expenses. As this gray-zone campaign persists, it creates a complex strategic environment; the United States frequently seeks to manage risks by avoiding direct kinetic intervention options, while Taiwan remains deeply reluctant to initiate any actions that could be construed as the first strike. Consequently, the counter-exercises and defensive adjustments executed by Taipei in response to Beijing's regular maneuvers continuously drain Taiwan's operational readiness and place a significant structural strain on its military-economic budget (Lawrence, 2026).

Concurrently, Washington's regional allies exhibit a strong inclination to avoid triggering a major escalation with Beijing. As a structural consequence, these allied nations frequently advocate for a more cautious, risk-averse approach from the United States, which effectively functions as an additional systemic buffer, dampening immediate pressures toward an outright military conflict (Lawrence, 2026).

To counter these gray-zone maneuvers, Taipei, in close coordination with Washington, utilizes an asymmetric defense framework, commonly operationalized as the "porcupine strategy." The primary objective of this asymmetric approach is to resist and deter a rapid amphibious invasion by the PRC. This architecture primarily includes the deployment of anti-ship missile systems, sea mines, and various localized coastal defense systems. Furthermore, Taiwan's specific geographic location and rugged topography significantly reinforce this asymmetric posture, serving to limit the PLA's direct invasion capabilities. Concurrently, to mitigate the operational strains of gray-zone pressure, some Taiwanese officials recommend sustained investments in traditional aerospace and air defense capabilities, including fighter aircraft and helicopters (Campbell, 2026).

4.3.2. Allied Support and Military Investments

The United States serves as the primary external guarantor of Taiwan's defense capabilities against potential PRC aggression. According to official data provided by the Department of State to the U.S. Congress, Washington has authorized more than \$39 billion in foreign military sales (FMS) to Taipei since 2015 (Campbell, 2026).

Concurrently, in May 2026, Taiwan's legislature approved a comprehensive \$24.8 billion, eight-year special defense budget specifically designated for arms procurement from the United States. This institutional step underscores Taipei's intention to systematically expand its defense spending, with overall military expenditures projected to reach approximately 3.3% of the country's Gross Domestic Product (GDP) in 2026 (Campbell, 2026).

During its second term, the Trump Administration has reaffirmed its commitment to supporting Taiwan and preserving regional stability. The 2025 U.S. National Security Strategy explicitly notes that "preventing a conflict over Taiwan, ideally by maintaining a military advantage, is a priority." The strategy further elaborates: "We will also maintain our long-standing declaratory policy toward Taiwan, meaning the United States does not support unilateral changes to the status quo in the Taiwan Strait" (Lawrence, 2026).

While Washington's primary interest remains the preservation of the regional status quo against PRC revisionism, the United States is also observed to approach the Taiwan issue with heightened caution to safeguard its strategic credibility and sustain the trust of its key regional allies, including South Korea, Japan, the Philippines, and Australia. Consequently, even if the risk of a kinetic conflict persists, Washington is projected to prioritize diversified non-escalatory alternatives and robust integrated deterrence mechanisms over direct military options (Sacks, 2026).

5. ECONOMIC RISKS AND REGIONAL IMPLICATIONS

The expansion of Beijing's gray-zone operations and coercive activities within and around the Taiwan Strait remains a profound source of concern for both regional and global actors. In recent years, intensifying military drills and escalating pressure from the PRC have conversely generated adverse economic implications for Japan. Due to unresolved historical grievances and contemporary economic competition, Tokyo is structurally incentivized to support Taiwan against regional instability, while simultaneously striving to avoid any direct kinetic escalation scenarios (Manning, 2026).

Consequently, as a calculated deterrence measure, Japan established its new Joint Operations Command in March 2025. However, strategic projections indicate that a transitional period of approximately 5 to 10 years may be required to address operational gaps before this institution can function with optimal effectiveness. As a structural result, Japan is expected to lean toward non-military alternative mechanisms designed to actively de-escalate potential crises in the Strait (Manning, 2026).

As another pivotal regional actor, Malaysia represents a prime example of a state grappling with profound economic risks and systemic vulnerabilities. Kuala Lumpur's dual dependency—maintaining robust economic linkages and cordial ties with Beijing while simultaneously preserving close political and trade relations with Washington—creates significant structural pressures. Any potential crisis or kinetic conflict in the Taiwan Strait is projected to trigger severe domestic economic and social disruptions within the country. This reality underscores how cross-strait instability directly threatens the national interests of regional states, thereby incentivizing these actors to proactively contribute to diplomatic and non-military mechanisms designed to prevent escalation (Nouwens et al., 2026).

Furthermore, the systemic implications of any escalation scenario in the Taiwan Strait extend far beyond regional boundaries, posing severe threats to global macroeconomic and social stability. According to projections by Bloomberg Economics analysts, an outright conflict in the Strait would deplete approximately \$10.6 trillion from the global economic output within the first year alone. Consequently, while sovereign states and international markets are increasingly implementing contingency measures to absorb potential war shocks, they are concurrently observed to intensify strategic postures aimed at neutralizing escalation triggers. The overarching consensus remains that any kinetic confrontation would catalyze an unprecedented global economic crisis, the ultimate severity of which would scale exponentially depending on the duration and trajectory of the conflict (Bostl, 2026).

In summary, the aforementioned dynamics collectively function as critical mechanisms that help mitigate the probability of a real kinetic escalation under current circumstances. On one hand, the United States remains a primary stakeholder in maintaining the cross-strait status quo, primarily driven by its continuous

military-strategic signaling toward Taiwan and the systematic formulation of alternative deterrence strategies.

On the other hand, the PRC is expected to continuously utilize gray-zone tactics and targeted pressures to incrementally alter the regional status quo in its favor. This approach potentially enables Beijing to achieve specific strategic objectives or compel the opposing side toward negotiated frameworks without reverting to direct military conflict.

Concurrently, third-party regional and global actors, structurally driven by the necessity to avoid catastrophic economic shocks and global recessions, are increasingly incentivized to align with integrated deterrence frameworks and promote diplomatic alternatives. Consequently, through this multi-layered web of non-escalation pathways, the relevant stakeholders may successfully bypass catastrophic conflict and war scenarios in the Taiwan Strait.

CONCLUSION

Current research and analysis underscore that the People's Republic of China has entered a phase of intensive and sophisticated military mobilization. The modernization of its strategic arsenal, the development of next-generation defensive and offensive weaponry, and the increasing frequency of large-scale, multi-domain exercises in the Taiwan Strait - coupled with the hardening of diplomatic rhetoric - collectively signal a significant transition in the regional security architecture. It remains a distinct possibility that Beijing may seek to restore its territorial integrity through kinetic means in the near future. However, the Chinese leadership must weigh these sovereign ambitions against the substantial risks of catastrophic military attrition and potential strategic failure. Consequently, pursuing reunification through non-kinetic, diplomatic avenues remains the most prudent and strategically sound course of action for Beijing to preserve its domestic socioeconomic stability and international standing.

Simultaneously, Taiwanese officials must navigate these volatile dynamics with a commitment to strategic realism. Given the stark military asymmetry, Taipei lacks the independent capacity to engage in prolonged, peer-to-peer conventional combat with the PLA. Despite recent investments in defense modernization and asymmetric capabilities, relying solely on external security guarantees to maintain an escalatory posture remains a high-risk geopolitical approach. Taipei's strategic interests are best served by de-escalating tensions and seeking a sustainable equilibrium in cross-strait relations. Failure to achieve diplomatic equilibrium risks a conflict in which Taiwan would inevitably bear the most devastating socio-economic and structural consequences.

While the United States pursues extensive strategic interests against its regional rivals, a direct kinetic conflict would lead to severe material and structural losses for Washington as well. The historical memory of protracted high-intensity conflicts in East-Asia serves as a somber lesson for contemporary policymakers. Strategic caution dictates that avoiding a direct military confrontation with China is far more advantageous for the preservation of long-term American regional presence and global economic stability. Consequently, a risk-averse diplomatic framework remains essential to secure core national interests without jeopardizing the fragile stability of the Indo-Pacific.

Given Taiwan's internal assessments that Beijing may attempt military reunification by the 2027 milestone - and considering that the next U.S. presidential election cycle culminates in 2028 - this transitional period emerges as a critical strategic window for potential regional instability. The timing and nature of such a crisis will be dictated by a convergence of operational factors, including seasonal maritime weather conditions in the Taiwan Strait, as well as the rapidly evolving political, economic, and military landscape between the two global superpowers.

However, the elevated risks associated with the 2027–2028 strategic window do not imply that a kinetic conflict is inevitable. The trajectory of cross-strait relations remains heavily contingent upon dynamic strategic variables, including institutional military readiness, calculated political decisions, and the credibility of regional alliance frameworks. Rather than a predetermined path toward war, this transitional phase underscores the efficacy of integrated deterrence and robust crisis-management mechanisms. By strengthening asymmetric defensive postures and reinforcing diplomatic communication channels, the

involved stakeholders retain the capacity to actively neutralize escalation triggers and maintain regional stability.

Ultimately, the findings of this research indicate that while the probability of tactical miscalculations remains elevated, a cross-strait war is not an unavoidable outcome. The systemic implications of an outright conflict would deplete trillions of dollars from the global economic output and catalyze unprecedented macroeconomic disruptions. Consequently, the prioritization of multilateral diplomatic instruments, risk-reduction strategies, and structured conflict-resolution mechanisms remains a strategic imperative for all regional and global actors seeking to navigate this complex geopolitical landscape.

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REDEFINING RESEARCH EXCELLENCE: COARA'S ROLE AS A NORM ENTREPRENEUR IN QUALITATIVE RESEARCH ASSESSMENT

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Abstract

This article addresses CoARA's (Coalition for Advancing Research Assessment) implicit assuming of a norm entrepreneur role (concept rooted in the Constructivist International Relations theory), within the broader and ever-changing environment of scientific evaluation. This reconfiguration of research assessment holds the potential to facilitate the attainment of strong knowledge-based economies, while also reshaping the role of science diplomacy in projecting epistemic influence. Through an analytic assessment of the status quo, which is mostly shaped by scientometrics, and by highlighting its limitations, the article emphasizes CoARA's acquired part in the institutional and epistemic transition towards qualitative research assessment methodologies, primarily peer review – the main tool for unveiling scientific excellence. Drawing on key theoretical frameworks and programmatic documents, the study emphasizes the manner in which CoARA acts as a norm entrepreneur in advocating for reform, when placing peer review as the pillar for effective research evaluation and excellence identification. This transition highlights how the geopolitics of knowledge are shifted, considering that the competition for excellence is complemented by the attempt to redefine the rules of global scientific legitimacy.

Keywords

Research Assessment, Scientometrics, Peer Review, CoARA, Norm Entrepreneurship, Scientific Excellence, Science Diplomacy, Knowledge-Based Economy

INTRODUCTION

Although CoARA is a relatively recently enacted initiative – being inaugurated in 2022, it strives to promote qualitative research assessment, while overhauling the status-quo - primarily modelled by scientometrics, considering that its rhetoric holds the potential to positively impact the research environment. Moreover, this shift can also impact the international system by contributing to the imposition of a norm that acts as a catalyst for strong knowledge-based economies, especially within the broader context marked by the weaponization of interdependence and heightened mistrust in multilateralism. Among the four main avenues through which research assessment is typically conducted, namely: the evaluation of research outputs for publication in journals or academic publishing houses, the assessment of research proposals and projects for funding purposes, the evaluation of individual researchers and academics for career advancement, and the assessment and ranking of research institutions, CoARA places particular emphasis on the assessment of research proposals and the evaluation of individual researchers. These two branches are critical leverage points for ultimately ensuring research excellence.

In order to make room for the introduction of a new norm, the norm life cycle theory (Finnemore & Sikkink, 1998) argues that the present state of affairs needs to be disputed – usually through the agency of norm entrepreneurs. Hence, this paper first assesses the shortcomings of the status-quo, shaped by scientometrics, by summarizing the critiques raised by fellow researchers and drawing comparisons between quantitative and qualitative research assessment - mainly peer-review. This is especially timely considering that the academic world has been involved in efforts to address the excesses and deviations specific to scientometrics. Furthermore, this article emphasizes the way CoARA establishes its rhetoric concerning the imperative shift in research assessment, thus assuming the role of a norm entrepreneur. It can be argued that CoARA evolves into this capacity through the emphasis placed on the norm of qualitative research assessment, primarily peer review and the promotion of narrative CVs, whilst challenging the shortcomings of the current prevailing system.

CONSTRUCTIVISM AND THE THEORY OF NORM ENTREPRENEURS

In the International Relations' domain, the theory of norm entrepreneurs explains how certain actors succeed in advancing new norms within the international system. This theoretical framework was first enacted within the more far-reaching Constructivist IR theory, arguing that norms cannot crystalize inherently, but are strategically posited by norm entrepreneurs, namely entities seeking to address the limitations of the current situation. CoARA follows this paradigm, by crystallizing an institutional platform and advancing a framing strategy (namely The Agreement), that complement each other in order to facilitate the emergence of an environment open to the widespread adoption of qualitative research assessment. Their prospect for success is reliant upon the inherent appeal of the proposed norm, and on their ability to mobilize coalitions, ensure support and secure the integration of the advanced norm within international bodies, policies and practices. The concept of "norm entrepreneurs" remains central in the theory of norm construction. It is mandatory to acknowledge the fact that the process of norm construction is highly intricate, comprising a multitude of elements and being triggered by the actions of norm entrepreneurs - who possess the clearest understanding of how the proper conduct should be ensured. The emergence of the norm relies on how convincing norm entrepreneurs can be. They are engaged in a continuous effort to determine important international actors, primarily states to welcome innovative norms (Finnemore and Sikkink, 1998: 895). There are two main processes to be undertaken by norm entrepreneurs to better their chances at success. Firstly, they shall be capable to underline the existence of a normative issue that is serious enough to justify the complete overthrow of the existing state of affairs and secondly, they shall be capable to provide a normative solution for that problem (Bloomfield, 2016: 322).

WHAT IS SCIENTOMETRIC EVALUATION AND WHY IS IT STILL RELEVANT?

In spite of the fact that scientometrics instruments such as the impact factor, or the h-index have been acknowledged as key indicators of scientific performance and researcher status, there is an amplifying consensus within the scientific community that the emphasis should be placed on qualitative means of evaluation in order to contribute to frontier research and the eventual expansion of knowledge. This rhetoric transition has been incited, inter alia, by the growing prevalence of the Matthew effect (first outlined by Robert Merton in 1968), the proliferation of fraudulent pieces of writing, along with the understanding that briefing in distinguished journals and targeting a high Hirsch index have become ends in themselves, rather than an implicit result of genuine knowledge production.

Derek J. de Solla Price, considered the founder of scientometrics, referred to this process as the "science of science", an endeavour which implicates the exploration of various research methods in order to gain insight into the principles, laws, and processes that shape scientific knowledge (Wu et al., 2022: 4). It is important to point out from the outset that scientometric indices remain, to this day, extremely relevant and compelling, considering that they constitute the basis upon which funds are allocated, and career advancements are ensured (Teplitskiy et al., 2022: 1). Science diplomacy also positions scientific performance, still predominantly disclosed by scientometrics, as a resource for international prestige. The aforementioned indicators are largely utilized for outlining a state's reputation and epistemic prestige.

These indicators persist as key assessment tools for the evaluation of scientific journals, research groups and the efficiency and status of individual researches (Simko, 2015: 2). Wu pleads that a comprehensive grasp of the fundamental structure, meaning the manner in which citations are distributed and how they evolve, is essential for the valid evaluation of outcomes (Wu et al., 2022: 2). The impact factor engenders an illusion of exclusivity and prestige predicated on the assumption that it predicts scientific virtue. However, this assumption is not supported by empirical data or the performance of individual scientists (Brembs et al., 2013: 7).

THE DOWNSIDES AND LIMITATIONS OF SCIENTOMETRICS

Lately, there is a growing consensus within the “research on research community” that the aforementioned metrics are becoming obsolete and even counterproductive to what science actually entails. Scholars like Binswanger, Hicks, and Wawer assert that publishing no longer fulfils its basic fundamental purpose of disseminating knowledge, but becomes an end in itself (Wawer, 2019: 36). After conducting the literature review for this article, it has been established that there are more negative aspects related to solely employing the practice of scientometrics than desirable ones, a reality which calls for rapid reform.

Some recruiters request h-index values for candidates. A number of universities have introduced threshold h-index quotas and the number of articles in “high-impact” journals as indispensable criteria for promotion decisions (Hicks et al., 2015: 430). This crystallizes a conducive context for following hollow numbers. Considering that researchers’ career relies upon how much and where they publish, there is an undeniable risk that the implicit pressure will cause scholars to produce a greater number of writings of questionable quality, as indicated by Wawer (Wawer, 2019: 35). This dire reality elicits various unsound publishing schemes. Furthermore, it causes the release of virtually meaningless studies that are neither used nor cited and the repetition of experiments under slightly different conditions with the sole aim of obtaining “additional” data and even fraudulent publications that include plagiarism and fabricated results (Wawer, 2019: 36). The overproduction of unwanted papers leads to article inflation, which diminished the papers’ value, mainly because they become too fragmented. As a result of this phenomenon, good writings are buried under the massive production of papers that lack innovative and impactful content (Wawer, 2019: 37). As Gomes notes, another bias which arises from the practice of scientometrics is the inequality in science recognition, across the globe. The already established hegemonies in global science steadily increase their portfolios, while less accomplished scholars fall short, regardless of the excellence of their works and findings (Gomez et al., 2022: 921). While prolific countries tend to be over-cited for their work relative to what they study, peripheral countries are increasingly under-cited (Gomez et al., 2022: 921). The existence of international inequalities has the potential to disrupt the emergence and flow of knowledge within the global scientific community (Gomez et al., 2022: 929). Another negative aspect which originates from the practice of scientometrics derives from interdisciplinary differences and refers to the significant discrepancy in the median number of citations received by papers across diverse research domains (Simko, 2015: 2). The issue of normalizing bibliometric indicators in order to account for interdisciplinary differences has already been considered in the existing literature (Panaretos and Malesios, 2009: 649). Performance measurements based on citation counts cannot be straightforwardly compared within the context of disparate research domains (Simko, 2015: 2) considering that the h-index varies by field in the following manner: life scientists top out at 200, physicists at 100 and social scientists at 20–30 (Hicks et al., 2015: 431). Panaretos and Malesios present a compelling argument against the improper use of citation metrics, as the sole criterion for evaluating research quality. Instead, they advocate for a more comprehensive approach that incorporates additional factors, such as editorial board membership, awards, invitations, and peer reviews to assess the quality of scientists, journals, and academic disciplines (Panaretos and Malesios, 2009: 639). Hence, three main perspectives on the scientometrics/peer review debate can be distinguished: those who advocate for maintaining the status quo - regarding scientometrics as a highly functional and accurate instrument; those who support the implementation of valuable elements pertaining to both spheres and those who endorse the transition towards exclusive qualitative analysis. Although the mentioned arguments have a strong basis, there has

been a recent shift in focus towards the negative effects of scientometrics and the necessity for an immediate solution, which essentially lies in qualitative means of research assessment. There is a direct link between scientometrics and the materialization of the Matthew effect. Wawer is one of the scholars who argues that one of the most prevalent side-effects to the practice of citation consists of the Matthew Effect (Wawer, 2019: 38). Firstly, it is important to acknowledge that while the “rich-get-richer” process is a significant factor in the general evolution of inequalities within networks, there is a need to understand why the mobility of papers within the citation network, driven by advancements in research, is constrained (Varga, 2022: 3). As Robert Merton famously posits, high-status works and actors tend to receive greater recognition than lower-status ones for products of comparable quality (Teplitskiy et al., 2022: 1). An examination of the experiences reported by eminent scientists reveals that this pattern of recognition, skewed in favour of the established scientist, is evident principally in two instances: in cases of collaboration and in cases of independent multiple discoveries made by scientists of distinctly different rank (Merton, 1968: 57). The matter of attaining a public identity within the sphere of science may be further weighted down by the significant rise in the number of papers written by multiple authors. This phenomenon often causes that the contributions of younger collaborators are less noteworthy, overshadowed by the reputation and achievements of their more established co-authors (Merton, 1968: 58). At the same time, more prolific authors hold the potential to bring a paper out of obscurity. However, when viewed through the lens of its implications for the communication system, the Matthew effect may, in instances of collaboration and multiple discoveries, serve to enhance the visibility of new scientific communications and communicators (Merton, 1968: 59). Under these circumstances, which is the lesser evil?

The following section will address the most ubiquitous scientometrics mechanisms, namely the h-index, introduced in 2005, the impact factor, developed by Eugene Garfield in 1963 and the journal ranking, which stems from Garfield's discovery. Hirsh introduced the h-index in part to address the issue of a small number of highly cited papers, which may not be representative of an individual's contributions if they are a co-author on many of those papers (Teplitskiy et al., 2022: 10). When referring to the second mechanism, Panaretos and Malesios, consider that it is now common practice to use the well-established impact factors as the standard measure of journal quality (Panaretos and Malesios, 2009: 650). It is erroneous to assume that common practice is an absolute indicator of the right course of action. The preceding instruments are primarily quantitative means of assessment, thus being unable to reflect a “scientist's intrinsic creativity” (Wu et al., 2022: 14). There are numerous negative ramifications of the employment of these processes. Absent reform of the scholarly publication apparatus, the motivational forces associated with intensified pressure to publish in high-ranking journals will persist in prompting scholars to exercise less caution in their assertions in an effort to market their research to top journals. Furthermore, given that journal rank informs the appointment and promotion policies of research institutions, the recent surge in misconduct may be indicative of a more pervasive issue. It is plausible that, over the past few decades, research entities worldwide have recruited and advanced scientists versed in marketing their work to top journals but lacking in equal proficiency in conducting their research. The reviewed literature in Brembs' article collectively indicates that the utilization of journal ranks is an ineffective and unscientific practice (Brembs et al., 2013: 7). This means that authors employ journal ranking as a criterion when selecting where to submit their articles. This results in the predominant submission of well-performing studies, yielding groundbreaking discoveries (with general implications) to high-ranking journals. This would not necessarily be a problem if other factors, like the pressure to publish preferably positive results in high-ranking journals had not arisen, forasmuch as it has the potential to result in a decline in moral standards and an increase in publication bias in highly cutthroat domains (Brembs et al., 2013: 4). A focus on top papers in literature consumption may result in inflexible scholarly communication, which could impede competition and impact research efficiency (Varga, 2022: 1). Hence, it can be argued that publications in high-ranking journals are more likely to be subjected to fraudulence than articles in lower-ranking journals, and also more prone to presenting findings that are less dependable (Brembs et al., 2013).

Returning to scientometrics mechanisms, the h-index is susceptible to several biases and shortcomings, such as self-citation and the already discussed Matthew effect (Gomez et al., 2022: 927). It would be erroneous to consider citations as the sole arbiter for success in science. Nevertheless, the empirical evidence suggests that they continue to exert a disproportionate influence as a metric. The number of

citations is a measure of impact. It is evident that the h-index cannot be interpreted as a direct measure of quality (Wawer, 2019: 38). The practice of self-citation, another negative ramification of scientometrics is thoroughly addressed in Bartneck and Kokkermans' article entitled "Detecting h-index manipulation through self-citation" (Bartneck and Kokkermans, 2011). They have established that authors can noticeably enhance their h-index, and potentially even other bibliometric indices, by employing a strategic approach that involves incorporating their own prior publications in their citations (Bartneck and Kokkermans, 2011: 96). Within this article, it has been concluded that the potential inflation of bibliometric indicators could be considerable, given that up to 36% of all citations are self-citations (Bartneck and Kokkermans, 2011: 86). Thus, authors can significantly inflate their h-index through self-citations. Panaretos and Malesios argue that the impact of self-citations is typically inconsequential in the h-values of researchers who have attained a level of maturity in their careers. However, it is not insignificant in the case of young researchers with limited citation outputs (Panaretos and Malesios, 2009: 654). Nevertheless, it would be beneficial to differentiate between authors who cite their previous work to elucidate the relationship with the paper in question and authors who strategically cite their own papers, even if they are not directly pertinent to the current paper. Another negative aspect disclosed is that female scientists have a lower h-index than their male counterparts (Panaretos and Malesios, 2009: 656). It can be observed that gender inequalities are pervasive in all aspects of society, even in the more cultivated and enlightened academic environment. This segment of the article discussed the adverse consequences of utilising scientometrics. In sum, among the negative implications that have resurfaced include the Matthew effect, the dominance of English-language publications, the lack of equity in science, the proliferation of low-impact papers, the fabrication of results, and fragmented research publication to boost citation numbers.

THE CHRONOLOGY OF CHALLENGING THE NORM OF SCIENTOMETRICS

In the previous subsection, the various inputs from scholars regarding the limits and drawback of scientometrics were discussed. The following segment explores the programming documents that were adopted within the global scientific environment in order to shift the assessment of research towards a more qualitative approach. Scholars have been studying how academic research success is determined for well over 50 years, but we can date the beginning of the research evaluation controversy to the 1980s, when rising research expenditures led to a significant growth of the teaching workforce. A major interest in bibliometrics, research integrity and meta-research emerged at the beginning of the twenty-first century (Bonn and Bouter, 2021: 444). The Research Assessment Exercise (RAE) is a series of documents adopted by the UK in 1986, 1989, 1992, 1996, 2001 and 2008. They establish a systematic way of assessing the value of research. Then, in 2014, the UK inaugurated the Research Excellence Framework, which was largely based on peer review, hence succeeding RAE. In British outlook, the process of peer review "should be the gold standard for research assessment" and "should be retained as the primary mechanism for assessing research quality" (Kenna et al., 2017: 2). The San Francisco Declaration on Research Assessments, also known as The DORA Declaration (2012), The Metric Tide (2015), and the Leiden Manifesto (2015), were among the first documents to address and raise awareness on the deficiencies of the existing research assessment system (Bonn and Bouter, 2023: 444). This groundbreaking action was followed by position statements from many groups and organisations that broadened the issue to include research climate, research careers and research integrity. As a result, it is appropriate to conclude that the conversation around research assessment has gained significant traction and that significant changes are in the works (Bonn and Bouter, 2023: 444). The DORA Declaration argues that the evaluation of scientific productivity needs to be transparent and explicit, while strongly opposing the impact factor's use in individual research assessments. It also advocates for the consideration of value and impact pertaining to all research outputs. Furthermore, The Metrics Tide and the Leiden Manifesto pledge to create and adopt more accountable, just, transparent and overall, more appropriate metrics (Bonn and Bouter, 2023: 446). An important further contribution to drawing attention to the shortcomings of commonly used quantitative research metrics are the Hong Kong Principles for Assessing Researchers, adopted in 2019. Similar efforts to improve research assessments and indicators were undertaken through the Helsinki Initiative, launched in 2019, and the European Commission's Horizon 2020 Open Science Policy Platform, which encompasses expert

groups and aims to improve the current situation in research assessment. In addition, the European Commission's "Towards 2030" vision statement advocates for an upgrade of the outdated ranking methods used to assess university performance (Bonn and Bouter, 2023: 462). These programming documents were also mentioned in CoARA's Agreement on reforming research assessment (COARA, 2022: 19) (henceforth, the Agreement) and constitute fundamental groundwork for ensuring the reform towards qualitative research assessment. It is expected that, by the end of 2027, or within 5 years from the signing, every signatory will have completed a reforming cycle. It can thus be argued that the move towards qualitative research assessment has been the result of coordinated efforts among individual scholars, institutional endeavours and their respective programming documents.

THE ROLE OF NORM ENTREPRENEURS IN THE RESEARCH ASSESSMENT REFORM

The most prevalent institutional bodies which advocate for the reform, namely CoARA and the ERC (European Research Council), implicitly also militate for the overhaul of the status quo, hence turning into norm entrepreneurs. CoARA repudiates the present context, primarily shaped by the norm of scientometrics, by emphasizing the unassailable importance of qualitative processes pertaining to research assessment. The ERC employs the qualitative research assessment promoted by CoARA for the prioritization of research excellence, the preferred norm in the detriment of the *juste retour* principle – the latter prevailing for a long time in the European research funding environment. The issue of social norms has become a pervasive topic of interest within the field of political science. Nevertheless, a number of significant inquiries persist regarding the emergence and evolution of social norms (Hoffmann, 2003: 1). The notion of norm entrepreneurs retains its fundamentality within the theoretical framework of norm construction. It is crucial to recognize the complexity of the norm construction process, which encompasses a multitude of elements. These key components are enacted by the exertions of norm entrepreneurs, who possess a keen understanding of the desired standards of conduct. The emergence of a norm is dependent upon the persuasive capacity of norm entrepreneurs. They are engaged in an ongoing endeavour to ascertain the willingness of significant international actors, predominantly states, to embrace novel norms (Finnemore and Sikkink, 1998: 895). The status of a norm entrepreneur is applied to entities who engage in the process of advocating for normative change. Following argumentative discourse, new norms may reinforce existing norms, introduce minor alterations, or result in their complete replacement. In any case, the product resulting from the aforementioned process would invariably exhibit a set of distinctive characteristics from the previous status-quo (Bloomfield, 2016: 310). In their programmatic documents, namely CoARA's Agreement (COARA, 2022) and ERC's update on the Evaluation of research proposal: the why and what of the ERC's recent changes (Leptin, 2024), both entities underline the necessity to overhaul current research assessment practices in order to embrace a more qualitative lens. They argue that peer review should be the central means of research evaluation, considering that it encapsulates the ability to better determine the accuracy of the results and the manner in which they contribute to the expansion of knowledge. The ERC brings together 90 peer review panels, specifically: 28 each for Starting, Consolidator and Advanced Grants, five for Synergy Grants, and one for Proof-of-Concept Grants, which gather every year to determine the final ranking of proposals submitted to their respective panels (Leptin, 2024: 11). This process of assessment constitutes a definite proof of ERC's commitment to enabling and bringing forward peer review. Given that both CoARA and the ERC advocate for a transition towards peer review as the primary qualitative metric for research assessment, which challenges the established order based on scientometrics, they can be conceptualized as norm entrepreneurs.

A COMPARISON OF SCIENTOMETRICS AND PEER REVIEW

Although scientometrics is a widely recognized research assessment method, there is an increasing accord within the scientific environment that qualitative research assessment techniques should gain more prominence. Qualitative research assessment methods are more proficient in identifying and revealing research excellence. Some scholars have concluded that the field of scientometrics is obsolete and has various shortcomings in research assessment, hence the imperative to replace it with qualitative means of assessment. It is indisputable that both scientometrics and peer review have advantages and

disadvantages. Nevertheless, the latter is more desirable for conducting research assessment, considering that it employs expert judgement when carrying out content evaluation, hence being capable of detecting errors and ensuring a contextual understanding. It is indeed a thorough and lengthy process dependent on the subjectivity of the reviewer, but it compensates for the citation bias and the improper imposition of quantity over quality, both specific to scientometrics.

It is important to also acknowledge the limitations of the peer review process. While it is a more reliable method, it still has some drawbacks. Firstly, there is no common format for peer review reports (Ruano-Ravina et al., 2023: 129). This determines a lack of homogeneity, given that all journals should preserve the quality and reproducibility of the manuscripts they publish. Some journals have guidelines for reviewers, but they tend to be vague and non-compliant to a standard format. It is widely acknowledged that there is significant heterogeneity between different reviews of the same paper, and that the differing perspectives can be challenging to reconcile. While expert-based evaluations are typically regarded as reliable, the process is time-consuming and susceptible to random factors, such as the selection of experts (Simko, 2015: 2). Undeniably, most shortcomings pertaining to peer review derive from the subjectivity of the reviewer, which is, after all, inherent to human nature. Michel Lamont refers to the concept of homophily, meaning “an appreciation for work that most resembles one’s own” (Lamont, 2009: 8) when discussing the limitations of peer review. Furthermore, it can be assumed that high heterogeneity exists in the citation process and in peer review. This is an inherently subjective process, and it is therefore difficult to ascertain the truth. It is rather surprising that no form of standardization of peer reviews has been implemented yet, especially considering that attempts to homogenize research communication and quality were made in recent years. (Ruano-Ravina et al., 2023: 129).

Despite the prevailing view among scholars that peer review is the superior method of evaluation, there are also numerous authors who advocate for the use of scientometrics and the conservation of the established paradigm. It is essential to consider the arguments presented by Abramo so as to gain a comprehensive understanding of the subject. Undoubtedly, the process of peer review is constrained by a number of limitations. It is an inherently biased and a time-consuming process. In 2020, it was revealed that reviewers devoted over 100 million hours to peer reviews for journals exclusively, which is the estimated equivalent of over 15 thousand years. Furthermore, peer review frequently fails to adequately acknowledge the researcher’s contribution to each work. For instance, a work co-authored with numerous other individuals must be considered in a different light in the final evaluation versus a single-authored work (Abramo, 2024: 5). The time and financial constraints associated with peer-review evaluations at a certain scale hinder their timeliness. It is paramount to acknowledge that a standard national peer-review assessment process takes approximately two to three years from start to finish, which severely restricts its effectiveness for efficient research management and policymaking. In contrast, scientometric performance assessments can be updated daily if necessary and completed within a few weeks, all at a significantly lower cost (Abramo, 2024: 6).

On the other hand, the ones who argue that the current evaluation process is unreliable and obsolete, consider that the focus from metrics such as the number of publications in high-impact journals and citations, should indubitably shift (Abramo, 2024: 1). In light of the contrasting perspectives on peer review and scientometric assessment, as highlighted by CoARA, those responsible for determining research evaluation methodologies may be facing a challenging task (Abramo, 2024: 1). CoARA emphasizes the necessity to abandon inappropriate uses in research assessment of journal- and publication-based metrics, in particular the inappropriate uses of Journal Impact Factor and h-index (CoARA, 2022: 10). As Giovanni Abramo - an otherwise fervent proponent of scientometrics - notes, peer review represents the conventional and established methodology for the qualitative assessment of research. Peer review remains the sole option in specific contexts. It is essential in fields like the arts and humanities, where bibliographic repositories lack sufficient coverage to ensure a reliable quantitative evaluation of researchers and research organizations and in national research systems where a significant portion of research works is not indexed in bibliographic chronicles. Moreover, peer review is imperative in instances where recruitment and career advancement evaluations necessitate an assessment of essential aspects of research accomplishments that extend beyond mere output, while evaluative scientometrics can only serve a supporting role. (Abramo, 2024: 3). Those who advocate for impact-based assessments contend

that the scientometric approach is more valid than peer review (Abramo, 2024: 5). According to Abramo, scientometric studies lead to more accurate and cost-effective ways of evaluating research and responding to users' needs (Abramo, 2024: 6). Nevertheless, there are scholars who posit that evaluation is mostly led by the data, not by judgement - an unassailable predicament (Hicks et al., 2015: 429). Perhaps the most logical subsequent step would be to determine how to employ peer review, scientometrics, or a combination of both methodologies, in order to best favour the process of research assessment.

In her work, entitled "How Professors Think: Inside the Curious World of Academic Judgment" (Lamont, 2009) Michele Lamont asserts that research excellence is primarily identified through the process of peer review. A further significant discrepancy is that scientometricians can only evaluate indexed publications and peers are able to assess all forms of research, including both indexed and non-indexed works (Abramo, 2024: 4). Hicks mentions that reading and judging a researcher's work is far more suitable than relying on one number. When comparing large numbers of researchers, it is essential to consider more than just their publication records. An approach that examines an individual's expertise, experience, activities and influence is the best path ahead (Hicks et al., 2015: 431). Raff also asserts that when involved in committees which make funding, hiring, tenure or promotion decisions, assessments must be based on scientific content, not publication metrics (Raff, 2013: 533). All in all, the peer review process is regarded as the gold standard for the assessment of the quality of published scientific research (Ruano-Ravina et al., 2023: 130) and is far more dependable for contributing to the true essence of knowledge expansion.

COARA AS A NORM ENTREPRENEUR

CoARA's Agreement was first laid out in January 2022. More than 350 organizations from over 40 countries took part in this endeavour. The organizations depicted a wide range of positions and backgrounds, including "public and private research funders, universities, research centres, institutes and infrastructures, associations and alliances thereof, national and regional authorities, accreditation and evaluation agencies, learned societies and associations of researchers, and other relevant organizations" (CoARA – Coalition for Advancing Research Assessment). The primary instrument implemented by CoARA in order to facilitate systemic change in research assessment is the establishment of its working groups. Working Groups act as "communities of practice", which encourage collaborative learning. Furthermore, they gravitate their activity around specific topic areas and are based on a bottom-up methodology with voluntary participation from members. In this context, constituents are able to exchange expertise, benefit from each other's experience, work together to improve research evaluation, and support the implementation of member pledges (Working Groups + National Chapters – CoARA, n.d.). CoARA instituted a total of 13 working groups, each overseeing a specific area of expertise, all of which align towards the common goal of reforming research assessment.

The creation of the Coalition for Advancing Research Assessment was a major leap forward for the international research community in improving the assessment of academic research. CoARA was established with the aim of addressing the shortcomings and biases of traditional research assessment procedures. It is a consortium of a number of academic institutions, funding agencies and professional associations. The coalition was born out of a widespread realization that metrics such as citation counts and the journal impact factor, while helpful in certain instances, do not accurately capture the impact and quality of research. To recognize a broader range of research outputs, such as multidisciplinary work, data sharing and contributions to open science, CoARA aims to promote more inclusive and holistic metrics, originating in qualitative evaluation. The Coalition aims to develop a more equitable and efficient system by encouraging collaboration and the dissemination of best practice, which could ultimately ensure the expansion of knowledge. It is important to emphasize that CoARA intends to shift towards a very rigorous qualitative assessment process. Formally, it opposes the substitution of scientometrics' assessments for a disorganized system in which all individuals are considered exceptional and a hierarchy cannot be determined. Although CoARA is a fairly new entity within the international research realm, its discourse reiterates a prevalent idea regarding the research-on-research process, according to which the shift from scientometrics, towards qualitative research assessment is mandatory and cannot be deferred. Considering that CoARA places the peer review process at the core of research assessment measures, challenging the status quo, it can be regarded as a norm entrepreneur. Over 600 organisations, mainly

European, have joined the coalition thus far. CoARA promotes a type of research assessment that recognizes diverse outputs, practices, and activities – desiderata attained through qualitative judgement supported by the responsible use of quantitative indicators (CoARA – Coalition for Advancing Research Assessment, n.d.). The CoARA initiative has sparked reactions from scientometricians and supporters alike. Torres-Salinas, Arroyo-Machado and Robinson-Garcia were unequivocal in their criticism, linking the initiative to “scientometric denialism”. This prompted a robust response from voices that acknowledge the benefits of quantitative metrics, such as Ioannidis and Maniadis (Abramo, 2024: 1). Scientometrics measure scholarly impact through citation analysis (Abramo, 2024: 3). CoARA argues that its vision is clear: the assessment of research, researchers and research organizations must integrate diverse outputs, practices and activities that maximize the quality and impact of research. This requires a primary focus on qualitative judgement, with peer review at its core, and the responsible use of quantitative indicators. This is fundamental for: deciding on whom to recruit, promote or reward, selecting which research proposals to fund, and identifying research units and organizations to support. CoARA wants to drive systemic reform based on common principles within an agreed timeframe. Transfer of expertise and mutual learning will be facilitated (CoARA, 2022: 2). The CoARA position relies on peers for assessment, while GA leans towards evaluative scientometricians (Abramo, 2024: 4). Another key area of consideration for CoARA is a commitment to promoting gender equality, fostering equal opportunities and ensuring inclusiveness. It is essential to strive for a balanced gender representation and regard diversity and inclusivity in a far-reaching manner (CoARA, 2022: 4). Reform must be flexible and adapted by research organizations to acknowledge the diversity of disciplines, the variety of competency areas and talents, the differences between cultures, countries and regions, the diversity of languages used in the communication of research, the diversity of research maturity levels, the assortment of research organizations and their missions, as well as the differences between career stages, ranging from early career to senior (CoARA, 2022: 14).

The metaphor of the “black box” introduced by Bruno Latour in 1987 facilitates a more nuanced understanding of the interplay between “normal science” and “revolutionary science” from the standpoint of scientific products. Those engaged in normal science assume the veracity of existing claims in order to develop further assumptions. Scientific revolutions occur when the next generation of scholars attempts to open the “black box” of sealed claims and challenge them with new ideas or conflicting evidence (Wu et al., 2022: 10). This process and the attainment of scientific excellence is rather facilitated by qualitative research evaluation. Researchers make valuable contributions to science and for the benefit of society. These contributions include diverse outputs beyond journal publications and irrespective of the language in which they are communicated. Practices that contribute to robustness, openness, transparency, and the inclusiveness of research and the research process include peer review, teamwork and collaboration (CoARA, 2022: 5). It is clear that assessment processes relying predominantly on journal- and publication-based metrics result in a “publish or perish” culture that falls short of recognizing diverse approaches and could come at the expense of quality. This dominance can: promote quantity and speed at the expense of quality. These processes lead to poor quality and lack of rigor. They result in the emergence of predatory journals and conferences. They encourage publishing in paywalled journals because of their high impact factors, despite the availability of open access alternatives. They lead to risk aversion because taking risks may reduce the chances of publication. They generate excessive attention to rankings that hinders collaboration. They waste efforts, time and resources through the duplication of work as “negative” findings go largely unreported. Research assessment practices must induce a research culture that recognizes collaboration, openness, and engagement with society, and that provides opportunities for multiple talents (CoARA, 2022: 12). Brembs argues that almost anything is superior to what is happening at the moment (Brembs et al., 2013: 8) – reality predominantly shaped by scientometrics.

Given these considerations, peer review should be at the centre of evaluation methodologies, with a largely qualitative approach to the assessment of fundamental research. One can employ quantitative metrics, but only in appropriate situations. These can be used, for example, to evaluate students, citations, money, and publications. Qualitative indicators should be used for qualitative matters like excellence, quality, value, and effect. At no time is appropriate to employ quantitative indicators for qualitative issues. It can thus be concluded that CoARA embraces the role of a norm entrepreneur by first challenging the existing state of affairs, while also forging a favourable context for the proliferation of qualitative research

assessment methods. CoARA emphasizes the limitations of the current circumstances and takes responsible action for the shift towards research excellence.

ERC'S ADHERENCE TO COARA'S PRINCIPLES

Although ERC represents a research funding body, while CoARA focuses on the overhaul of research assessment, it can be argued that there is a consensus between the two entities regarding the need to shift from the norm of scientometrics towards qualitative assessment processes. The most conspicuous proof is ERC's signing of the Agreement. In the words of Daniel Sarewitz: "Nothing will erode public trust more than a creeping awareness that scientists are unable to live up to the standards they set for themselves" (Brembs et al., 2013: 7). ERC's mission is to stimulate the highest quality research in Europe through competitive funding and to support investigator-driven frontier research in all fields, based on scientific excellence. Recently, ERC's Scientific Council has introduced changes in the evaluation procedures and evaluation forms for the 2024 calls. In July 2021, the ERC endorsed the DORA Declaration and in early 2023 it signed CoARA's Agreement. The Scientific Council shares the concern that current research assessment systems often use inappropriate and narrow methods to assess the quality, performance and impact of research and researchers (Leptin, 2024: 1). In the document entitled: "Evaluation of Research Proposals: The why and what of the ERC's recent changes" it is highlighted that submissions will continue to be evaluated on the sole criterion of scientific excellence: the panels will primarily assess the pioneering nature, ambition and feasibility of the research project. At the same time, panels will assess the intellectual capacity and creativity of the proposer, focusing on the extent to which the proposer has the necessary scientific expertise and capacity to carry out the project successfully (Leptin, 2024: 3). The ERC, as a funding body for frontier research, should maintain the sole criterion of scientific excellence, as legally enshrined in the acts establishing the EU Research and Innovation Framework Programme, and should not move towards the evaluation of economic or societal impact. The employment of evaluation criteria such as economic impact or societal-related repercussions would discriminate against fundamental, curiosity-driven research that may not have an immediate or obvious economic or societal impact but is nevertheless important for scientific progress (Leptin, 2024: 4). The joint ratification of the DORA Declaration by the ERC and CoARA is a noteworthy measure illustrating the institutional alignment between the two entities. Although the DORA Declaration was first formulated and adopted by a confined circle of scientists and evaluators, it has now grown into an agreement with many signatories from a wide range of actors committed to contributing to the transformation of research evaluation (Bonn and Bouter, 2023: 462).

CONCLUDING REMARKS

This paper outlined the limitations and shortcomings of scientometrics, highlighting the main reasoning for opposing this methodology and transitioning towards qualitative research assessment – primarily peer review. By comparing quantitative and qualitative study evaluation techniques, it was possible to determine the manner in which the latter is more conducive to fostering scientific excellence. Norm entrepreneurs, such as CoARA, have been positioned as agents of change in the transition from the scientometrics-dominated landscape, advocating for peer review as the most suitable method for evaluating, identifying and recognizing research excellence. All things considered, the field of scientometrics is beset with numerous negative repercussions, including the proliferation of low-impact papers, the replication of experiments, plagiarism, fabricated results, inequalities in science across the globe, discriminatory interdisciplinary differences, the Matthew effect which further causes the issues of multiple authorship, lack of young researchers' recognition, and the pronounced dominance of English language publications. It further contributes to undermining of the very essence of scientific inquiry, by placing quantity over quality. After conducting a comparison between qualitative and quantitative approaches to research assessment, the balance appears to tilt in favour of the former, especially when following the desideratum of attaining scientific excellence. In this extensive debate, CoARA becomes a norm entrepreneur, by promoting a well-calibrated transition towards qualitative research assessment, primarily conducted by peer review, while also challenging the status quo, defined by scientometrics. Along with the implications pertaining to research governance, the transition towards predominantly

qualitative research assessment also possesses a degree of undeniable relevance for Science Diplomacy, considering that impacts how scientific legitimacy, cognitive agency and international scientific cooperation are established and endorsed at the international level. This endeavour is highly valuable considering that it facilitates knowledge production within an international system that continues to place significant emphasis on the pursuit of strong knowledge-based economies.

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The author discloses that the theoretical framing of this article draws on material from her 2018 bachelor's thesis (Babeş-Bolyai University), in line with COPE guidance on text recycling. No other potential conflict of interest was reported by the author.

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THE ASIAN PIVOT OF ROMAN CATHOLICISM

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Abstract

This paper offers a complicated, bittersweet analysis of the Asian pivot of Roman Catholicism. Catholicism is experiencing a profound sense of estrangement in the West and has initiated a journey toward the East. This century, that has been labelled for good reasons the Asian Century, marks the beginning of this journey, which has an unclear, uncertain destination. Asia in fact may reveal itself to be a hostile new home for Catholicism.

Keywords: Roman Catholicism; Pope Francis; bourgeois Christianity; West; Asia.

INTRODUCTION

When Pope John Paul II was elected, I was in Saint Peter's Square with tens of thousands of people, and I remember the general surprise about the first non-Italian pope in five centuries. Only those unfamiliar with the grip that the Italian Curia maintained on the structure of the Roman Catholic Church (henceforth, Church), including her head, could think that after a Polish pope would come another non-Italian pope to succeed John Paul II.¹ And yet it happened: one pope from Germany succeeded one pope from Poland. And then another from Argentina succeeded the one from Germany. Today, nobody thinks anymore that the pope must be Italian, or European; on the contrary, the successor of Pope Francis is expected to come from Africa or Asia. It is not that Roman Catholicism (henceforth, Catholicism) is becoming global: it was already global centuries ago. It is, to use a theological expression, that the Spirit no longer leads the Church toward the old and recent lands of Christian civilization, Europe and North America, but toward the new lands of evangelization. The Church is no longer extending her influence to the former western colonies of Africa and Asia; she is moving her center of gravity to those ex-colonies. Catholicism is moving east. This is

¹ The Curia is the bureaucracy that administers the practical affairs of the Holy See (the state) and the Roman Catholic Church (the religious institution).

not my guess; it is a statement with papal approval. “The future of the Church is in Asia,” Pope Francis told Philippine Cardinal Tagle in 2015.²

This shift is not only a theological or ecclesiastical phenomenon. As one of the world's largest transnational institutions, the Catholic Church remains a significant actor in global civil society and an interlocutor of states, international organizations, and local communities. The relocation of Catholicism's demographic and pastoral center toward Asia raises broader questions about religion and global politics: the interaction between religious universalism and nationalism, the governance of religious diversity, the regulation of conversion, the place of religion in secular states, and the future of religious diplomacy in an increasingly multipolar world. Understanding whether and how Catholicism becomes Asian is therefore also a way of understanding the changing relationship between religion and political order in the twenty-first century.

The time of the Church is geological; the time of the world is chronological. For this reason, to expect that the Church becomes Asian in the Asian Century is like expecting that the Church should have embraced science in the sixteenth century. The Church has her own times. That said, if the future of the Church is in Asia, the Asian Century is part of a journey that will bring the Church to a new land of promise. This century, that has been labelled for good reasons the Asian Century, may or may not be the era in which Catholicism assumes an Asian face; certainly, it is the century in which this shift from the West to the East will be recognized. If it is recognized, however, the shift necessarily implies not only a migration of the Church and her missiological and theological centers to the East but also a reaction to such a migration in the West. When Constantine moved the capital of the Roman Empire from Rome to Constantinople, he did not know that he was consigning the former to centuries of decadence and the latter to a millennium of splendor. Will it be the same for Catholicism? I use the word ‘reaction’ and not ‘implication’ because I want to signal the active forces that will be liberated in the West rather than a simple, passive implication of an action on the inert body of the West.

My argument is that Catholicism in the West will be busy for the rest of the century disentangling itself from bourgeois Christianity in the same way the Church disentangled herself from her association with the Roman Empire. At the same time, Catholicism in the East will be busy discovering the abysses of its political irrelevance.

In this paper, I counterintuitively start from the West, and then I move to the East. The reason for this unusual path will become clear to the readers in the course of the story.

A few words on terminology: ‘political’ must be understood in general terms, as the role of Christians as individuals and the Church as a social institution in the polis—in the public life. East and West are signposts and do not represent entities. Sometimes I use Christianity for Catholicism, not in the sense that Christianity is the same as Catholicism, but in the sense that Catholicism is part of Christianity. Tradition with a capital T is the apostolic tradition, the primary source of Catholic theology; tradition with a lowercase t refers to lineages or schools of thought. As usual, the Church is female.

THE SITUATION IN THE WEST

The rise of the West, in the sense of Europe and its ex-colonies in Northern America, occurred in parallel with the transformation of the old monarchies into national states. Catholicism had a long, amicable relationship with monarchies and suffered the emergence of national states. The reasons for this suffering

² When Pope Francis made a pastoral visit in the Philippines in 2015, he reportedly said to the Philippine Archbishop Cardinal Luis Antonio Tagle that there was hope for the Church in Asia and that the future of the Church was in Asia.

were many, but they all come down to one single point: the autonomy of the Church. A Church that depends on the state to exercise her spiritual powers is always on the verge of being unable to do so.

The late antiquity and medieval worlds were ruled by a sophisticated relationship between altar and throne so that both received authority from Christ and both operated for the good of Christianity. There was a division of labor in place: the pope was in charge of the sacred matters, the king of the mundane matters. The king was not nonreligious: in fact, he received his legitimation from God through the mediation of the Church. He was not the sovereign of the profane space of society; he was the administrator of the temporal matters, the matters that were not directly sacred and therefore under the jurisdiction of the pope and his priests. The temporal matter was not independent of religion, and it was orientated to a religious end. Eventually, the institute of the kingship was independent from the Church; I say eventually because it really depends on the period considered but surely under the authority of Christ. To use modern terminology, Christ was the authority, and the king was the administrator, in the same way the king of the United Kingdom is the head of the state, and the prime minister governs the country. Similarly, Christ was the head of the Church, which is His body, and the pope was the vicar of Christ, and as such he governed the Church. This political framework that took form in late antiquity was perfected in the early Middle Ages and reached its apex in the high Middle Ages; it began crumbling in the late Middle Ages.

The emergence of the nation-state posed a necessary problem—that of sovereignty. If the national state is not based on Christ, and therefore on the Bible, the Church, and the monarchy, on what it can be based? What is the foundation of the national state, namely, its sovereignty? More or less, the West answered this question by accepting the proposal of the social contract in the forms proposed by Thomas Hobbes, John Locke, and Jean-Jaques Rousseau. The passage from monarchy to democracy, however, took centuries. The Church attempted to slow the process in a variety of ways: first, through an alliance with the remaining emperors and kings of Catholic affiliation (Spain, Portugal, Austria); second through a marriage of convenience with the more conservative, eventually reactionary movements; and finally, through a prudent opening to the moderate wings of the republican movement. All the attempts only postponed the inevitable. Step by step, the Church was ousted from power in most European nations and lost her own state, the Papal States, that had survived one thousand years. Pope Pius IX refused to accept the situation. He did not recognize the loss of papal temporal power, and he described himself as “a prisoner in the Vatican.” Not only her head but the entire Church felt imprisoned in a century to which she was extraneous. The pope and his successor forbade Catholics to enter political life.

The acceptance of the new status quo was slow. It is not that the Church finally reestablished a formal relationship with the Italian state, the same state that in her opinion had depredated the Church from her temporal power, only during fascism. The same happened in Germany: the Church and the German state signed an agreement with Adolf Hitler being the chancellor. The Church was not fascist or national socialist; as a matter of fact, most Catholics were antifascist in Italy and against national socialism in Germany. The same popes, Pius XI and Pius XII, who dealt with the authoritarian regimes in Europe before and during World War II (henceforth, WWII) were adamant in their criticism. The fact is that it was objectively easier for the Church and authoritarian regimes to find middle ground than it was for the Church and liberal regimes.

At the same time, however, Catholic thinkers like Jacques Maritain and Henri de Lubac were developing theories to accommodate a less reluctant Church to get engaged with a less authoritarian state. Their idea, in brief, was that the Church should forget temporal power, both direct and indirect (through a Christian party that is heterodirected by the clergy). It was time for the Church to accept the principle of modern democracy and become part of a pluralistic society. Those Catholic thinkers, however, maintained the point that the Church has her spiritual power to exercise. This spiritual power should be exercised because, and this is the core of the argument, without it, the democratic system falls into nihilism. To put

it differently, democracy, and therefore the nation-state, has a political foundation in the social contract. This political foundation, however, is not equal to a moral foundation. The state has no moral foundation of its own. The Church offers this moral, spiritual foundation. The intellectual work of Maritain and de Lubac was received and approved during the Second Vatican Council.

This argument of the spiritual foundation of the state was articulated in the first half of the twentieth century and can be considered exhausted at this point. It may be that the state has no foundation of its own and that without the spiritual support of the Church, it falls into nihilism. But it seems that late modern societies are fine with being nihilist. Another option recently offered by the French philosopher Chantal Delsol is that late modern societies are repaganizing themselves. In this case, the foundation of the state is spiritual but not Christian. Finally, the sex abuse scandals have burned a great deal of the Church's moral authority. In all these options— nihilism, paganism, and lack of moral authority—Christianity no longer has spiritual power to exercise, and the Church has become irrelevant in the public arena.

The expression “bourgeois Christianity” needs to be defined at this point. But before that, I need to explain the concept of “form of Christianity,” which stands for the historical form that Christianity takes in the different eras. The principle of Incarnation requires that the divine plan for humankind takes historical form. However, the question remains about whether the historical forms of Christianity are one or several. In Catholicism, there are, broadly speaking, two theses: for some, the historical form of Christianity is one, namely the medieval society, the perfect society as it has been called. Accordingly, the efforts of the Church as a social entity and of Christians as individuals is to go back to Christendom, the perfect, medieval Christian society. For others, however, the divine plan for humankind takes different historical forms in different eras. Thus, there was the early Church, the persecuted Church under the Roman Empire, the perfect society of the Middle Ages, and now bourgeois Christianity, the form that Protestant Christianity has taken in modernity and Catholicism in the last couple of centuries.

The disentanglement of Catholicism from bourgeois Christianity stands for the acknowledgment of the end of the bourgeois age. In the same terms that Augustine, in the fifth century, separated the destiny of the declining Roman Empire from that of Christianity and the mundane history of empires and civilization from the sacred history of humankind, the Church today separates her destiny from that of the collapsing democratic regimes that have brought the middle class to power. A long arc of history, initiated with the trading activities of a protobourgeois class in the sixteenth century and celebrated in the seventeenth and eighteenth centuries by artists and authors, reached its peak sometime in the nineteenth century and then entered a crisis. Now one witnesses its end. Bourgeois Christianity, established first in the Protestant states of northern Europe, migrated to North America, celebrated by monumental thinkers like Georg Wilhelm Friedrich Hegel, reluctantly embraced by Catholicism, and fueled by the movements of social gospel and social justice all over the world, comes to an end. The pontificate of Pope Francis can be seen as a kind but firm goodbye, not to the West but to bourgeois Christianity.

And yet, bourgeois Christianity is a polysemic phrase. For some, the statement “the disentanglement of Catholicism from bourgeois Christianity” does not mean the end of the bourgeois age but rather the end of the alliance between the middle class and Christianity. Here the problem is not the crisis of the bourgeois order in the West but the corrupting effects of it on Christianity. The Australian theologian Tracey Rowland has expressed this dissatisfaction with a domesticated Church in the following terms:

Today, for example, it is fashionable to be concerned about the environment, so some Christians are more than happy to talk about the Church's ideas about environmental ethics but they will go very quiet about other Christian teachings. Newman had quite a lot to say about this problem and he called it the tendency of Christians to promote the religion of the world or the religion of the age rather than the undiluted Christianity

of the gospels. The German authors speak of a “bourgeois Christianity”. They do not mean literally a Christianity of middle class people, but a Christianity that is narrowed down to something that won’t challenge the upward social mobility of members of the middle class – a Christianity that won’t cause social embarrassment. (Melbourne Catholic, 2021)

The accommodation of the Church to the middle-class values went too far: it is time—and these are the two options historically available to the Church—to rediscover her evangelic, eventually disturbing mission in the world, or separated herself from the world. The former is the option of the Franciscans in the eleventh century and all the social movements in the nineteenth and twentieth centuries; the latter is the option of the Benedictines in the fifth century. In first approximation, the first option is Pope Francis’s option, the second is Benedict XI’s option.

Whatever the disentanglement of Catholicism from bourgeois Christianity stands for, the end of an era or an alliance, the sense is that of a growing strangeness between Catholicism and the West as such. Whether the Church will be on the move, a pilgrim Church, a Church that continues her journey within history, leaving behind the bourgeois order in the West, or, alternatively, she becomes inconvenient for the status quo or a nation within the nation, so to speak, a spiritual presence or a form of resistance to the corrupting values of an era, needs to be seen. But Catholicism seems no longer at home in the West as the West is these days. An increasing dissatisfaction mounts in the center and in the periphery of Catholicism for a different engagement with the world, or no engagement at all. Catholicism is becoming homeless in the West. Benedict XVI fought a long and unsuccessful intellectual war to convince the European political class to recognize the Christian roots of the old continent. He lost, and Europe found itself with no roots and Catholicism with no home.³ The estrangement between Catholicism and the West is reciprocal.

And yet the readers are advised to jump not to the logical conclusion: Catholicism is leaving the liberal order. This is not what is happening. Here I borrow an argument from Italian philosopher Augusto Del Noce, who anticipated in the 1970s with rare prescience a phenomenon that is now evident to all: the assimilation of communism within the liberal order. (Del Noce, 1978) The end of the Soviet Union and the communist system did not imply the triumph of liberalism, in the terms suggested by American political scientist Francis Fukuyama, but an incorporation of communism within the realm of liberalism. The result, Del Noce explains, is a reciprocal adjustment: a communist-liberal system in which the first brings the Marxian historical materialism, that is, forms of society rise and fall in history, and the second carries the idea of affluent (opulent) society. The combination is cultural relativism and a culture of affluence, or, a hedonistic and individualistic conception of life, completely devoid of transcendent values.

This is more precisely the bourgeois Christianity from which Catholicism needs to disentangle itself to survive. Liberalism is not inherently anti-Christian; it admits the existence of religion and rather applies a politics of containment of religion within certain spaces. Communism is a philosophy of praxis that implies a radical secularization of society and the annihilation of transcendental horizons. The affluent society has defeated the revolution and left it in place only as a form of pure immanentism. At the same time, liberalism has individualized the social spirit of communism and directed it toward mundane, economic satisfaction. The consumer of today’s narcissistic and technocratic society is the direct heir to the defeat of communism, born as a social revolution and degraded to the exaltation of individualistic morality and economic goals.

³ The Charter of Fundamental Rights of the European Union was signed in Nice on December 7, 2000. The charter ignored entirely the Christian roots of Europe.

THE ASIAN PIVOT

The destiny of western Catholicism is to find another way to inhabit the West—another form of western Christianity. I will return to this in the conclusion. This, however, may be a secondary concern for Global Catholicism, that is, Catholicism seen in its geographical wholeness. The main concern is whether Asia can be the new home of Catholicism. As mentioned, the answer to this question will probably take centuries to take form. In the Asian Century, however, one is already able to detect the titanic effort that will be required of the Church to become Asian. Before directly addressing the subject, however, I need to define Global Catholicism.

Christianity prides itself on being a universal religion in the sense that it carries a universal message of redemption: convert to God's love, and you will be saved. At a more practical level, Christianity was already a universal religion in the beginning, at least by the standards of the age. Already in the fifth century, Christianity was spreading from the semidesert islands of Ireland to the almost unknown kingdom of Ethiopia, from the Atlantic coast of Portugal to the eastern lands of the Sasanian Empire. By the eighth century, Christians were in China. The first globalization famously brought Christianity everywhere, in America, Asia, Africa, and Oceania. The second globalization established Catholicism in certain areas of the world, sometimes overlapping with, sometimes different from, those of Protestant Christianity. The twentieth-century globalization has simply mirrored the results of a long familiarity of Catholicism with universality.

Christianity is an Asian religion by birth. True, it turned West almost immediately, using the network of Jewish communities established around the Mediterranean Sea as the immediate vehicle of diffusion of the gospel (the good news). Then the Roman Empire became the logical channel of expansion, moving the new religion even further West. In the Middle East, the belligerent antagonism between the Roman and the Parthian first and then Sasanian Empires did not help the cross-border expansion of Christianity. And yet a rich and large Christian community flourished in the eastern section of the Sasanian Empire. Doctrinal controversies, however, unfortunately cut this Sasanian Christianity off from the rest, to the point that its history got lost and was only recently recovered. The same happened with Christian Ethiopia, geographically separated from the Christian mainstream. The real turning point, however, was the rise of Islam. Historians are still debating whether Islam must be considered responsible for the dechristianization of the Middle East; it is without prejudice, however, that the center of gravity of Christianity has moved West.

This sentence should be contextualized. The Eastern Roman Empire, or Byzantine Empire, was a Greek civilization mostly based in the Middle East. It was a Christian civilization. Therefore, the presence of Christianity in the Middle East persisted for centuries. The slow but unstoppable erosion of the Byzantine Empire and the passage of its territories to the three caliphates that established the Muslim dominance on those lands, however, relegated Christianity to a secondary presence in the public arena. The Christian presence in India dated back to the fifth century. It survived although separated from the mainstream. The Christian mission in China did not last. Christianity expanded east through Moska, and that was an enduring conversion. That said, at the beginning of globalization, Christianity was mostly a European affair.

When Christianity reintroduced itself to India and China, missionaries came together with soldiers and traders. Here I do not want to retell the story of colonialism; great works already exist on the matter. (Mong, 2016; Casanova, 2023) My point is that Christianity was perceived as coming from the outside. To say it better, today two stigmas affect the perception of Catholicism: Catholicism is not simply the religion of the colonial powers; it is also the religion of the West. It is not an Asian religion; it is a recent addendum that remains extraneous to the uniqueness of Asia. One could object that historically, Christianity was an Asian religion, not only because it was born in Asia but because it has been in Asia since

its inception. Of course, it is not history that really matters in this dispute: it is the growing sense of distance in Asian people from what they perceive as foreign.

Although the ecclesiastical cadres of the Church in Asia in the long period between the sixteenth and the nineteenth centuries were westerners, at the beginning of the twentieth century, Pope Pius XI predicted the end of the colonial power. He prompted the Church to develop an indigenous clergy that slowly but decisively replaced the western cadres. When decolonization in Asia erupted immediately after WWII, local bishops already administrated most of the Churches in the Asian countries. This means that when the representatives of Hindu or Buddhist traditions meet the representatives of Catholicism, say, in India, they meet fellow Indians. Regardless, the perception of estrangement remains: in most Asian countries, anti-conversion laws are in place, targeting Catholics in particular. Sometimes the laws are exclusively against Catholics (like in the case of Russia); other times, Catholics share their destiny with other Christian denominations (for example, in Nepal). Finally, sometimes Catholics share legal discrimination with other Christians and with Muslims (for example, in India).

Before discussing the estrangement of Catholicism in Asia, it may be worth emphasizing that Asia is not a homogeneous political or religious space. The conditions under which Catholicism operates vary considerably across the continent. In the Philippines and Timor-Leste, Catholicism constitutes a majority tradition and remains deeply embedded in national life. In South Korea, Catholics participate in a pluralistic democratic environment. In India, the Church confronts growing pressures associated with Hindu nationalism and anti-conversion legislation. In China and Vietnam, Catholic communities negotiate different forms of state supervision and regulation. Therefore, references to Asia in this article should be understood as analytical shorthand for a diverse set of contexts united not by a common political regime or religious culture but by their growing significance for the future of global Catholicism. Yet the diversity of Asian contexts does not preclude discussion of a broader estrangement of Catholicism in Asia. The term does not refer to a uniform political or religious condition shared across the continent. Rather, it points a condition in which Catholicism finds itself detached from its traditional Western civilizational and political foundations while not yet fully integrated into the diverse cultural and political worlds of Asia. The estrangement discussed here is best understood as a form of civilizational and political displacement: Catholicism is increasingly centered in Asia demographically, yet it continues to negotiate its place within social and political contexts that have not historically constituted its primary cultural home.⁴

At least three further comments are necessary to clarify the point of estrangement. First, some indigenous priests and, in general, members of the Catholic laity can go back up to five generations in search of the source of their Catholic identity. Their families have been Catholics for a century or more. The sense of foreignness does not originate from a recent conversion but from the doctrines and practices of a religion that developed such doctrines and practices in a western context. The Mass, for example, has a uniform framework that is applied with some degree of adaptation in every Catholic church on the planet. But, and this is the objection, this framework was initially elaborated in the European Middle Ages, then re-elaborated in western modernity, and finally delivered to Asia. It did not help that when Catholicism landed in Asia during the first globalization, it did not connect with the local forms of Christianity but rather forced them to align with the western models. Thus, Catholicism cannot honestly claim to have premodern origins in Asia.

⁴ The growing importance of Asia for global Catholicism is not merely symbolic. The continent is home to approximately 150 million Catholics, representing around one-tenth of the global Catholic population. The Philippines alone counts nearly 90 million Catholics, making it the third-largest Catholic nation in the world, while substantial Catholic communities are also found in India (approximately 20 million), Vietnam (7 million), and South Korea (6 million). Although Catholics remain a minority in most Asian societies, many Asian churches continue to display significant vitality through patterns of religious participation, vocations, and ecclesial growth. These developments do not imply that the demographic center of Catholicism has shifted entirely to Asia, but they do suggest that the future vitality and global orientation of the Church will be increasingly shaped by Asian realities.

Second, the sense of estrangement is not only perceived by non-Christians; the very same Asian Catholics may feel the same way. The title of a well-researched monograph written by Helle Jukka, *Towards a Truly Catholic and a Truly Asian Church*, captures the phenomenon of double consciousness. (Jukka, 2022) It is the struggle Asian Catholics face to remain true to their Asian identity while conforming to the principles and practices of a religion that they perceive as western. Jukka's book is interesting on many levels, including the fact that he does not collect the complaints of the practitioners or the arguments of the theologians but rather compiles the official documents of the Federation of Asian Bishops' Conferences (FABC). In Jukka's opinion, "The FABC can validly be considered as the most authoritative representative of the Catholic Church in Asia since the time of the inception of the FABC, which took place after Pope Paul VI's 1970 visit to Manila." (Jukka, 2022, p. 3) The book can be interpreted as an entry into the struggles of the institution to match the traditional sources of Catholic faith (Scripture and Tradition) and their magisterial interpretation to the realities of the Asian continent across religions, cultures, and sociopolitical realities, especially poverty.

Third, the anti-conversion laws are usually justified to protect local individuals from forced conversion. In reality, however, the real scope of these laws is to protect local individuals from conversion in return for benefits. Rich missionaries establish themselves in a rural, marginal area of the country and provide medical and dental services free of charge. This can be seen as an indirect form of pressure: the local poor institute a relationship between the material richness of the missionaries and the spiritual power of religion. However, the penal codes that cover the crime of forced conversion are often and intentionally vague so that the boundary between conversion and forced conversion is difficult to draw. Consequently, conversion is not recommended. Whatever the judgment one may harbor on the opportunity of anti-conversion laws, the effect on Catholicism is immense.

Christianity is a missionary religion. Mission, that is, evangelization, is not a character among others of the Church; the Church is missionary by definition. Before leaving this world, Jesus commanded His apostles: "Go into all the world and preach the gospel to all creation" (Mark 16:15). The gospel is salvific: "The one who believes and is baptized will be saved, but the one who refuses to believe will be condemned" (Mark 16:16). The act of refraining Catholics from evangelization is not without precedent in the history of Christianity. For example, Islam enforced those laws in certain periods of its existence. (Sahner, 2018) Of course, the particularity of the present situation is that these laws are informed by states that are officially secular. The Church has already recognized that together with evangelization, dialogue must be pursued. Dialogue is a vehicle of mutual knowledge and ultimately of peace. That said, the missionary impulse is rooted in the very core of Christianity. In theory, dialogue is no substitute for conversion; in practice, anti-conversion laws already force Catholics to avoid proselytism and focus only on dialogue. The adjustment to this new situation requires not only a theological effort, which has been in process for some time but doctrinal adjustments that can change the very nature of Catholicism.

It is clear the tendency of some important states to govern religion. The case of China is well known; India is a secular federal state, but anti-conversion laws are an issue managed at the local state, not federal, level.⁵ The same is occurring in smaller states like Bhutan, Myanmar, and Sri Lanka. In Nepal, secularism was established in 2015, but anti-conversion laws have constitutional legitimacy. The laws can in turn be seen as the tip of the iceberg of a specific condition: the political irrelevance of Catholicism. I showed earlier that political irrelevance is a recent condition for western Catholicism. And yet these notes are written when the president of the United States of America is Catholic and so are other prime ministers and chiefs of states in Europe. The possibility that the same happens in Asia is close to zero. Thus, the political irrelevance of Catholicism in Asia is and will be total.

⁵ In India, anti-conversion laws were instituted in the 1930s and limited to some states "to preserve Hindu religious identity in the face of British missionaries" (Tribuneindia News Service, 2021).

One of the ramifications of the political irrelevance of Catholicism in Asia is persecution. In his book on anti-Christian violence in India, religious scholar Chad Bauman argues that a postsecular framework allows scholars to comprehend Hindu nationalists' mindset, including their double claim that religion cannot be distinguished from politics or Christianity from western secular modernity. (Bauman, 2020) In Bauman's words, "Most Indian Hindu do not naturally perceive a clear distinction between what most Westerns would distinguish as 'the religious' and 'the political.'" (Bauman, 2020, p. 26) He adds that "the construction of Hindutva as normative Hinduism" operates "in competition with Christianity [which is] constructed as part and parcel of the project of Western secular modernity." (Bauman, 2020, p. 20) The first claim allows Hindu nationalists to, among other things, reframe religious proselytism in political terms. The second claim permits them to deny Christians' claim of separation between Christian religion and western modernity. Thus, the Hindu resistance to western modernity is, by default, a resistance to Christianity, and vice versa.

Nationalism is a polysemic word, too. The political forces that work to control religion, like in China, or separate indigenous, majority religions from foreign, minority religions, like in India, and protect the former and disenfranchise the latter, can be interpreted as representing a rising Asian pride. This Asian pride takes several forms, including an intellectual effort to provincialize the West, to paraphrase the title of Indian historian Dipesh Chakrabarty, that is, to contest the western project of universality. (Chakrabarty, 2000) Not only history, but the entire modern apparatus of knowledge cannot be considered a simple application of the western frameworks to nonwestern contexts. Context counts. Although the idea of provincializing the West is an attempt to pluralize modernity and its fields of knowledge, by implication, it is a frontal attack on the western ambition to promote knowledge that has universal significance.

I already mentioned that Asian Catholicism at different levels, including the institutional one, shows signs of frustration caused by the problematic adaptation of western forms of worship, practices, and theological principles within local contexts. I qualified this frustration in terms of an internal discomfort of the Catholic communities in Asia. Behind this discomfort, however, the readers are aware now that a larger trend is at work: the provincialization of western Catholicism is part of a much grander trajectory. Western Catholicism, its Asian critics contend, is built into the very fabric of universal Catholicism. The latter is just another term for the former. A truly Asian Catholicism is a severance from past Catholicism and the edification, from scratch, of a Catholicism in Asia that multiplies the Catholic forms of Incarnation. The idea in itself is in line with the current *Weltanschauung* of diversity and pluralism, but it conflicts with two foundational assumptions of Catholicism. First, the history of Christianity is a continuum that brings the original gospel (good news) to the present day. A new beginning is always a return to the origin and a starting over. Catholicism is a self-reforming, not a revolutionary movement. Second, the universal character of Catholicism is not a derivative of its western origins; on the contrary, the West raises universal calls because it has assimilated the universalist character of the redemptive promise of the revelation. It is Christianity that has a universalistic authority by design. Asian nationalism, in the specific interpretation provided, is a threat to both the value of Catholic Tradition and the universality of the Christian message.

In Europe, the Church was able to build a highly developed altar-throne alliance. Nothing like that is possible in Asia. Catholicism is in need of developing a form of Asian Christianity that is capable of dealing with a situation of political irrelevance. This political irrelevance will be or will be not matched with a hostile environment, like religious (India) or secular (China) nationalism. Another question is the relationship with Asian Islam in the context of global Islam. In the West, Islam is seen as a possible partner in the fight against radical secularism, but in Asia, it can be a partner against Hindu and Buddhist nationalism. However, the dialogue is just in its infancy, and it is worthless to speculate. The form that Catholicism will take in Asia is still unknown for the simple reason that the Church has never been in a situation of total political irrelevance since the celebrated period of the Roman persecutions when Christianity was only practiced by a mere twenty thousand people.

Pope Francis's field hospital project may be an attempt in the direction of a new form of Catholicism. According to the pontiff, "The church needs most today is the ability to heal wounds and to warm the hearts of the faithful; it needs nearness, proximity. I see the church as a field hospital after battle." (Spadaro, 2013) Here the idea is that the Church is out there to serve. On another more recent occasion, Pope Francis argued that "the Church as a 'field hospital,' [is] concerned more with those who suffer than with defending its own interests, taking the risk of novelty, in order to be more faithful to the Gospel." (Wooden, 2022) Basically, the pope is aligning the Church with the poor, marginalized, and powerless. Perhaps aware of the impossibility of an alliance with the political power both in the West and in the East, Pope Francis is moving Catholicism toward a condition of no political power at all.

The option of a poor Church for the poor is embedded in the genetic code of the Church. "For the poor you always have with you," Jesus said to his apostles in the gospel of Mark (16:7). The problem is not doctrinal, but practical. Today, the political irrelevance of Catholicism in Asia is somehow balanced with financial autonomy that is provided through the financial aid that comes from Rome and the other rich centers of western Catholicism. Asian Catholicism is an importer of financial assistance. In turn, this financial assistance is conditional on several elements, including a powerful western Catholicism and its grip on the universal government of the Church. In the absence of one or eventually both conditions, who knows if assistance will continue to be provided.

From a Catholic perspective, the Asian pivot has very little to do either with a long downturn or tendential decline in power of the West or the rise of Asian countries as global superpowers. The Asian pivot is unrelated to globalization and deglobalization, geopolitics, and an alleged, renovated centrality of the Asia continent. It also has nothing to do with the decreasing power of the Church in the West or with potential ecclesiastical aspirations for power in the East. As a matter of fact, it is still unclear if Asia will be the promised land or hell on earth. The Asian pivot is the plastic representation of a centrifugal force within Catholicism. It responds to a sense of growing estrangement from a place that was home and the search for an alternative outside the West. The Asian pivot is about embarking on a journey of self-discovery with themes of taking risks, uncertainty, and discovering one's true home. The expression refers to a millenarian institution that is at a crossroads in her life and is prepared to lose what she has for what she might gain.

The Asian Century is the time for Catholicism to resume the journey and switch from the paradigm that regards the Church as a rock (Matthew 16:18) to another in which Christians reside on earth "as foreigners and strangers" (Leviticus 25:23). This switch, of course, will be both pursued and contrasted within the very same Church, and it can be a success or a failure. There is nothing teleological in the history of Christianity except that the Church is provisional, a twofold spiritual-physical construction that covers the arc between the two comings of the Lord. The Asian Century is the symbol of this journey. In the West, the movement is bringing Catholicism away from bourgeois Christianity. In the East, the movement is introducing Catholicism to an unknown condition of vulnerability. Asia is not a geographical entity but rather the symbol of a change of perspective, or better, the possibility of a change. Whether Asian Catholicism will be a unicum, a constellation of Asian local Churches, or as it is today, an extension of the universal Church, remains to be seen.

I mentioned that the destiny of western Catholicism is to find another form of western Christianity. This statement must be taken with caution. True, western Catholicism must find its way but if history tells us anything, western Catholicism will not find its way separately from eastern Catholicism. In the course of history, models of Catholicism elaborated in the West have been transplanted into the rest of the world. It may be possible that the same will happen in the future, in the case that the center of gravity of Catholicism moves East. At that point, models of Catholicism elaborated in the East will be transplanted into the rest of the world, including the West. Another opinion, however, is that Catholicism will become an archipelago of connected local Churches, each firmly rooted in her community, each in a friendly relationship with her Catholic neighbors. Thus, a South Asian Catholicism will be distinct and yet

united with a Chinese Catholicism and an Arab Catholicism in the same way that a western European Catholicism will be distinct and yet united with an eastern European Catholicism and a North African Catholicism. But this is a subject that goes beyond the limited timeframe of the Asian Century.

CONCLUSIONS

The Asian Century names not a resolution but a displacement. Catholicism appears increasingly estranged from the West, where its public grammar has been absorbed into the exhausted forms of bourgeois Christianity. Asia, in turn, does not offer a simple new home, but a space of vulnerability, constrained visibility, and uncertain reinvention. The Asian pivot is therefore neither decline nor expansion, but the unfolding of a centrifugal movement in which Catholicism is compelled to reimagine its form under conditions it has never previously inhabited.

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THE CABLE, THE CORRIDOR AND THE COSCO PROBLEM: GREECE, IMEC AND THE GEOPOLITICS OF INFRASTRUCTURAL POSITIONING

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Abstract

This article reconstructs Greek foreign-policy behaviour across three interconnected infrastructural files of the post-2022 period: the India–Middle East–Europe Economic Corridor (IMEC) announced at the G20 in September 2023, the GREGY subsea electricity interconnector with Egypt, and the East-to-Med data corridor associated with Saudi Arabia. Together with the suspended EastMed gas pipeline and the long-standing COSCO presence at the Port of Piraeus, these files map a coherent if contested Greek strategy. The article argues that Athens has pursued a strategy of competitive infrastructural positioning, in which the announcement, hosting and political sponsorship of subsea and overland connectivity projects function as a primary instrument of foreign policy rather than as its outcome. The strategy operates across three pillars - transport, energy and digital - and is constrained by three structural conditions: the COSCO presence at Piraeus, the rivalry with Turkey, and the post-October 2023 Eastern Mediterranean crisis. The contribution is conceptual: infrastructural positioning is proposed as a category analytically distinct from infrastructural power, connectivity diplomacy and middle-power forum work, and is specified through a set of observable empirical indicators.

Keywords

Greece; IMEC; submarine cables; infrastructure; connectivity geopolitics; Eastern Mediterranean; EastMed; Piraeus; middle-power diplomacy.

INTRODUCTION

As the New Delhi G20 summit drew to a close on September 9, 2023, eight parties; India, The United States, Saudi Arabia, the UAE, France, Germany, Italy, and the European Union, put their names to a Memorandum of Understanding launching the India-Middle East - Europe Economic Corridor establishing the India, Middle East, Europe Economic Corridor (MoU, 2023). Greece was not a signatory.¹ Within four months the Greek Prime Minister was addressing the Raisina Dialogue in New Delhi to underline the corridor's importance for Athens. Within a further year the Hellenic Ministry of Maritime Affairs was publicly pressing the Chinese state-owned operator of the Port of Piraeus to upgrade the port in anticipation of an IMEC-related role that no formal agreement guaranteed. By early 2026 Greek officials

¹The MoU signatories were India, the United States, Saudi Arabia, the United Arab Emirates, France, Germany, Italy and the European Union (MoU, 2023). Jordan and Israel are transit nodes but not signatories. Greece was not a signatory and is not named in the MoU; its candidacy as a European terminus is a subsequent, and as yet undecided, political claim rather than a textual commitment of the corridor.

were describing the country, simultaneously, as a candidate IMEC European terminus, as the European landfall of an approximately €4 billion subsea electricity interconnector with Egypt, as the western terminus of a data corridor with Saudi Arabia, and as a partner in an Israeli Cypriot revival of the suspended EastMed gas pipeline.

The Greek diplomatic record of the post-2022 period is, in this respect, easy to caricature and difficult to interpret. To an unsympathetic reader it presents the spectacle of a small EU member state attaching itself, often with limited concrete commitment, to every available connectivity initiative in the Eastern Mediterranean. To a sympathetic reader it presents a state with a relatively thin diplomatic apparatus making intelligent use of an irreducible geographic position. Neither reading is satisfactory. The interpretative move advanced here is that Greek behaviour across these files is best understood not as opportunism, and not as straightforward middle-power activism, but as an instance of what the article terms competitive infrastructural positioning.

The article advances three connected arguments. First, the existing analytical vocabulary for the role of infrastructure in foreign policy - infrastructural power in the Mann tradition, connectivity diplomacy in the Khanna tradition, infrastructure studies in the Easterling and Larkin tradition, and middle-power forum work in the Cooper tradition - captures important dimensions of the Greek case but does not, in combination, capture what Athens is actually doing.²

Second, the Greek case calls for a specific concept. Competitive infrastructural positioning denotes the deliberate use of project announcement, hosting and political sponsorship as primary foreign-policy instruments by a middle state confronted with two or more incompatible regional infrastructural architectures. The concept is defined more precisely, and distinguished from its neighbours, in Section 2, where a set of empirical indicators is also proposed so that the strategy can be recognised in practice rather than asserted.

Third, the strategy operates in the Greek case under three structural constraints - the COSCO presence at Piraeus, the rivalry with Turkey, and the post-October 2023 Eastern Mediterranean crisis - whose interaction helps to explain an otherwise puzzling pattern: which projects have advanced, which have stalled, and which have been resurrected.

The article proceeds in seven sections. Section 2 sets out the theoretical framework, the gap in the literature, and the concept's empirical indicators, and includes a short note on sources and method. Section 3 reconstructs IMEC as the central file. Section 4 examines the GREY interconnector. Section 5 turns to the East-to-Med data corridor and the wider question of submarine fibre-optic infrastructure. Section 6 reads the EastMed pipeline as the strategy's most consequential failure and partial revival. Section 7 draws conclusions and indicates, more cautiously, the comparative implications.

FROM INFRASTRUCTURAL POWER TO INFRASTRUCTURAL POSITIONING

The argument builds on three lines of scholarship. The first is the literature on infrastructural power, originating in Mann's distinction between despotic and infrastructural power (Mann, 1984, 2012) and extended in recent work on its foreign-policy applications (Heibach and Taş, 2024). The second is the geographic and political-science literature on connectivity geopolitics, developed in different registers by Khanna (2016), Schindler and Kanai (2021) and the growing literature on the contest between the Belt and Road Initiative and competing initiatives (Russel and Berger, 2020; ECFR, 2025). The third is the anthropology and sociology of infrastructure, drawing on Easterling (2014), Larkin (2013), Anand, Gupta and Appel (2018) and Star's (1999) work on the analytical specificity of infrastructure as a category.

Each of these literatures captures something about the Greek case, but none captures it cleanly. The Mann tradition concerns the state's capacity to penetrate its own society through infrastructural means,

²On the relevant traditions, see Mann (1984, 2012) on infrastructural power; Easterling (2014) and Star (1999) on infrastructure studies; Khanna (2016) and Schindler and Kanai (2021) on connectivity geopolitics; and Carse (2014), Larkin (2013) and Anand, Gupta and Appel (2018) on the anthropology of infrastructure. The intersection of these literatures with foreign-policy analysis remains comparatively underdeveloped.

which is not the question raised by Greek behaviour at the EU–third-country interface. The connectivity-geopolitics literature tends to focus on the great-power architects of connectivity - China through the Belt and Road Initiative, the United States and partners through IMEC and the Partnership for Global Infrastructure and Investment - rather than on the smaller and middle states that host or refuse the resulting projects. The anthropology of infrastructure has produced rich case studies of particular installations but has, with some exceptions, not theorised the diplomatic register in which states announce and re-announce projects whose realisation remains uncertain.

What the Greek case requires is a distinct category. Competitive infrastructural positioning denotes a foreign-policy practice in which a middle state, confronted with two or more incompatible regional infrastructural architectures, uses the announcement, hosting and political sponsorship of connectivity projects as a primary instrument of diplomacy rather than as the outcome of a prior strategic decision. So defined, the concept is more than a relabelling of its neighbours, and it earns its place by explaining what they do not.

It differs from connectivity diplomacy in not assuming that the announcing state intends, or is able, to deliver the project as announced: the announcement and the resulting positioning are themselves the object of the practice, not merely the means to a built corridor. It differs from middle-power forum work (Cooper, Higgott and Nossal, 1993; Patience, 2014) in its material constraints: a middle power can convene a forum at low cost, but it cannot on its own build a 954-kilometre subsea cable, and the diplomatic value of announcing such a cable depends on the cooperation of other parties whose interests are not aligned with its own. And it differs from generic strategic positioning in two specific features: the structural condition of competition between architectures is treated as constitutive rather than incidental, and the practice operates simultaneously across several infrastructure types - transport, energy and digital - read as pillars of a single strategy rather than as separate files.

Two further features should be emphasised. First, the practice is constrained by external conditions over which the announcing state has limited control; in the Greek case these are the COSCO presence at Piraeus, the rivalry with Turkey, and the post-October 2023 regional crisis. Second, the practice produces diplomatic returns whose relationship to physical realisation is asymmetric: announcement reliably produces some return, while realisation produces a larger return but is uncertain and slow. It is this asymmetry, more than any single project, that the concept is designed to capture.

These features can be made operational. The following indicators specify what an observer should look for in order to recognise the strategy in practice, and to distinguish it from ordinary connectivity diplomacy or forum work:

Indicator	What it looks like in the Greek case
1. Sponsorship without capacity	The state lends high-level political sponsorship to projects it can neither finance nor build on its own (e.g. a 954 km subsea cable, a multi-billion-euro pipeline), so that the diplomatic act precedes, and is decoupled from, any material commitment.
2. Simultaneous and sometimes incompatible, attachments	Rather than committing to a single architecture, the state attaches itself to several at once - IMEC, GREGY, the data corridor, EastMed - some of which compete for the same role, funding, or partners.
3. Announcement-led, not delivered led	Diplomatic activity (summits, envoys, joint declarations, EU filings) is intense and continuous while physical progress is slow, contested or absent; the visible output is positioning, not infrastructure.
4. Returns that outlast the project	Bilateral upgrades, alliance formats, and EU funding decisions generated around a project persist after the project itself stalls or fails (most clearly with EastMed).
5. Host, not architect	The state presents itself as an indispensable landing point or terminus - a function of fixed geography - rather than as a designer or financier of the corridor.

The strategy is present, on this account, when several of these indicators co-occur: when diplomatic activity around a project is high while the state's own material contribution and commitment to delivery are low, when the same state sponsors competing or incompatible projects at once, and when the diplomatic returns survive the project's material fate. The remainder of the article applies these indicators to the four files in turn, and is careful, in each case, to separate what is documented from what is reported and what remains speculative.

A note on sources and method

The article reconstructs Greek behaviour from five kinds of source, used for different purposes and weighted accordingly. Primary documents - the IMEC Memorandum of Understanding (2023), the EastMed intergovernmental agreement of January 2020, European Union Projects of Common and Mutual Interest (PCI/PMI) listings, Connecting Europe Facility funding decisions, and the joint declarations of the Greece–Cyprus–Israel summits — establish the formal record of commitments and decisions. Speeches and official statements from Greek and partner-country officials serve as evidence of how the strategy is framed and what intentions lie behind it. Corporate and project-promoter announcements – from the Copelouzou Group / Elica and Saudi Telecom, among others – are drawn on to map the commercial structure involved, though always with the caveat that those making the announcements have their own stake in projecting momentum. Analytical grounding comes from policy reports produced by organisations such as the Atlantic Council and ECFR. Media coverage, for its part, is reserved mainly for developments too recent or too unresolved to have entered the formal record; wherever a claim depends solely on press reporting, or on a single outlet, that dependency is flagged explicitly in the text or accompanying notes. Because many of the developments discussed here are recent, politically sensitive and unresolved, the analysis throughout distinguishes confirmed facts from reported developments and from interpretation and treats 2025–2026 claims with corresponding caution.

IMEC AND THE GREEK BID FOR THE EUROPEAN TERMINUS

The India–Middle East–Europe Economic Corridor, announced at the New Delhi G20 on 9 September 2023, is the most consequential connectivity initiative of the post-2022 period. The corridor envisages two principal segments: a maritime link from the East between India and the Gulf, and a northern overland link from the Arabian Peninsula through Saudi Arabia and Jordan to Israel, with a final maritime leg from Haifa to one or more Mediterranean ports in Europe. The MoU committed signatories to develop transport, energy and digital infrastructure along the corridor; it did not designate a European terminus.

Two facts about IMEC's institutional form are important for the Greek case, and the argument depends on stating them precisely. First, the MoU is a declaration of intent rather than a treaty: as of early 2026 IMEC had no permanent secretariat, no binding implementation mechanism and no formal coordinating body, a gap repeatedly noted by analysts and flagged by the Atlantic Council as a priority for the 2026 G20 process (Shafer and Houssein, 2025). Second, and consequently, no formal decision has designated any European terminus. It is precisely the openness and under-institutionalisation of the corridor that Greece exploits: in the absence of an authoritative allocation of roles, candidacy can be asserted, sponsored and publicised, and the assertion itself yields diplomatic visibility. The argument of this section is therefore not that Greece has secured a role, but that it is using the corridor's indeterminacy to increase its diplomatic visibility.

Three European candidate ports have emerged: Marseille in France, Trieste in Italy, and Piraeus (with Thessaloniki) in Greece. Each has been promoted with characteristic instruments. France appointed a special envoy on IMEC in February 2024, the first signatory state to do so. Italy followed in 2025, pairing its appointment with a stated commitment to integrate Trieste and with a Trieste summit promoting the port as a strategic gateway (Shafer and Houssein, 2025).

Despite being the smallest of these states, Greece has assembled a distinct set of tools of its own: sustained high-level engagement - Prime Minister Mitsotaki's appearance at the Raisina Dialogue in February 2024 being one instance, followed by a series of bilateral summits with India and Israel; a concerted effort to present Piraeus as the natural eastern Mediterranean endpoint; and a deliberate

framing of GREGY and the data corridor as parallel files, offered as proof that Greece can support the corridor's energy and digital dimensions in addition to its transport function. The substantive case rests on three considerations: the scale of Piraeus, for over a decade the largest container port in the eastern Mediterranean; the deepening bilateral relationship with Israel since the IMEC announcement (GIS Reports, 2025); and the symmetrical development of GREGY and the data corridor, which would, if realised, allow Greece to host all three pillars. None of these, it should be stressed, amounts to a secured designation.

Against this stands one well-documented vulnerability: the COSCO presence at Piraeus. The Chinese state-owned shipping group acquired a 51 per cent stake in the Piraeus Port Authority in 2016 and raised it to 67 per cent in 2021, with the remainder held by the Hellenic state and minority shareholders. In January 2025 the US Department of Defense added COSCO to its list of companies it deems linked to the Chinese military,³ producing acute political pressure on Athens to demonstrate that the COSCO presence does not compromise the strategic suitability of Piraeus for an IMEC role. What characterises Greek conduct here structurally is a preference for managing the COSCO problem rather than resolving it outright: pressure on COSCO to invest in upgrade is allowed to build incrementally, while the state's continued minority stake is kept visible in public messaging – all pitched in a register calibrated so that Washington and Beijing can each interpret Athens' position favourably.

Greece's approach to IMEC, then, is best understood as a form of infrastructural positioning conducted, under real constraints: political commitment to the corridor voiced at the highest levels, GREGY and the data corridor deliberately marshalled together as proof of multi-pillar readiness, and the COSCO issue handled as an obstacle to be managed rather than one that forecloses the strategy entirely. The competition for the European terminus remains, at the time of writing, undecided, and the most plausible long-term outcome may be multiple-terminus designation rather than a single winner. The diplomatic returns to Greek positioning are nonetheless already substantial and accrue irrespective of which outcome eventually prevails – which is precisely the point.

THE GREGY INTERCONNECTOR AND THE ENERGY PILLAR

The GREGY subsea electricity interconnector is the most advanced of the Greek files. The idea originated with the Copelouzos Group back in 2008, lay dormant for over a decade, and was brought back to life in the wake of the 2022 energy crisis; Elica Interconnector, a subsidiary of Copelouzos, now leads development in partnership with the two countries' transmission system operators, IPTO/ADMIE on the Greek side and EETC on the Egyptian. The plan calls for a high-voltage direct-current cable running roughly 954 kilometres from Egypt's north-west coast to Attica on the Greek mainland, with a projected capacity of 3,000 megawatts and a price tag most often put at around €4 billion, though estimates diverge. The cable is designed to carry renewable electricity from a planned wind-and-solar portfolio in Egypt of around 9.5 gigawatts. It has been included in the European Union's sixth PCI/PMI list and in the Global Gateway framework, and received €9.6 million from the European Commission in January 2026 for preparatory studies under the Connecting Europe Facility (Ecofin Agency, 2026).

The analytical interest of GREGY lies in keeping four levels distinct, because they overlap in practice but are not identical. The first is the Greek state's strategy: the project has been positioned by the Minister of Environment and Energy as part of "Greece's broader strategy to develop new energy corridors to the North and the South" (Papastavrou, cited in CEEnergyNews, 2025), and the Egyptian President characterised it as a strategic step during a 2025 visit to Athens (cited in EnergyNews, 2025). The second is the private promoter: the project is, and remains, a commercial undertaking led by Copelouzos/Elica, with its own incentives to signal momentum. The third is Egyptian interest, organised around Egypt's ambition to become a renewable-energy exporter and hub. The fourth is EU energy policy, which supplies the PCI/PMI status, the Global Gateway label and CEF funding, and which aligns the project with

³In its January 2025 update to the list maintained under Section 1260H of the FY2021 National Defense Authorization Act, the US Department of Defense added COSCO to its register of "Chinese military companies." The listing carries no direct legal effect on COSCO's operation of Piraeus, but it constrains the political space for IMEC-related public investment in the port (Shafer and Houssein, 2025).

REPowerEU and the Clean Industrial Deal. What is striking in the official framing is its register: a commercial cable is presented as an instrument of state strategy. Thus, the interconnector is, in this register, not the consequence of the bilateral relationship but a medium of it - the analytically relevant point, regardless of whether the cable is ever laid.

Two further features deserve care. First, the project has, since 2024, been considered for an extension splitting the cable south of Crete to route capacity to both Attica and north-western Greece, the latter connecting through the existing Greece–Italy interconnection - a development that would convert a bilateral project into a regional one (EnergyPress, 2024b). Second, GREGY faces domestic competition from the GAP Interconnector, a smaller cable promoted by the Eunice Group and routed to Crete rather than Attica. It is tempting to read the coexistence of two promoters as a deliberate Greek tactic of keeping options open; the evidence does not support so strong a claim. At the PCI/PMI appraisal stage GAP was reported not to have secured letters of support from the Greek state, whereas GREGY received them.⁴ The more defensible reading is therefore narrower: the coexistence of competing private promoters creates opportunities for Greek positioning - Athens can engage publicly with a competitive field without being seen to pick a single national champion - but the state has in fact extended its backing asymmetrically to GREGY. The positioning advantage, then, is genuine, even if the notion of a deliberately cultivated rivalry is not.

GREGY's strategic worth accordingly splits into two parts. Should the project actually be built, it would position Greece as a meaningful transit hub for renewable power originating in North Africa, with the resulting capacity notionally split three ways - domestic consumption, re-export to other EU member states, and green-hydrogen production at home. But even short of realisation, the project generates an ongoing stream of bilateral contact, EU funding rounds, and intergovernmental signalling that functions as a foreign-policy asset in its own right. Thus, the asymmetry between the returns to announcement and the returns to realisation, identified in Section 2, is unusually visible here.

THE EAST-TO-MED DATA CORRIDOR AND THE GEOPOLITICS OF SUBMARINE CABLES

The East-to-Med data corridor, announced in 2022 amid deepening Greek Saudi ties around Crown Prince Mohammed bin Salman's visit to Athens, represents the digital pillar of the strategy. The project is a fibre-optic subsea-and-terrestrial system intended to link Saudi Arabia to Italy through Greece, promoted as a joint venture between Saudi Telecom's MENA Hub and the Greek satellite-applications firm TTSA, with Greece's Public Power Corporation among the parties. Some caution is warranted around the cost figures in circulation: no officially documented budget for the corridor has been firmly established in public sources, and the approximately US\$800 million figure appearing in 2026 coverage in fact pertains to an unrelated Saudi investment in Syria's telecommunications infrastructure rather than to this project. Functionally, the cable is meant to offer a route for data transit between South Asia, the Gulf, and Europe that bypasses the Suez Canal.

The corridor illuminates a broader transformation. The traditional cartography of submarine cables, organised around the Mediterranean and Red Sea chokepoints, has come under pressure since 2023: attacks on Red Sea shipping have produced repeated cable-damage events, including the severance of three Red Sea cables in 2024 that took months to repair, and the global fleet of cable-repair vessels is small and cannot operate safely in an active conflict zone (Rest of World, 2026). The result has been a wave of competing announcements designed to bypass the Red Sea by sea or by land. The most consequential recent development for the Greek file is the reported attempt by Saudi Arabia, disclosed by Middle East Eye in February 2026, to replace Israel with Syria as the corridor's terrestrial transit country.⁵ This is, at the

⁴The GAP (Greece Africa Power) Interconnector, promoted by the Eunice Group, is a separate Egypt–Greece subsea power cable, smaller in capacity (c. 2 GW) and routed to Crete rather than Attica. At the PCI/PMI appraisal stage GAP was reported not to have secured letters of support from the Greek state, whereas GREGY received them; the two are therefore not symmetrically backed competitors (EnergyPress, 2024a).

⁵The reported Syrian rerouting was an exclusive by Middle East Eye (2026) attributed to unnamed regional officials; it had not, at the time of writing, been formalised in the project's documentation, and project materials circulating in late 2025 still showed an Israeli transit. The claim should therefore be treated as reported rather than confirmed. The figure

time of writing, a reported and not a confirmed development; project materials circulating in late 2025 still showed an Israeli transit, and the rerouting had not been formalised. If confirmed, it would constitute a significant change in the project's structure and would place Athens in an awkward position between its Israeli security partnership and its Gulf economic ambitions.

A Greek diplomat described the country, in the announcement period, as the "eastern gateway to the EU for data transfer" (Euronews, 2022). The framing is characteristic of infrastructural positioning: the claim is not to particular volumes but to a structural role in the architecture of data movement, a role that retains diplomatic value irrespective of which specific cable is built.

The strategic significance for Greece extends beyond this single project. Greece has positioned itself through several initiatives that should be distinguished by type and maturity rather than aggregated. These include the Blue-Raman cable systems linking the central Mediterranean to the Gulf and beyond; a succession of hyperscaler commitments of varying kind - ranging from Microsoft's planned data-centre region for Greece to Amazon Web Services' Athens local zone and announced interest from other providers, which are not all "data centres" in the same sense; and proposed regional cable projects such as a GreenMed-type route through the central Mediterranean. The precision matters: a cloud region, a local zone, a connectivity node and a stand-alone data centre are different objects with different strategic weights, and the Greek digital footprint is better described as heterogeneous than as a uniform wave of investment.

Even so qualified, the cumulative effect is real. For the first time, Greece has a substantive presence in the political economy of digital infrastructure, a domain from which it was largely absent in the post-2008 period, and digital connectivity has become a medium of Greek bilateral relations with Saudi Arabia, the United Arab Emirates, India and Israel. Scholarship on submarine cables – running from Starosielski (2015) through to more recent work out of the Oxford Internet Institute (Lehdonvirta and Mikelsaar, 2025) – has tended to frame cable routing as something negotiated between states and corporations. What the Greek case contributes is an additional layer to this picture: diplomatic value from routing decisions does not flow solely to the corporate promoters and great powers whose companies own the cables, but also to smaller states whose geographic position happens to generate landing points. Greece, in this sense, functions less as a designer of digital infrastructure and more as a middle-tier state that converts fixed geography into a place at the negotiating table.

EASTMED: THE STRATEGY'S MOST CONSEQUENTIAL FAILURE

The EastMed gas pipeline is, on the argument advanced here, the most analytically important of the files, because it is the one in which the strategy most clearly produced a substantial diplomatic return while failing to produce the underlying project. The chronology is worth setting out carefully, since the diplomatic afterlife of the project is easily confused with its material history.

Development of the pipeline dates back to the early 2010s, undertaken by IGI Poseidon, a joint venture between Greece's DEPA and Italy's Edison. Under EU Regulation 347/2013 it earned designation as a Project of Common Interest, and Commission-funded studies backed it through the middle of that decade. Then, on 2 January 2020, Greece, Cyprus and Israel signed a trilateral intergovernmental agreement in Athens setting out plans for a pipeline of roughly 1,900 kilometres, running from the Levantine Basin via Cyprus and Crete to mainland Greece, at an estimated cost of €6-7 billion and with completion notionally targeted for 2025. The Israeli cabinet approved the accord in July 2020.

In January 2022 the United States conveyed an informal note (a non-paper) effectively withdrawing diplomatic support, citing the energy transition and environmental concerns, doubts about economic and commercial viability, and the risk of destabilising regional relations.⁶ Greece did not formally abandon the

of roughly US\$800 million that appears in 2026 reporting refers to STC's separate investment in Syrian telecommunications infrastructure and should not be conflated with the East-to-Med corridor's own budget.

⁶The US non-paper of January 2022 was widely reported, including by Greek media, as listing three grounds for the withdrawal of diplomatic support: the energy transition and environmental priorities; doubts about economic and

project, but it ceased to be an object of active diplomatic investment; stakeholders postponed an investment decision in 2024 and shifted attention to smaller interconnectors and existing infrastructure, and by 2025 the pipeline was widely described, even by sympathetic commentators, as effectively shelved (To Vima, 2025). The combination of high cost, US withdrawal, deep-water technical challenges and the EU's decarbonisation trajectory was decisive.

What is analytically significant is that EastMed produced substantial diplomatic returns during the period in which it was pursued, and that those returns have outlasted the project. The trilateral Greece–Cyprus–Israel format - inaugurated in Nicosia in January 2016 - was constructed in significant part around the EastMed file. It is often described as an annual summit, but this is inaccurate: the meetings have in fact occurred irregularly, and the tenth, convened in Jerusalem on 22 December 2025, represented the first leaders' meeting following the events of October 2023 (INSS, 2025; Government of Cyprus, 2025). That December 2025 declaration reaffirmed the parties' commitment to defence and energy cooperation and included a pledge to hold annual leaders' summits going forward. The associated "3+1" format with the United States, also built around the EastMed file, was reactivated at an energy ministerial in Greece in November 2025.

The case therefore supports the asymmetric-returns argument of Section 2. Announcement and political sponsorship produced the durable diplomatic infrastructure of the trilateral and 3+1 formats; realisation, which failed, would have produced an additional return that has not materialised but whose absence has not collapsed the diplomatic structure built around the announcement. The case is also instructive about the second structural constraint, the rivalry with Turkey. Ankara has consistently opposed EastMed, both bilaterally and through its exclusion from the East Mediterranean Gas Forum, and has used the project's suspension to demonstrate its own centrality to any eastern Mediterranean energy architecture. The Greek response has been to keep the EastMed file diplomatically active even when the underlying project is dormant — on the defensible logic that the returns to the file are not exhausted by its physical realisation.

The October 2023 Gaza war has reconfigured the file in ways still unfolding. The combination of Turkish trade measures against Israel in 2024 and the cooling of US support for Israeli energy infrastructure during the active conflict has, paradoxically, accompanied a partial revival of EastMed-related diplomacy at the rhetorical level, with discussion in the renewed 3+1 setting of a "new EastMed" configuration centred on smaller interconnectors, LNG terminals and Greek-routed export infrastructure. The underlying logic of competitive infrastructural positioning is, in this revised configuration, more visible than ever: the announcement and re-announcement of energy-connectivity infrastructure functions, irrespective of physical realisation, as a medium of the bilateral relationships that organise Greek policy in the region.

CONCLUSIONS AND COMPARATIVE IMPLICATIONS

Greek foreign policy across the four interconnected files of the post-2022 period — IMEC, GREGY, the East-to-Med data corridor and EastMed — is best understood as an instance of competitive infrastructural positioning. The strategy operates across transport, energy and digital pillars; produces diplomatic returns asymmetric to physical realisation; and is constrained by the COSCO presence at Piraeus, the rivalry with Turkey and the post-October 2023 crisis. It is neither connectivity diplomacy in the great-power sense nor middle-power forum work in the Cooper sense, but a third category, recognisable through the indicators set out in Section 2.

Three implications follow, stated here as a research agenda rather than as established findings. First, the category is not specific to Greece. It should, in principle, travel to other middle and regional states positioned on one or more of these architectures — Italy at the western terminus, Egypt and Cyprus on the energy and digital files, Jordan as an overland transit, and, with adjustment for scale, the Gulf states at the eastern end. Whether it does travel, and under what conditions the strategy becomes available and

commercial viability; and the risk of regional tensions (Bilirakis and Malliotakis, 2022). Technical and commercial obstacles were already significant before the reversal.

effective, is an empirical question for comparative work; the category clarifies what to look for rather than predicting success.

Second, the density of overlapping initiatives in the post-2022 Eastern Mediterranean — IMEC, competing subsea interconnectors, multiple fibre-optic corridors, the residual EastMed configuration, the Turkish-favoured Development Road, and the established Belt and Road presence through Piraeus — is itself a structural condition. It creates openings for middle-state positioning that did not exist under single-architecture dominance. Competitive infrastructural positioning is, in this sense, partly a function of infrastructural multipolarity.

Third, and most generally, the literature on infrastructure in international relations has organised its attention either at the level of great-power architects or at the level of specific installations. The intermediate level — the middle state that hosts, refuses or partially absorbs such initiatives — remains comparatively under-theorised. The Greek case is a clear instance of that level. Greece has built none of the major infrastructure under examination; the states and institutions behind IMEC, the data corridor and the abandoned EastMed pipeline are India, the United States, Saudi Arabia, the United Arab Emirates, Israel and the European Union. Yet the diplomatic dividends — measured in bilateral relationships, EU funding flows and the consolidation of alliance formats — have accrued disproportionately to Athens. The explanation lies less in any Greek capacity to deliver projects than in the disciplined use of a fixed geographic position through which these architectures must, by necessity, pass. Greece's role has not been to build the routes, but to occupy the crossing.

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LAYERED BUT ASYNCHRONOUS: EU REGULATION AND THE UNEVEN TIMING OF WORKER PROTECTION UNDER ALGORITHMIC MANAGEMENT

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Abstract

The European Union has created a multi-layered system of regulation concerning algorithmic management via the General Data Protection Regulation, the AI Act, the Platform Work Directive and an additional layer which is still being developed. This article examines how this system allocates protection among different types of workers and looks at how Regulation (EU) 2026/1744 changed the timeline of this regulatory structure. Using historical-institutionalist approaches to the concept of layering and drawing on the literature about EU political time, it introduces the idea of asynchronous regulatory protection as a way of understanding the relationship between the timing of regulations and the scope that they cover. A seven-dimensional grid is applied at a single point in time, 2 August 2026. The main finding relates to the sequence of events at the Union level: prior to the amendment, the AI Act's binding duty to provide employment-specific information was set to come into force four months before the transposition deadline for the Platform Work Directive; following the amendment, it is now set to come into force twelve months after that deadline. The analysis also shows that material and personal scope are to some extent nested and reveals intra-layer temporal decoupling within the AI Act. Regulatory timing becomes distributed when the various layers of regulation differ in terms of what they protect and who they protect.

Keywords : algorithmic management; asynchronous regulatory protection; AI Act; Platform Work Directive; regulatory layering

1. INTRODUCTION

The general provisions of the EU Artificial Intelligence Act came into application on 2 August 2026. Six days before that, Regulation (EU) 2026/1744 had shifted the high-risk employment regime from 2 August 2026 to 2 December 2027. The Platform Work Directive stayed on a transposition deadline of 2 December 2026, and at the same time the Commission launched the second-phase consultation on a Quality Jobs Act on 20 July 2026. Under all these more recent developments, the General Data Protection Regulation remained in force, even though Article 22 was already the subject of a pending amendment proposal. On that date, the architecture could thus be seen as being applicable, deferred, in the process of being transposed and still undergoing legislative development.

The coincidence is the puzzle that this article addresses. Within less than ten years the EU has established a dense set of rules concerning automated recruitment, allocation, monitoring, evaluation and termination. Nevertheless, this regulatory density has not resulted in the same level of protection for all functions, groups of people or over time. The article therefore investigates how the EU's multi-layered regulatory framework

allocates protection against algorithmic management among different categories of workers, and in what way the 2026 amendment to the AI Act changed the temporal arrangement of that framework without altering its multi-layered nature.

The main argument of the article is that these differences have a distributive character. It is normal for the various dates of application to occur in a multilevel legal system; what is important in this case is the way in which these differ in both the personal and material scope. Regulatory protection becomes distributive when the various regulatory layers protect different things and different groups of people. As a result, a change of calendar in one layer can modify the relative regulatory position of the categories which rely on different layers. The article refers to this situation as asynchronous regulatory protection and its most obvious empirical manifestation is not the date on which each worker in each Member State acquires effective protection, but rather a reversal of the nominal, Union-level sequence of the two regulatory trajectories.

The study intentionally sets limits on its scope. While scholarship on European studies has looked at temporal differentiation among institutions, Member States, policies, and sectors, and labour-law scholarship has carried out extensive analysis of the personal scope of worker protection as well as the substantive gaps associated with algorithmic management, the present contribution seeks to bring these issues together by focusing on the interaction between regulatory timing and personal scope and investigating how the sequence of regulations leads to the distribution of protection gaps among different categories within the same legal system. The framework includes a descriptive material aspect – that is, what is protected – and two further propositions relating to who is protected and when protection applies.

The method involves the analysis of documents, employing a longitudinal approach when reconstructing the timeline and a cross-sectional one when making comparisons. The article selects 2 August 2026 as its common point of observation since this is the one moment within the regulatory sequence at which the various layers are simultaneously visible in distinct states of applicability, deferral, transposition and legislative development. A seven-dimensional grid is used to distinguish between the parties who have obligations and those who are protected; instead of assigning each instrument a single date, it notes its position along a trajectory.

Section 2 develops the framework; in Section 3 presents the corpus and method; Sections 4 and 5 put the matrix and timeline into practice; Section 6 discusses the implications for layering, political time and work that is mediated digitally; and Section 7 ends by addressing the challenges posed by the 2026–2027 regulatory timetable.

2. REGULATORY LAYERING AND ASYNCHRONOUS PROTECTION

2.1 Algorithmic management as a regulatory problem

Algorithmic management means the use of automated systems to direct, evaluate and discipline workers, a set of practices first documented in platform work and now spreading into conventional employment (Wood, 2021). Management scholarship regards it as a mode of organisational control in which algorithms take over functions previously exercised by human managers (Kellogg et al., 2020), but also as a sociotechnical arrangement that reshapes power, roles and information flows inside organisations (Jarrahi et al., 2021). The Joint Research Centre offers a narrower working definition, the use of computer-programmed procedures for the coordination of labour input in an organisation, and stresses that the phenomenon is not confined to digital labour platforms alone (Baiocco et al., 2022). Human resource management research treats it as a distinct research agenda for employment relations (Duggan et al., 2020).

From the perspective of the European institutions, it can be observed that in its December 2025 legislative-initiative resolution, the European Parliament describes algorithmic management as the use of automated systems to monitor, supervise, evaluate or make or support decisions regarding work performance and working conditions, covering both surveillance of the work environment and decisions with significant effects on the persons concerned (European Parliament, 2025). The definition cited here is adopted since it is the one against which the various instruments under examination are drafted and assessed. That aspect involving the personal dimension, however, is disputed, as the preparatory documents also referred to the self-employed working alone, whereas the directive limited its application to workers and employers within the EU, on account of the constraints imposed by the social-policy legal basis in Article 153 TFEU. This

limitation is not merely incidental to the present article; it represents an early example of the kind of distinction between personal scopes that the framework is intended to address.

If it is defined in this way, algorithmic management cannot be assigned to any one legal instrument. Data protection law was the first to deal with automated decisions concerning individuals, specifically through Article 22 of the General Data Protection Regulation (Abraha, 2023). The Artificial Intelligence Act introduced a broad, product-safety-oriented framework which regards the use of algorithms in employment as high-risk without establishing any rights that are specific to workers (Veale & Zuiderveen Borgesius, 2021; Adams-Prassl, 2022). The Platform Work Directive included the first dedicated chapter on algorithmic management, but this chapter only applies to people who carry out platform work. Labour-law scholarship has pointed out what still remains inadequately addressed by this combination of measures: information asymmetries and the decline of human agency (Adams-Prassl et al., 2023), psychosocial risks (Cefaliello et al., 2023), and the lack of employment-specific safeguards in the AI Act (Wright, 2025). The regulatory focus is therefore on a range of overlapping legislative measures, and the issue to be analysed is how this field is constructed and how different workers end up benefiting from the protections it provides.

2.2 Regulatory layering and gradual institutional change

In order to explain how this field has been developed, the terminology provided by the historical-institutionalist literature on gradual change will be used. Streeck and Thelen (2005) identify four modes of gradual institutional change, one of which is known as layering, this referring to the introduction of new rules which either overlap with or stand alongside the existing ones without formally abolishing the old. Mahoney and Thelen (2010) build on this by proposing a theory of change based on ambiguity, agency, and power, according to which layering is preferred when the defenders of the status quo are able to prevent replacement but not the addition of new rules. Layering is therefore not a synonym for accumulation; it involves three conditions: new arrangements are added to the existing ones, the existing arrangements are not replaced, and the addition changes the overall effects through the interaction between the old and the new rules.

The EU's regulation of algorithmic management meets all three conditions. It is therefore possible to regard the GDPR as forming the fundamental layer, one that applies to any processing of workers' personal data and to any automated individual decisions. The AI Act was then introduced alongside it, expressly without prejudice to data-protection law, and includes employment uses by means of its high-risk category. The Platform Work Directive was also introduced for a particular group of workers, relying on Article 22 of the GDPR and going further by granting them the right to receive information, the right to human oversight and the right to review. None of these measures replaced their predecessors, and each one expanded the scope of the others: for instance, the directive's section on algorithmic management provides platform workers with rights which Article 22 alone does not, while the AI Act's requirements towards deployers assume and supplement rather than override the data-protection obligations.

Figure 1. The three binding layers of the EU architecture for algorithmic management

Whom it covers	What it adds	Whom it binds
Platform Work Directive, 2024: sectoral layer		
platform work only, with or without employment	worker rights: explanation, review, human decision	the digital labour platform and the Member States
added alongside, not in place of, the layer below		
AI Act, 2024: horizontal layer		
any work-related contractual relationship	obligations on named functions; almost no new rights	the system provider and the deploying employer
added alongside, not in place of, the layer below		
GDPR, 2016: base layer		
any data subject, regardless of status	right not to be subject to solely automated decisions	the data controller: employer, platform, intermediary

Note. Each layer is read by personal scope, added content, obligation, holder. Outline weight and pattern distinguish the layers: solid for the base layer, dotted for the horizontal layer whose high-risk core is deferred, hatched for the sectoral layer. Source: author's reading of the instruments in Table 1.

The observation point shows how layering takes place over time. The regulation 2026/1744, which came about after the Commission's proposal COM(2025) 836 (European Commission, 2025d), postponed the AI Act's employment-related high-risk regime until December 2027, representing a readjustment within the existing layer. At that same time, the Platform Work Directive stayed to be transposed, while the Parliament's 2025 resolution and the July 2026 consultation concerning a Quality Jobs Act indicated the need for an extra layer in the area of employment. Under these circumstances, on 2 August 2026 the architecture was both readjusted, put into effect and extended at the same time. Bulmer (2009) associates this kind of sequence with the EU timescape. The prospective Quality Jobs track is recorded in the Commission's first- and second-stage consultations (European Commission, 2025e, 2026b).

2.3 Political time, sequencing and the EU timescape

Studies of political time regard the institutionalisation of time as a variable rather than as a background factor. Goetz and Meyer-Sahling (2009) claim that terms, time budgets and time horizons, the rights concerning timing, sequencing and the speed of decision-making, and the temporal characteristics of policy influence the distribution of power, the effectiveness of policy-making and democratic legitimacy. Goetz (2009) sets out these ideas in a series of propositions concerning how the EU 'ticks', and this same set of propositions links the agenda to enlargement, differentiated integration and democratisation (Meyer-Sahling & Goetz, 2009). Thus, timing and sequencing are political outcomes with distributive effects and not merely technical remnants of the legislative process.

The literature also provides a theory of asynchrony concerning other types of unit. Thus, Willumsen and Goetz (2015) speak of staggered concerns regarding non-coinciding institutional mandates. Differentiated integration identifies temporal and territorial variations in the participation of the Member States, ranging from Stubb's (1996) multi-speed model to later systemic explanations (Leuffen et al., 2013; Schimmelfennig et al., 2015). Research into transposition explains the reasons why states and sectors implement directives at different speeds (Falkner et al., 2005; Steunenberg & Toshkov, 2009; Haverland et al., 2011).

These studies examine temporal variation at the level of institutions, states, policies and sectors; nevertheless, labour-law scholarship has for a long time regarded personal scope as a key issue. The aspect relating to the distributive effects that occur when regulatory calendars and personal scopes do not match is still less developed, and that is the gap which this paper deals with.

2.4 From institutional timing to differentiated protection

Apart from the question of institutional timing, it can be seen that the relevant point is the moment at which a category obtains an enforceable safeguard against a particular risk. Four factors are important: the scope in material terms, the scope in personal terms, the degree of legal force and the temporal applicability. A protection gap does not mean that there is no law; it may also occur when the applicable safeguards are narrower, less specific to the regulated practice or less directly accessible to one category than to another. The article thus makes a clear distinction between absences gaps and specificity gaps and regards differential protection, not the absence of law, as the thing to be compared.

It is necessary to point out that this kind of framing is different from regulatory fragmentation. Fragmentation refers to a feature of the regulatory system, namely the fact that there are partially differentiated rules and authorities present. Since there is no single established theory, the term is applied in more than one way. For example, Finck (2017) demonstrates that fragmentation of authority in EU law does not have to be interpreted as disintegration; it is still possible for a coherent regulatory system to result in uneven protection even if its rules have different personal scopes and calendars. The distributive issue therefore does not hinge on an assessment of fragmentation but rather on whether different categories of persons rely unequally on various layers whose applicability follows different trajectories. Timing becomes distributive exactly in that situation.

Existing scholarship in the field of labour law and policy has demonstrated that the scope of protection provided by algorithmic management is not equal. The Platform Work Directive includes a specific set of safeguards for people who carry out platform work, whereas parliamentary and policy analyses point out that protection is weaker in the case of those outside the platform sector (European Parliament, 2025; European Parliamentary Research Service, 2025; Wright, 2025). The current article is not asserting anything new regarding the categories of protected persons. Rather, it is asking how these pre-existing differences in the scope of protection interact with the various regulatory timelines.

2.5 Asynchronous regulatory protection

Asynchronous regulatory protection refers to a situation where various regulatory layers, each dealing with related risks, follow different paths in terms of their applicability and enforcement, resulting in systematically unequal protection gaps among the different groups of people who are protected within the same legal system. In order for this definition to be valid, there must be more than one regulatory layer, a shared area of protected interests, differences in scope or trajectory, clearly defined groups of protected persons, and a systematic, not random, distribution of the gaps. A gap is regarded as systematic if it arises from an instrument's personal-scope rule or from the regulatory trajectory on which a particular category depends, rather than because of a delay in implementation in a specific Member State; it only becomes a distributive factor when the various layers differ both in the areas they cover and in the groups of people they cover; mere temporal differentiation is not enough.

This concept must be distinguished from five neighbouring ones. Thus, layering explains how new rules are added; fragmentation relates to a differentiated regulatory setup; staggering deals with institutional cycles that do not coincide; multi-speed integration refers to the fact that states take part at different times; and transposition delay refers to the variation in the speed of implementation between states or sectors. In contrast, asynchronous regulatory protection is the question of which categories of persons have enforceable safeguards at a given time.

So far, the existing literature has looked at temporal differentiation in EU governance and the personal scope of labour protection, but it has not used their interaction as the basis for evaluating regulatory sequencing. This article presents the concept of asynchronous regulatory protection as a framework for understanding how differences in regulatory timing and personal scope lead to unequally enforceable safeguards within the same legal order.

The framework is based upon three questions (what is protected, who is protected and when protection applies), but these questions do not have the same epistemic status. The aspect of material differentiation is a descriptive feature of the coding grid, while the two propositions refer to coverage asymmetry and temporal asymmetry and could in principle be contradicted by the way the instruments are distributed and move. The framework thus designates the material dimension D1 (a descriptive dimension of the coding grid) and the two testable claims P1 and P2 (propositions regarding coverage and timing).

For D1, regarding material differentiation (what), the grid sets down, for each management function—namely recruitment, evaluation, task allocation, monitoring, scheduling, promotion and termination—the fact that binding obligations at the EU level exist, the type of those obligations and their specific character. No prior directional claim is made; rather, the pattern is simply described on the basis of the corpus.

P1, coverage asymmetry (who). At EU level, the specificity and intensity of the safeguards against algorithmic management vary depending on the categories of protected persons. Workers who carry out platform work are expected to benefit from the most targeted regime, one that is specific to their role; conventional employees are expected to depend on horizontal safeguards as well as on those which are specific to employment; and independent self-employed persons who are not involved in platform work are expected to have the least developed dedicated arrangement. The objective is to create a gradient rather than a strict hierarchy. The indicators employed are the personal scope, the number and type of dedicated benefits, and the management functions covered per instrument and category.

P2, temporal asymmetry (with reference to time). Differences in the applicable rules, the way they are transferred, and their development lead to situations in which the protections which have been adopted or agreed upon politically are not equally enforceable across different instruments and categories of protected persons. The indicator consists of the trajectory and position of each instrument for each category at the time of observation, making a distinction between the adopted entitlement and the pathway which ensures implementation and enforceable protection.

The two propositions interact. At 2 August 2026 persons performing platform work have a dedicated pathway which is to be transposed by December 2026; conventional employees enjoy horizontal safeguards, have their employment-specific high-risk layer postponed to December 2027 and also have a prospective layer; sole self-employed people who are not involved in platform work have horizontal protection where this applies but do not have a corresponding dedicated labour-law pathway. The comparison thus involves not only the regulatory trajectories but also the level of protection.

3. CORPUS AND METHOD

The study employs structured document analysis based on a predetermined grid and with a clearly defined observation point. It has a longitudinal element when it comes to reconstructing the chronologies and a cross-sectional one when it comes to the comparisons: the chronologies for each instrument are reconstructed and their protective status is compared as of 2 August 2026. In terms of methodology the requirement is for consistency not quantitative analysis: the same seven questions, the same categories of protected person and the same date are applied throughout.

3.1 The observation point

The date of 2 August 2026 was selected for three reasons. First, it is the day on which the general provisions of the AI Act, such as those relating to transparency and the provision of remedies, came into effect. Second, it is six days after Regulation (EU) 2026/1744 entered into force, which postponed the application of the Act's high-risk regime to employment uses, and four months before the deadline for transposing the Platform Work Directive. Third, it falls within the second phase of the consultation process on a Quality Jobs Act, which began on 20 July 2026. At no other point during the period in question are all the different layers of the architectural framework at the same time in distinct states: applicable, deferred, in the process of transposition and still under legislative development. It is therefore not merely a convenient point in time but the one at which the subject of the article, the coexistence of these states, is most clearly and fully evident.

3.2 Core corpus and contextual corpus

The corpus is divided on the basis of its analytical function; the core corpus consists of five regulatory tracks, as shown by the six entries in Table 1 because Regulation (EU) 2026/1744 is treated separately as the recalibration event for the AI Act. This core corpus is used in relation to the material dimension and with regard to the two propositions. The contextual corpus includes the instruments and procedures used to reconstruct the wider EU timescape and to interpret certain cells without referring to the comparative matrix. Both corpora are listed in Table 1.

Table 1. Corpus by analytical function

Instrument / process	Relevant content	Status at 2 Aug 2026	Analytical function
CORE CORPUS			
Reg. (EU) 2016/679 (GDPR)	Arts 13-15, 22, 35, 88	Applicable; Art. 22 under pending amending proposal COM(2025) 837	Base layer; D1, P1-P2
Reg. (EU) 2024/1689 (AI Act), consolidated after Reg. 2026/1744	Art. 4, Art. 5(1)(f), Art. 26, Art. 50, Arts 85-86, Annex III point 4	Art. 5(1)(f), Art. 50, Arts 85-86 applicable; Ch. III Sections 1-3 for Annex III deferred to 2 Dec 2027	Horizontal layer; D1, P1-P2
Reg. (EU) 2026/1744 (Digital Omnibus on AI) and COM(2025) 836 (European Commission, 2025d)	Deferral of high-risk regime; Art. 4 and bias-detection amendments	In force 27 Jul 2026	Recalibration event; P2
Dir. (EU) 2024/2831 (Platform Work Directive)	Ch. III, Arts 7-15; Art. 1(2); recitals 17, 54, 64	Transposition due 2 Dec 2026	Sectoral layer; D1, P1-P2
EP resolution 2025/2080(INL), report A10-0244/2025	Recommended directive on algorithmic management in the workplace	Adopted 17 Dec 2025; Commission proposal pending	Layer under legislative development; P2 (null obligations)
Quality Jobs Act, second-phase consultation, priority area 1	Algorithmic management and AI at work	Opened 20 Jul 2026; responses due 28 Sep 2026	Prospective layer; P2 (null obligations)
CONTEXTUAL CORPUS			
Draft Commission guidelines on the classification of high-risk AI systems	Interpretation of Art. 6 and Annex III, incl. work-related contractual relationships and access to self-employment	Published 19 May 2026; consultation closed 23 Jul 2026; draft, non-binding	Interpretive context for dimension 4, incl. category 5
Commission guidelines on prohibited AI practices (2025)	Reading of Art. 5(1)(f) in the workplace	Non-binding	Interpretive context
European social partners framework agreement on digitalisation (2020)	Human-in-control principle; modalities of disconnection	Autonomous implementation	Parallel soft-law trajectory
EP resolution 2019/2181(INL) (21 Jan 2021)	Request for a directive on the right to disconnect (European Parliament, 2021)	No Commission proposal	Open trajectory since 2021

Commission consultations on telework and the right to disconnect (30 Apr 2024; 25 Jul 2025)	Art. 154 TFEU, stages I and II	Stage II closed 6 Oct 2025	Procedural trajectory, no hard law
Quality Jobs Act consultation, areas on telework, psychosocial risks, disconnection	Options on OSH for off-premises work	Open until 28 Sep 2026	Parallel trajectory; timeline only
Digital Omnibus (data) proposal COM(2025) 837	Proposed replacement of Art. 22(1)-(2) GDPR	Pending	Prospective recalibration of the base layer; timeline only

Membership is decided on the basis of the content rather than on the basis of documents. An act or a process may appear in both corpora, albeit in different parts. The clearest example is the consultation on the Quality Jobs Act: the first priority area, namely algorithmic management and artificial intelligence at work, is included in the core corpus as a procedural layer with no obligations, since it is directly connected to the extension of protection against algorithmic management to conventional employment; the areas relating to telework, psychosocial risks and disconnection are included in the contextual corpus. The same rule applies to the Commission's draft guidelines on the classification of high-risk AI systems, placing them in the contextual corpus as well: these guidelines impose no obligation and do not examine any proposal, but they do help in interpreting one cell of the matrix. They are cited there as such, with their non-binding status referred to.

With regard to inclusion, the first rule is that only documents which have legal or procedural effect at the observation point are included in the grid; preparatory documents, guidelines and studies are included for the purpose of providing context or interpretation. The second rule is that the AI Act is to be considered in the version consolidated according to Regulation (EU) 2026/1744. On the other hand, Table 3 gives the amendment a separate entry so that the need for recalibration can remain visible and not be incorporated into the consolidated text

3.3 The analytical grid

The seven dimensions used to code each core instrument are: (1) the management function, (2) the type of obligation, (3) the obligation holder, (4) the personal scope, (5) the individual entitlement, (6) the enforcement mechanism and (7) the temporal trajectory. The first two of these dimensions show material differences, while dimensions three through five assess P1 with regard to coverage. P2, as regards temporal asymmetry, is examined by looking at dimension seven in conjunction with the enforcement mechanism in dimension six.

The argument has two parts. First, it must be pointed out that the person who has the obligation and the person who is protected are different, since it is the providers, deployers or platforms who have the duties, whereas the workers and applicants are the ones who receive the protection. On the other hand, in a similar way, temporal status is not a single date but a series of stages: the adoption of the entitlement, the securing of the implementation route and the establishment of enforceable protection are each recorded separately, so that a directive in transposition and a deferred regulation can be compared without both being reduced to the expression 'not yet applicable'.

3.4 Categories of protected persons and coding conventions

Dimension 4 (personal scope) is based on six standard categories: (1) the job applicant; (2) the conventional employee; (3) the platform worker who has an employment relationship; (4) the person who carries out platform work without having an employment relationship; (5) the sole self-employed person who is not engaged in platform work; and (6) other data subjects who are only covered by horizontal data-protection rules. In this instance, three conventions hold: a category indicates the basis of protection and does not define the person's exclusive identity. It is therefore possible for the same individual to be both an employee and a data subject at the same time, and a particular instrument can be allocated to that individual under more than one category. Category 6 is a legal-status umbrella and not an occupational category and is used only in those cases where none of the other categories applies. Categories 4 and 5 are not the same: the directive confers the specified rights on persons who carry out platform work without having an employment relationship but does not extend these rights to self-employed persons outside platform work, which is the reason why the two are considered separately.

With regard to blank cells, if an instrument gives rise to no obligation, no right, or no enforcement mechanism for a particular category, the relevant cell stays blank rather than being shown as missing. The absence of a specific regulatory pathway for a given category is in itself a noticeable feature in the way the

personal scope varies, and the pattern of the blank cells in the matrix counts as part of the outcome, not as an indication of a limitation in the data.

3.5 Reporting the analysis

The analysis is presented in three tables, each serving a different purpose. Table 1 describes the corpus and indicates the analytical function of each legal or procedural instrument. Tables 2a and 2b set out the comparative regulatory matrix: Table 2a lists the management functions involved, the kinds of obligations established, and the parties responsible for those obligations, whereas Table 2b compares the personal scope, the individual entitlements, the enforcement mechanisms, and the temporal status. The matrix therefore shows what is protected, who the various levels of protection cover and by what means. Table 3 includes the temporal dimension by reconstructing the regulatory timeline of the instruments from proposal and adoption to applicability, transposition or later amendment. When the matrix and the timeline are considered together, they reveal how protection is distributed among different categories of persons and how Regulation (EU) 2026/1744 changed the nominal order of those protections at EU level.

3.6 Limits

It is worth noting here that this design includes several limits: a single observation point, application of the rules at Union level only, the absence of case law and coding carried out by a single author. National transposition, more favourable national rules and national labour law are not included in the comparison. The two patterns discussed in Sections 5.5 and 5.6 were discovered in the course of the coding process, not specified in the framework before the study began. They should therefore be treated as exploratory results.

4. THE LAYERED ARCHITECTURE AT 2 AUGUST 2026

4.1 The base layer: the General Data Protection Regulation

The GDPR covers all management functions that involve personal data, even if it does not name those functions expressly. On automated decisions, Article 22 provides protection against decisions based solely on automated processing which could have legal or significant effects, including some exceptions and safeguards such as the possibility of human intervention, the right of the individual to state their point of view and the right to challenge the decision. Articles 13 to 15 set out the obligation to provide information in the case of automated decisions, Article 35 mandates an impact assessment for high-risk processing, and Article 88 permits more specific rules in the context of employment.

The regulation makes it clear that the employer, the platform or the intermediary functions as the controller and is therefore responsible, while any data subject is entitled to protection. However, this protection, although wide in relation to personal data, is structurally weak since Article 22 only comes into play in the case of significant decisions made entirely by automation and relates to processing, not to management functions. Enforcement is carried out by the data-protection authorities via fines and through judicial measures. The provision has been in effect since 2018 and was still unchanged at the time of the observation, even though Article 22 is now the subject of a proposed amendment contained in COM(2025) 837 (European Commission, 2025c).

4.2 The horizontal layer: the AI Act, as amended in 2026

The AI Act lists the management functions which it applies. According to point 4 of Annex III, high-risk AI systems are those which are intended to be used for the recruitment or selection of natural persons, specifically for placing targeted job advertisements, for analysing and filtering applications and for assessing candidates, as well as systems that are meant to make decisions concerning the terms of work-related relationships, promotions and dismissals, for allocating tasks on the basis of an individual's behaviour or personal traits and characteristics, and for monitoring and evaluating the performance and behaviour of persons within such relationships. The heading of point 4 also includes access to self-employment. Moreover, Article 5(1)(f) bans the use of AI systems that infer the emotions of natural persons in the workplace, with the exception of cases where this is for medical or safety purposes. Also, Article 50 sets out transparency requirements for systems that interact with humans and for generated content. These requirements are not limited to the employment context. Interpretive guidance on the prohibition in the workplace is given by the Commission's non-binding guidelines on prohibited practices (European Commission, 2025a).

The obligations attached to the high-risk category fall primarily on the provider. At the same time, the deployer, who is generally the employer in the case of employment situations, has to ensure the system's use, provide oversight and monitoring and make the information available as required by Article 26. Although the Regulation gives workers only very limited rights, it does include some binding safeguards which are specific to employment. For instance, Article 26(7) lays down the obligation to inform workers at the workplace before high-risk systems are put into service, and Article 26(11) relates to people who are affected by decisions made or supported by a system listed in Annex III. Chapter IX offers, in Article 85, a means by which complaints can be filed and, in Article 86, a right to have certain individual decisions explained. Yet these provisions are still considerably less thorough than the dedicated framework for labour law set up by the Platform Work Directive. It therefore follows that the AI Act contains no equivalent general right to human review and imposes, at the EU level, no additional obligation to consult workers' representatives beyond that which is provided by applicable labour law.

The extent of personal scope is mainly determined by the regulated use rather than by the person's occupational status. As shown in point 4 of Annex III, employment, the way workers are managed and access to self-employment all fall within the scope, and recital 57 mentions work-related contractual relationships, such as those between employees and individuals who provide services via platforms. It is therefore on this basis that uses relating to self-employment are included. While the Commission's 2026 draft classification guidelines, although not binding at the time in question, support a wider interpretation which goes beyond platform work to cover independent contractors and service providers, these guidelines are here referred to only as an element for interpretation and not as the legal basis for coverage. Eligibility is still determined on a case-by-case basis and does not depend on status (European Commission, 2026a).

The most broken timeline is to be found in the instrument itself. Article 113 retains 2 August 2026 as the general date of application. Regulation (EU) 2026/1744, which came into force on 27 July 2026, includes one exception: for systems listed in Annex III, the provisions of Chapter III, Sections 1 to 3 (that is, the classification rules, the requirements for high-risk systems and the obligations of providers and deployers, including Article 26) come into force only from 2 December 2027. All other provisions follow the general schedule. At the observation point, the ban stated in Article 5(1)(f) has been in force since 2 February 2025; the transparency requirements in Article 50 come into effect on 2 August 2026; the right to file a complaint under Article 85 also comes into effect on that date, but only with regard to the provisions applicable at that time; and Article 86 applies formally from 2 August 2026, since Chapter IX, Section 4, was not one of the provisions deferred. In practice, however, the operation of Article 86 is separated from the regime which triggers it: the classification of a system as a high-risk system in Annex III and the substantive obligations which give effect to that classification apply only from 2 December 2027. The same amending regulation altered the AI-literacy obligation in Article 4, changing it from a requirement to ensure literacy to a requirement to take measures to support it, and introduced a legal basis for processing special categories of data in order to detect and correct bias. Thus, on 2 August 2026 the employment-related architecture of the AI Act includes an applicable prohibition, generally applicable transparency and remedy provisions and a deferred substantive high-risk core.

4.3 The layer by sector: the Platform Work Directive

The directive is the only part of the entire regulatory framework which includes a rule specifically concerned with algorithmic management. When outlining automated decision-making systems, it lists the areas to which it applies: (a) decisions regarding recruitment, (b) access to and the organisation of work assignments, (c) earnings, including the setting of individual assignment prices, (d) safety and health, (e) working time, (f) access to training, (g) promotion or something equivalent to it, and (h) contractual status, such as the restriction, suspension or termination of an account. Automated monitoring systems are also covered, being described as systems that monitor, supervise or assess work performance or the activities carried out in the work environment. It is thus the most complete list of management functions in the corpus and the only one that includes scheduling and pay.

The obligations involved are extensive. Articles 7 to 9 limit data processing, require impact assessment and consultation, and include detailed requirements relating to transparency. Article 10 mandates that human oversight and human decisions should be made when a restriction, suspension or termination is in question; Article 11 offers an explanation, specifies the reasons, allows for a review and provides for rectification or compensation. Articles 12 to 14 contain duties relating to occupational safety and to information and consultation. As a whole, these provisions form the most narrowly focused group of rules in the corpus.

The digital labour platform is the party that has the obligation, together with the Member States, who are in charge of implementing the rules and of ensuring equal protection through intermediaries. The personal scope is built into the instrument itself. Platform workers have all the rights listed. Those who perform platform work without being in an employment relationship have, as stated in Article 1(2) and in recital 54, the rights concerning the protection of personal data, that is to say the limitations referred to in Article 7, transparency, human oversight and the right to review, but not the safety-and-health and information-and-consultation rights provided for in Articles 12 and 13, since these are reserved for workers. Moreover, Article 11 excludes from the scope persons who are regarded as business users in the sense of Regulation (EU) 2019/1150. Recruitment candidates are covered by the scope of Articles 7 and 9. Conventional employees and independent self-employed persons who are not involved in platform work are entirely outside the scope of the instrument. Enforcement is the responsibility of the data-protection supervisory authorities in charge of the provisions relating to data, who may impose fines amounting to the amounts specified in Article 83(5) of the GDPR, and of the national competent authorities, who offer remedies, protection against adverse treatment and, in particular, the labour-law mechanisms of presumption and inspection.

The trajectory has been adopted but not yet completed. The directive came into effect on 1 December 2024; the Member States have to put it into effect by 2 December 2026, and the legal presumption of employment only applies from that date. Consequently, at the point under observation, the special regime is regarded as a right which has been adopted and which has a guaranteed route and the same deadline, but it is not yet enforceable under national law in those Member States that have not implemented the directive early. This is precisely the way in which the directive and the AI Act differ as of 2 August 2026: both have been adopted, neither is enforceable with regard to their main provisions, but in one case the deadline has been kept while in the other it has been lost.

4.4 The layer under legislative development

The two documents outline the organisations' response to the gap left by the three binding layers. In December 2025, the European Parliament, under Article 225 TFEU, adopted a resolution in which it made recommendations to the Commission on matters relating to digitalisation, artificial intelligence and algorithmic management in the workplace. The directive which is recommended would introduce into all workplaces the essential features of the platform work system, namely information on the use of algorithmic systems, consultation with workers' representatives, a prohibition of certain intrusive practices and human oversight of significant decisions. However, the scope of the recommendations with regard to individuals is restricted to workers and employers within the Union; the self-employed acting alone, who had been considered during the preparatory work, are not covered by the recommended text, primarily due to the limitations of the legal basis of social policy. The Commission has not yet tabled a proposal at that stage.

On 20 July 2026 the Commission launched the second-phase consultation with the social partners regarding the Quality Jobs Act under Article 154 TFEU, with algorithmic management and artificial intelligence being identified as the main areas of focus. Neither the Parliament's recommendation nor the consultation itself gives rise to any obligation, right or enforcement mechanism; this is shown in Tables 2a and 2b by the presence of cells indicating no obligation or no protection and is reflected in Table 3 by the procedural route followed. The significance of these tables is that they record a possible layer of conventional employment while the existing layer relating to AI was being delayed.

4.5 The comparative matrix

Tables 2a and 2b provide three interpretations. With regard to material specificity, it is greatest in the case of consequential decisions, while scheduling and pay are referred to only in the sectoral directive. Regarding the personal aspect, the binding provisions show a gradation: the GDPR is broad but superficial; the AI Act is broad but has relatively few provisions concerning workers' rights; the directive is narrow but detailed. As far as the temporal aspect is concerned, the various pathways are as described. Two exploratory patterns identified during the coding process are further explored in Section 5: the material and personal scopes are partly nested, and the AI Act contains an internal inconsistency between the formal applicability of remedial measures and the deferred high-risk core.

The fact that there are no entries in the prospective rows or in the categories outside a layer's personal scope does not mean that the data is missing; instead, these cells show that there is no applicable obligation or no specific pathway and so they are included in the personal-scope result.

Table 2a. Comparative regulatory matrix: management functions, obligations and obligation holders

Instrument	1. Management functions reached	2. Type of obligation	3. Obligation holder
GDPR (Reg. 2016/679), Arts 13-15, 22, 35, 88	Any function involving personal data; specifically solely automated decisions with legal or similarly significant effects (no function named)	Right against solely automated decisions with exceptions; safeguards; information on logic; DPIA; opening for national employment rules (Art. 88)	Controller (employer, platform, intermediary)
AI Act (Reg. 2024/1689) as amended by Reg. 2026/1744	Named: recruitment/selection (targeted ads, filtering, evaluation); terms of work relationship, promotion, termination; task allocation on behaviour/traits; monitoring and evaluation of performance and behaviour; access to self-employment. Prohibition: emotion inference at the workplace (Art. 5(1)(f))	Provider conformity requirements (risk management, data governance, documentation, human-oversight design, accuracy); deployer duties Art. 26 (use per instructions, oversight, monitoring, logs, information of workers and of persons subject to decisions); AI literacy (softened 2026)	Provider primarily; deployer/employer for Art. 26
Platform Work Directive (Dir. 2024/2831), Ch. III, Arts 7-15	Named: recruitment; access to and organisation of assignments; earnings and pricing; safety and health; working time; training; promotion; contractual status incl. account restriction/suspension/termination; automated monitoring of performance and work environment	Processing prohibitions (Art. 7); mandatory DPIA with consultation (Art. 8); detailed transparency (Art. 9); human oversight, biennial evaluation, human decision for account/status decisions (Art. 10); explanation, written reasons, review in two weeks, rectification/compensation (Art. 11); OSH incl. psychosocial risks (Art. 12); information and consultation (Arts 13-14)	Digital labour platform; Member States (transposition, intermediaries Art. 3)
EP resolution 2025/2080(INL) (Dec. 2025)	Recommended: information, consultation, prohibited invasive practices, human oversight of significant decisions, all workplaces	None (recommendation to the Commission under Art. 225 TFEU)	None
Quality Jobs Act, second-phase consultation (20 Jul 2026), priority area 1	Consultation topics: transparency and human-centredness of automated management decisions; protection from excessive monitoring	None (Art. 154 TFEU consultation)	None

Table 2b. Comparative regulatory matrix: personal scope, entitlements, enforcement and temporal trajectory

Instrument	4. Personal scope (categories 1-6)	5. Worker entitlement	6. Enforcement mechanism	7. Trajectory and status at 2 Aug 2026
GDPR (Reg. 2016/679), Arts 13-15, 22, 35, 88	All six categories, undifferentiated (any data subject)	Not to be subject to solely automated decision; human intervention, express view, contest; information about logic	Data-protection supervisory authorities; fines Art. 83; judicial remedies Arts 79, 82	Applicable since 25 May 2018; enforceable for all categories; unchanged by later layers
AI Act (Reg. 2024/1689) as amended by Reg. 2026/1744	Persons in work-related contractual relationships and access to self-employment: categories 1-4; category 5 where the use concerns access to self-employment or a qualifying work-related contractual relationship. Annex III point 4 supplies the textual basis; the Commission's May/July 2026 draft guidelines support the broader reading but are non-binding. Category 6 via natural-person provisions.	Information that one is subject to the system (Art. 26(7), (11)); complaint to market surveillance authority (Art. 85); explanation of individual decision based on Annex III system output (Art. 86). No human-review right	National market surveillance authorities; penalties Art. 99; AI Office for GPAI; no labour-authority role	Art. 5(1)(f) enforceable since 2 Feb 2025; Arts 50, 85-86 formally applicable from 2 Aug 2026; Ch. III Sections 1-3 for Annex III systems incl. Art. 26 deferred to 2 Dec 2027. Art. 86 is formally applicable but its substantive trigger is temporally decoupled from the deferred classification/high-risk regime.
Platform Work Directive (Dir. 2024/2831), Ch. III, Arts 7-15	Category 3: full set. Category 4: Arts 7-11 (data-protection-related rights) but not Arts 12-13; Art. 11 excluded for business users (Reg. 2019/1150). Category 1: Arts 7(2), 9(5) in platform recruitment. Categories 2 and 5: not covered	Information and portability; explanation; written reasons; review; rectification or compensation; human decision on account restriction; expert assistance for representatives	DPAs for data-related provisions (fines up to Art. 83(5) GDPR ceilings); national competent authorities; remedies; protection from adverse treatment; inspections	In force 1 Dec 2024; transposition due 2 Dec 2026 (date unchanged); presumption from 2 Dec 2026; adopted entitlement with secured pathway, not yet enforceable via national law at observation point
EP resolution 2025/2080(INL) (Dec. 2025)	Recommended scope: workers and employers in the Union (category 2, and 3 where applicable); solo self-employed (category 5) outside recommended scope	None	None	Adopted Dec. 2025; Commission response pending; no proposal at observation point
Quality Jobs Act, second-phase consultation (20 Jul 2026), priority area 1	Prospective; workers (category 2 primarily)	None	None	Opened 20 Jul 2026; responses due 28 Sep 2026; prospective layer

The categories in dimension 4 are as follows: (1) the job applicant; (2) the conventional employee; (3) the platform worker who has an employment relationship; (4) the person who carries out platform work without having an employment relationship; (5) the sole self-employed person who is not engaged in platform work; and (6) other data subjects who are only covered by the horizontal data-protection rules.

Source: compiled by the author from the Official Journal texts and the institutional documents mentioned in Section 3.

5. ASYNCHRONOUS PROTECTION: READING THE TIMELINE

The architecture was defined in Section 4 at the point of observation; in this section, however, consideration is given to time. Table 3 reconstructs the trajectories of both the core and the contextual corpora and then examines the descriptive material patterns, P1 and P2, together with two exploratory findings that were obtained during the coding process and which were not expected within the framework.

5.1 The regulatory timeline

Table 3 includes three temporal features. The GDPR is the earliest of the completed layers, even though Article 22 is currently the subject of a prospective amendment. Although the AI Act and the Platform Work Directive were both introduced and adopted on similar political timelines, they were given different implementation schedules. The one thing that has changed an originally set date is the 2026 amending regulation: the chapters in Chapter III, Sections 1 to 3 relating to Annex III systems, are being transferred from 2 August 2026 to 2 December 2027.

5.2 Material differentiation

The material aspect shows a clear pattern and does not lend support to the idea of a directional trend. The binding safeguards vary systematically according to the management function. All three binding layers handle automated decisions that have legal or equivalent importance in different ways. At the same time, only the Platform Work Directive refers to working-time organisation and earnings. For conventional employees therefore the degree of specificity drops as the analysis moves from important decisions to the continuous coordination of work. This descriptive finding has theoretical significance since, as Section 5.5 demonstrates, the material pattern is not independent of the personal scope.

5.3 Coverage asymmetry

P1 is supported as a gradient of dedicated protection, with one correction to the normal expectation. Those who carry out platform work enjoy the highest degree of dedicated and function-specific protection, and the directive draws a distinction between workers and individuals who are carrying out platform work without being employed. Traditional employees benefit from horizontal safeguards as well as the delayed AI employment layer and a future legislative track. Solo self-employed persons outside platform work have only a textually based but relatively weak position under the AI Act because Annex III, point 4, specifically refers to access to self-employment. The Commission's draft guidelines support but do not legally confirm the broader interpretation of that point outside the context of platform work. The problem is that this category does not have a dedicated route within labour law. The gradient is therefore not a simple hierarchy since horizontal protection can still be shared even though the level of dedicated protection differs greatly.

5.4 Temporal asymmetry and its interaction with coverage

Support for P2 is already in place, and its interaction with P1 is at the level of the nominal Union regulatory trajectories. From 2 August 2026, platform workers are subject to a special regime, the transposition deadline for which is 2 December 2026. Conventional employees have horizontal safeguards, the employment-specific high-risk layer (this has been moved from 2 August 2026 to 2 December 2027), and also a prospective layer. Solo self-employed individuals who are not engaged in platform work have horizontal protection where it applies, the same postponed AI foothold and no specific labour-law pathway.

Figure 2 shows the two nominal pathways both before and after the amendment, together with the intra-layer decoupling mentioned in Section 5.6.

Figure 2. Reversal of the nominal Union-level sequencing after Regulation (EU) 2026/1744

	2026					2027											
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Before Reg. 2026/1744	AI Act Art. 26(7)		4 months		PWD deadline												
After Reg. 2026/1744					PWD deadline		12 months									AI Act Art. 26(7)	
Inside the AI Act	Art. 86 applicable		16 months												Annex III core		

Note that the cells enclosed in a box indicate the nominal dates established by Union law: the employment-specific information duty under Article 26(7) of the AI Act, which was originally scheduled to apply from 2 August 2026 but has been postponed to 2 December 2027, and the transposition deadline for the Platform Work Directive (PWD), which remains at 2 December 2026. The hatched cells display the time interval between the two routes: four months in one case before the amendment and twelve months in the other after it. The dotted row illustrates the intra-layer decoupling, since Article 86 comes into force on 2 August 2026, sixteen months prior to the Annex III high-risk core to which its triggering condition refers. The cells give an approximation of calendar months and the dates refer to the applicability at Union level, not to enforcement in each Member State. Source: compiled by the author from Table 3.

The fact that the postponement has a distributive character can be made clearer by comparing the relevant dates in the nominal Union calendars. Before Regulation (EU) 2026/1744, the obligation under Article 26(7) to give employment-specific information was due on 2 August 2026, four months before the deadline for transposing the Platform Work Directive; after the amendment, that safeguard is set for 2 December 2027, which is twelve months after the deadline for the Directive. Regulation 2026/1744 has therefore reversed the order of the two regulatory routes at the nominal EU level and has changed the interval from four months in one direction to twelve months in the other. However, it does not determine the date by which the protection becomes effectively enforceable in each Member State since transposition could occur either early or late and national differences are not taken into account. The issue in question is the order established by Union law, and it is precisely at this level that the amendment applies.

5.5 First unanticipated result: what is protected depends on who is protected

The initial exploratory pattern was found during the coding process and not previously planned. To some degree material and personal differentiation are nested because working time and earnings are referred to only in the instrument that has the smallest personal scope. The structure therefore includes various substantive menus as well as different levels of protection. The aspect of EU law which is protected depends in part on who is covered by the relevant layer and thus the mechanism is strengthened without changing the definition of asynchronous regulatory protection.

5.6 Second unanticipated result: asynchrony within a layer

The second exploratory pattern is that of temporal decoupling within layers. Regulation (EU) 2026/1744 has delayed the application of Chapter III, Sections 1 to 3 for Annex III systems until 2 December 2027, whereas Article 113 has left Chapter IX, Section 4 unchanged with regard to the general calendar. It follows that Article 86 is formally in force from 2 August 2026, even though the classification rules and the substantive obligations of the provider or deployer linked to the triggering conditions in its Annex III have been postponed. A more rigorous legal interpretation is possible. If the postponed classification rules leave the expression 'a high-risk AI system listed in Annex III' without a fully effective trigger, then Article 86 may be formally applicable but will in fact have no effect. On that interpretation, the conclusion reached is not an immediate asynchronous solution but rather a discrepancy between formal applicability and substantive operability. In both cases, the text demonstrates that there is temporal decoupling within the regulation and not a single application date for the whole AI Act.

The distributive significance of that decoupling is conditional. Starting in December 2026, people who do platform work will have the right to receive information and have their cases reviewed under the Directive, regardless of whether they are classified under the AI Act, whereas conventional employees and

solo self-employed persons have no equivalent specific provision. The finding is therefore seen as preliminary evidence of intra-layer temporal decoupling and not as proof that Article 86 will be fully enforceable before December 2027.

5.7 Summary of findings

The analysis spots one pattern concerning the material aspect, backs up two propositions and also contains two exploratory refinements. The degree of protection that is specific to function is not the same across the various management functions; the dedicated safeguards vary according to personal scope; and Regulation 2026/1744 reverses the order at the EU level for both the main platform-work and conventional-employment routes. Moreover, material and personal scope are to some extent nested, and the AI Act shows a temporal decoupling within the different layers between the formal applicability of corrective measures and their actual operation.

Table 3. Regulatory timeline of the core and contextual corpus, with 2 August 2026 as observation point

Instrument / process	Proposal	Adoption	Entry into force	Applicability / transposition (original)	Amendment	Revised applicability	Status at 2 Aug 2026
GDPR (Reg. 2016/679)	25 Jan 2012 (COM(2012) 11)	27 Apr 2016	24 May 2016	Applicable 25 May 2018	Digital Omnibus (data) proposal COM(2025) 837 (European Commission, 2025c), 19 Nov 2025; proposes replacement of Art. 22(1)-(2); not in force	None in force at observation point	Applicable; enforceable for all categories
AI Act (Reg. 2024/1689)	21 Apr 2021 (COM(2021) 206)	13 Jun 2024; OJ 12 Jul 2024	1 Aug 2024	Art. 5: 2 Feb 2025; general application 2 Aug 2026; Annex III core originally 2 Aug 2026	COM(2025) 836 (European Commission, 2025d), 19 Nov 2025 → Reg. 2026/1744 of 8 Jul 2026; OJ 24 Jul 2026; in force 27 Jul 2026	Ch. III Sections 1-3 for Annex III; 2 Dec 2027; Annex I: 2 Aug 2028; remedies (Arts 85-86) and Art. 50 unchanged at 2 Aug 2026	Prohibition applicable; transparency and remedies applicable from observation point; substantive high-risk core postponed 16 months
Platform Work Directive (Dir. 2024/2831)	9 Dec 2021 (COM(2021) 762)	EP position 24 Apr 2024; Council 14 Oct 2024; signed 23 Oct 2024; OJ 11 Nov 2024	1 Dec 2024	Transposition by 2 Dec 2026; legal presumption from 2 Dec 2026	None	None	Adopted; secured pathway; deadline unchanged; not yet enforceable via national law
EP legislative-initiative resolution 2025/2080(INL)	EMPL draft report 26 Jun 2025	EMPL vote 10 Nov 2025; plenary 17 Dec 2025 (451-45-153)	n/a	n/a	n/a	n/a	Recommendation adopted; Commission proposal pending
Quality Jobs Act (Art. 154 TFEU process)	First-stage consultation Dec 2025 - Jan 2026	n/a	n/a	n/a	n/a	n/a	Second-phase consultation opened 20 Jul 2026; responses due 28 Sep 2026
Contextual: draft Commission guidelines on classification of high-risk AI systems	Published 19 May 2026	n/a	n/a	Consultation closed 23 Jul 2026	n/a	n/a	Draft; non-binding
Contextual: Commission guidelines on prohibited AI practices	n/a	Published 2025	n/a	Non-binding interpretive guidance on Art. 5(1)(f)	n/a	n/a	Interpretive context
Contextual: social partners framework agreement on digitalisation	23 Jun 2020	n/a	n/a	Autonomous implementation	n/a	n/a	Parallel soft-law trajectory
Contextual: EP right-to-disconnect resolution 2019/2181(INL)	21 Jan 2021	Adopted 21 Jan 2021	n/a	Request for directive	n/a	n/a	No Commission proposal
Contextual: Commission telework/right-to-disconnect consultations	30 Apr 2024 first stage	n/a	n/a	25 Jul 2025 second stage; closed 6 Oct 2025	n/a	n/a	No hard law; later linked to Quality Jobs process
Contextual: Quality Jobs Act - telework/OSH/disconnection areas	First-stage consultation 4 Dec 2025-29 Jan 2026	n/a	n/a	Second-stage consultation opened 20 Jul 2026	n/a	n/a	Prospective; timeline only
Contextual: Digital Omnibus (data) COM(2025) 837	19 Nov 2025	n/a	n/a	Pending legislative proposal	Proposes replacement of GDPR Art. 22(1)-(2)	No amendment in force	Prospective recalibration of GDPR base layer

Contextual rows are used for timeline reconstruction and interpretation, not for the descriptive material dimension or P1. Dates are from the Official Journal, EUR-Lex and the institutions' own announcements. Source: compiled by the author.

6. DISCUSSION

6.1 Layering observed in motion

The results indicate a process of slow institutional change. The example of the EU meets the layering conditions outlined in Section 2, since, at the point under observation, several layers are being adjusted at the same time: the AI Act has just been recalibrated, the directive is currently being transposed and Article 22 of the GDPR is undergoing a prospective amendment. Layering is therefore best understood as a situation involving overlapping adjustments rather than as a sequence of successive additions. In the same fortnight in July 2026 one layer was recalibrated while another layer was at the same time being added through the Quality Jobs Act. The link that Bulmer (2009) established between historical institutionalism and the EU timescape is clearly apparent here: it is through timing and sequencing that layering is managed.

6.2 Timing as a distributive instrument

The point about political time is that Goetz and Meyer-Sahling (2009) consider the rights involving timing, sequencing and speed to be part of power in the EU. Regulation (EU) 2026/1744 changed one of the originally fixed dates but left unchanged the timetable specified in the Platform Work Directive. Consequently, there has been a reversal in the nominal sequence at Union level since the employment-specific information safeguard provided for in Article 26(7) has shifted from four months before the deadline for transposing the Directive to twelve months after it. This pertains to the legal schedules established at Union level and not to consistent enforcement among all Member States. The distributive character of the situation comes about because the modification of the schedule in one area interacts with the unaltered scopes in the other areas.

The finding also qualifies the official account of the amendment as a deferral necessitated by the readiness for implementation. The co-legislators cited the delay of the standards, the adoption of common specifications, the issuance of guidance, and the establishment of the national competent authorities as the reasons for postponing the high-risk obligations. Although this may correctly identify the motivation behind the decision, it still remains incomplete in terms of its actual effect. A deferral which is justified on the grounds of administrative readiness still spreads out the period of waiting among the various categories of protected persons. The article does not say that this result was intended; instead, it highlights the consequence arising from the interaction of the regulatory calendars.

The delay was also the subject of political debate. When discussing the Digital Omnibus in the 2026 negotiations, the European Trade Union Confederation claimed that it could lead to a weakening of workplace protections and used the amendment as a way of reinforcing its request for specific legislation concerning AI in the workplace; following the provisional agreement it once again stated that employment continued to be a high-risk area and needed strong protection (European Trade Union Confederation [ETUC], 2026a, 2026b). While these comments presented the issue as one of diminished worker protection and regulatory uncertainty, the official reason given focused on standards and the readiness for implementation. Neither of the two sets of terms highlighted the relative sequencing effect between traditional employment and platform work, an effect which only becomes apparent when both the personal scope and the timing are considered together.

6.3 Two extensions of the framework

The two unexpected findings develop the idea in separate ways. The partial nesting of material and personal asymmetry has an effect of making the mechanism more effective. In Section 2 it was assumed that what is protected and who is protected were independent dimensions, and that their interaction with timing produced uneven gaps. However, Section 5.5 demonstrated that within each layer the two are linked: the functions which have the most direct impact on the working day—scheduling and pay—are named only in the instrument which has the most limited personal scope. The gaps which timing distributes are thus not gaps in a single, uniform range of protection but gaps in sets of protection that already vary according to category. Although the definition of asynchronous regulatory protection does not have to be altered, its mechanism should be stated more accurately than in Section 2: timing becomes distributive when the various layers differ in both what they protect and whom they protect, and the things that are protected are in part determined by who they cover.

The idea of intra-layer asynchrony broadens the scope of the concept. The framework was designed to allow comparison between layers; Section 5.6 discovered the same pattern within a single layer: the AI Act's explanation right being applicable sixteen months before the regime which provides the triggering content. Two consequences arise. Firstly, the instrument cannot be the unit of temporal analysis: a regulation is not treated as being applicable or deferred as a whole, and if Table 2 had recorded only one date per act, it would

have failed to capture the result. Secondly, intra-layer asynchrony is either absorbed or revealed depending on the other layers: platform work is covered by the directive's own explanation right from December 2026, whereas conventional employment is not. The pattern which was found throughout the architecture is also present within it and indicates the same thing.

6.4 The external extension: management at a distance

While the framework could extend to digitally mediated work, this extension is not examined in the present study. At the EU level, regulation concerning telework and disconnection is less advanced than national legislation in several Member States (Business Europe et al., 2020; European Parliament, 2021; Eurofound, 2020; European Commission, 2024, 2025b); an example of this is Romania's Law No. 81/2018 (Parlamentul României, 2018). Previous evidence relating to fully remote work shows that allocation, monitoring and evaluation can be carried out by human supervisors using digital infrastructure (Maroşan, 2021). Human and algorithmic management may therefore both exist within virtual teams, but the current article only considers this situation as a further case in which to test whether temporal and personal differentiation also apply between human and automated forms of the same managerial function.

6.5 What the observation point does not settle

Three developments following the observation point will serve to test the findings. The transposition of the directive by 2 December 2026 will change the platform-work pathway from an adopted to an enforceable one, and the variation in national transposition—which was omitted by this article—will then become the next area of asynchrony. The application of the AI Act's high-risk core on 2 December 2027 will close the intra-layer gap mentioned in Section 5.6 and will reduce, but not eliminate, the gap between platform work and conventional employment. The result of the Quality Jobs Act process, which began as a result of the Commission consultations (European Commission, 2025e, 2026b), will decide whether the layer under development extends to conventional employees and whether it reaches solo self-employed persons at all, since the social-policy legal basis already in place places limits on the Parliament's recommendation. The framework does not anticipate these outcomes. It states only that, whatever they are, their distributive effects will be observable only if the categories of protected persons, and not the instruments, are taken as the unit of observation.

7. CONCLUSION

In less than ten years, the European Union has established a multilayered system for the management of algorithms: a foundation based on data protection, a general regime concerning AI, a sector-specific directive for platform work, and an additional layer which is still being developed. As of 2 August 2026, these various elements lie at different points in time. Those who carry out platform work are covered by a specific regime which follows the same transposition route as before; conventional employees have access to the general safeguards and their employment-specific AI provisions are delayed by sixteen months; independent self-employed individuals who are not engaged in platform work have a textual basis in the delayed AI layer but no specific pathway under labour law.

Three results carry the argument beyond that description. First, Regulation (EU) 2026/1744 has reversed the original order at the Union level concerning the two regulatory routes: instead of being set four months before the deadline for transposing the Platform Work Directive, Article 26(7) is now scheduled twelve months after that deadline. Secondly, the scope of protection provided by the architecture in part depends on who is included, since rules relating to working time and earnings appear only in the sectoral regime. Thirdly, the AI Act includes intra-layer temporal decoupling in that Article 86 is formally applicable prior to the classification and the substantive high-risk rules connected with its trigger, even though its actual operability during that period is legally open to challenge. It is only when the temporal sequence and the scope of application are examined together that these conclusions become apparent.

The contribution of the concept is limited and therefore justifiable. It adopts the idea of layering from historical institutionalism and makes the observation regarding overlapping adjustments. Drawing on the assumption from the study of political time that timing and sequencing have distributive effects, it applies this to the relative positions of the protected categories. From labour-law literature, it takes the well-known issue of the scope of personal protection and the gaps associated with it, then adds the question of how regulatory calendars rearrange these gaps. Timing becomes distributive when the various layers differ in

both what they protect and whom they protect; the analysis also demonstrates that what they protect is in part determined by whom they cover.

The design includes the limitations mentioned in Section 3: only one observation point at Union level, no case law, and the single-author coding is not made reproducible through the published matrix. Each of the following will cause changes to the cells of the matrix: the transposition of the Platform Work Directive, the application of the AI Act's high-risk core, and the outcome of the Quality Jobs Act process. The framework does not predict any of these outcomes; instead, it provides a method for identifying their distributive effects by considering both the timing and the personal scope.

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Sole author - conceptualization, methodology, investigation, formal analysis, writing, review and editing.

Competing interests

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Ethical approval

Not applicable. The study analyses publicly available legal and institutional documents and involves no human participants.

Informed consent

Not applicable.

Data availability

All source documents are publicly available through EUR-Lex and the institutional sources cited in the manuscript. The complete coding matrix is reproduced in Tables 2a and 2b and the regulatory timeline in Table 3, allowing coding decisions to be traced to the cited primary sources.

Use of generative AI

Generative AI tools were used during manuscript preparation for language editing, structural revision and consistency checking. The author verified the primary sources, legal provisions, coding decisions and substantive claims and takes full responsibility for the final text.

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