

# MEĐUNARODNI PROBLEMI INTERNATIONAL PROBLEMS

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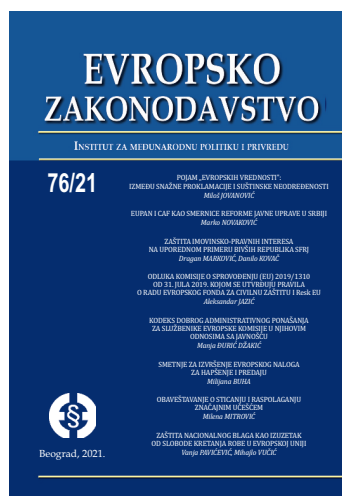
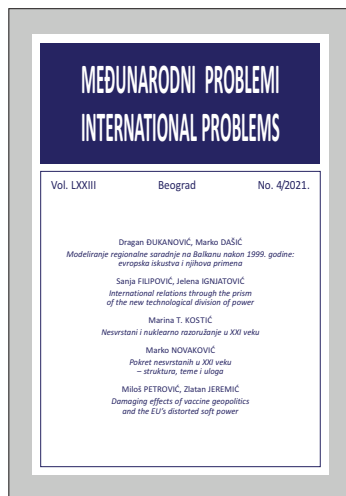
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# MEĐUNARODNI PROBLEMI

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## Security component of states' stability on a national and international level

Žarko OBRADOVIĆ<sup>1</sup>, Miroslav MLADENović<sup>2</sup>

**Abstract:** The paper analyses the issue of political stability in the context of changes in the positions of major political actors. The altered role of the nation-state in the conditions of globalisation inevitably reflects on the understanding of the security phenomenon. On the other hand, the number and characteristics of security challenges and threats have increased significantly. In addition to the previously present problems, there has been an increase in drug trafficking, illegal migration, human organ trafficking, an escalation of piracy, and the criminalisation of various spheres of life. In the last two years, the world has also faced a new global security problem, this time in the field of health — the COVID-19 pandemic. Practice has shown that (in most cases) the nation-state has become weaker and less independent, and its corresponding state-centric security system is inefficient, costly, cumbersome, and inadequate to many new threats. The strength of this conclusion stems from the analysis of the functioning of the national security system in the case of terrorist attacks, but also from the study of the mechanisms used for overthrowing sovereign states under the decisive influence of external factors.

**Keywords:** political stability, state, security, national security system, non-state security.

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## Political stability

*"Our 20th century was perhaps the most dramatic period in human history from the aspect of the destiny of people, nations, ideas, social systems, and civilizations.*

*Nonetheless, it was a century of human passion and suffering – a century of hope and despair, illusion and enlightenment, delusion and disappointment, joy and sorrow, love and hate...*

*It was, perhaps, the last human century. In order to replace it, there is a heap of centuries of superhuman or posthuman history;*

*History without hope and despair, without illusions and enlightenment, without delusion and disappointment, without joy and sorrow, without love and hatred".*

*(Zinoviev 1997).*

The word "stability" (from the Latin *stabilis*, which means constant, stable) refers to the strengthening, or bringing to a stable state, or maintaining a stable state of various phenomena and processes. In systems theory, stability refers to a system's ability to function reliably without changing its structure and to remain in balance despite various attempts to break it down.

Analogously, we can define political stability as a state of the political system in which it develops normally and functions efficiently without changing its structure, regardless of the actions of external and internal factors. An important feature of stable systems is the ability of political entities to maintain impacts and changes within acceptable limits, as well as to quickly restore any major disturbances to a state of equilibrium without changing the identity and essence of the system. According to the creator of the structural-functional approach, Talcott Parsons, "a system is stable if it is in relative equilibrium, if the relationships between its structure, internal processes, and the environment are such that the properties that make up that structure do not change" (Parsons 1993, 93). According to him, an important feature in the stability of the system is its ability to adapt to different actions by external factors (Parsons 1993). In other words, a political system that, during its functioning, violates the elements of its identity, i.e., comes into conflict with its own nature, loses the property of stability. Political stability is most strongly affected by the sudden changes, transition periods, and "shocks" in the economic, political, and social spheres of society, as well as the frequent changes of ruling elites.

System stability is a relative term best observed through comparisons with other systems. During the comparative analysis of the stability of political systems, one should consider the following: the length and permanence of certain

organisations, institutions, and procedures; their role and importance in the social consciousness; the level of external threats; the degree of harmonisation of different political entities and the elite and counter-elite groups on the most important and fundamental issues of the community. The level of instability of a political system can be determined by the degree of entropy of its parts. According to the Russian political scientist, Lokosov, every social system has a certain degree of entropy for every vital parameter beyond which the system as a whole collapses. Prior to that, we can observe that the main subsystems of society are approaching their limited values, which is a clear indicator that society is in crisis.

According to Ivar Kolstad, political instability can be threefold. The first type of instability refers to the lability of a government and the frequent change of political elites. The second is related to the level of political violence and protest activities in society caused by violence. The third form of instability is not focused directly on the stability of the regime itself, but on the instability and inconsistency of the policy it pursues (Kolstad 2008).

Political stability can be viewed in two ways: as a state and as an ability or function. According to the first approach, political stability is “the state of the political life of a society manifested through the reliable functioning of all political institutions that exist in that society, through respect for legal, political, and moral norms and the most important social traditions built through history and peaceful conflict resolution, which enables the system to function efficiently and develop while preserving its structure and qualitative characteristics” (Irhin 2002, 338). The definition of political stability as a function refers to the ability of the system to function and be maintained without significant, especially sudden changes. Practically, it is the ability to reconcile different interests, build mechanisms of cooperation, tolerance, and understanding, and coordinate group and corporate political activity.

According to Professor Vasilik, “political stability is a constant state of society that ensures it functions efficiently and develops in conditions of external and internal influences while preserving its structure and ability and controlling the processes of social change... The state of political stability cannot be seen as permanent, unchanging, and given forever. Political stability is manifested as a qualitative state of social development, as a certain social order governed by the system of ties and relations that express a common pursuit of goals and means for their realisation. At the same time, stability represents the ability of the subjects of socioeconomic and political life to oppose internal and external factors aimed at disintegration and neutralisation of the system” (Vasilik 2005, 217–218).

As already pointed out, the stability of the system can be affected by a number of factors. Political destabilisation is possible both “from the top” and “from the bottom”. Threats to political stability can be linked to the weaknesses of the regime itself, i.e., to the conflict potential within the ruling elite, as well as to the protesting mood in society itself. Strong and efficient political institutions can prevent the consequences of dissatisfaction in a timely manner and thus prevent it from leading to political instability. In contrast, weak political institutions are unable to cope with forms of destabilisation “from below”, which often leads to the disintegration of the political system.

However, political instability, except under the influence of internal factors, can also occur as a result of the activities of external forces. In the modern world, both causes of instability are related and conditioned. On the one hand, many internal problems, traditionally considered intrastate, take on an international character, while on the other hand, the destabilisation of certain relatively stable political systems can be caused externally by other states with the support of the internal opposition.

## **The state as the basic subject of the political system**

Regardless of all the factors that can influence the condition and character of a political system and the fact that it is a set of many factors and subjects, the state still has the main and unavoidable role in ensuring political stability. Like most important political phenomena, we encounter the notion of the state with very different, often contradictory meanings (Mladenović 2002). One of the objective reasons for that is, of course, its distinct interdisciplinarity.

The philosophical understanding of the state is based on the perception of the relationship between an individual and the community in which that individual, as a rational being, lives and influences the lives of others. The essence of the ancient political-philosophical view (especially with Plato and Aristotle) comes down to the understanding that an individual is not enough by himself and that he must therefore live in community; that an individual is by nature a state-building and social being; that the measure of the greatness of a truly human community is its self-sufficiency (autarky); and that the condition for the existence of such a human community is the structural separation of the public and private spheres. An important feature of the state is its purposefulness. Therefore, it precedes an individual who, without the state, is either a “beast or god” (Aristotle), since the former does not need the state yet, and the latter does not need it

anymore. Living politically in the ancient period meant searching for what was useful and just for the whole community. The state, therefore, was not a collection of randomly gathered individuals, but an order based on justice. And for Hegel, the state is “a whole that purposefully precedes its parts: the family and civil society” (Tadić 1996, 316).

Within the legal approach to the state, the ideas of rational natural law dominate, from which, over time, the notions of “legal state” and “rule of law” have developed. The philosophical basis of these understandings is the “theory” of the social contract, according to which the state is the result of a hypothetical contract between free and equal citizens and holders of power. As the contract is a legal relationship based on the autonomy of the contracting parties, their full equality is assumed. Unlike the philosophical approach to the state’s creation, the legal point of view emphasises the individual before the community. This anti-state “germ” later evolved into numerous understandings according to which the state is a necessary evil rather than a common good, such as by Thomas Paine (Paine 1989).

Most representatives of the “theory” of the social contract believe that state power must be limited in favour of individuals and that citizens have the right to resist if the ruler violates the agreed norms. By overcoming the absolutist rule, the “theory” of natural law and the social contract is transformed into the concept of constitutional law; that is, it manifests itself in the form of constitutionality and legality. The form of community conceived in this way later acquired the characteristics of a “legal state”. At the same time, the issues surrounding the content of the rights remain essentially irrelevant.

The political interpretation of the state’s creation starts by determining the real relations of power between social groups in the community and considering various aspects of the struggle for dominance in a particular area. During the period following the disappearance of absolutist monarchies, that is, at a time when there is a clearer differentiation between secular and spiritual authority, more serious teachings about the state as a “rule or command of the people” (Machiavelli) have developed. Since class monarchies were rather unstable forms of unity, the state —*statio* (from the Latin *status*—state, that which is permanent and stable), “as a political creation, emerges only when the unstable and inconsistent government becomes permanent and stable” (Tadić 1996, 321). The pre-state situation, which Thomas Hobbes describes as *Bellum omnium contra omnes*, was a condition of primary equality because everyone had equal rights to all. The state government, which prevents conflicts between people and guarantees security, i.e., protects limited freedoms, in turn, demands absolute obedience. Viewed in this way, it is, in essence, an organised form of inequality,

which, according to Hobbes, is not unjust because it curbs the passions and lusts of people that can lead to mutual extermination. For the Russian philosopher Nikolai Alexandrovich Berdyaev, a state is an institutionalised form of inequality consciously accepted because “a huge mass of people do not like freedom at all and do not seek it”, and since it is “afraid of freedom” (Berdyaev 1991, 57), it consciously gives in to someone who can, in return, guarantee its peace.

Understanding power as the victory of human reason over instinct is the first reasoned form of state legitimacy. In essence, resolving the relationship between the position of individuals and the purpose of the community, i.e., the problem of tension between freedom and order, is one of the central issues in the science of politics from Socrates to the present day.

“The problem is to find a form of association which will defend and protect with the whole common force the person and goods of each associate, and in which each, while uniting himself with all, may still obey himself alone, and remain as free as before. This is the fundamental problem to which the *Social Contract* provides the solution”, Jean-Jacques Rousseau points out in his famous work “Social Contract” (Rousseau 1978, 101).

The establishment of such a community, in essence, is a process of institutionalisation of that kind of political power that ensures its survival by relatively democratic means (persuasion, rewarding, spiritual manipulation). Since the state of power has always been relative and temporary, the social group that exercises political power must constantly take care of its maintenance. The great Jean Jacques warns: “the strongest is never strong enough to be the master forever unless he transforms strength into right and obedience into duty” (Rousseau 1978, 96). The danger of losing the position of power arises from the eternal dilemma: whether it is necessary and what justifies the power of a man over another man. What influences people to follow other people’s orders and obey them even when they are not in line with their interests? For Bertrand de Jouvenel, “he who knows the reasons for subservience knows the inner nature of political power” (Encyclopedia 1993, 596).

Ensuring a political power’s activity on generally accepted principles entails, in essence, establishing the **legitimacy** of that political order. It is legitimate only if there is an agreement between the way of governing and the vision of order formed by the citizens themselves. No government can count on the stability and permanence of the system unless there is at least a minimum of internal or intimate consent of the subordinates. The etymological meaning of the term “legitimacy” (from the Latin noun *lex*—law, and the adjective *intimus*—close, immediate) indicates the need to harmonise the right to govern with the duty to

obey. “If the consensus and the will of the ruler and the subject are the same”, emphasises Johannes Althusius, “their life is happy and blessed” (Encyclopedia 1993, 595). In the conceptual relationship with the term *lex* (law), there is also the concept of **legality**, applied in the sense of what is in accordance with the law. In the tradition of Roman political philosophy and classical jurisprudence, the terms “legitimacy” and “legality” were mostly used as synonyms and represented the basic quality of valid rule. The development of the doctrine of legal and political positivism in the eighteenth and nineteenth centuries led to a clearer separation of the meanings of these terms. German classical political philosophy directs the essence of the problem in the direction of the differentiation of legality and morality. Immanuel Kant, for example, thinks that legal behaviour is not determined by motives, but only by fear of harm or sanction, i.e., an external commandment that deprives us of our own responsibilities of choice. In contrast, moral behaviour is determined by the internal principles of “pure will”, which gives itself the force of law. Representatives of the political theory of the Enlightenment associate legitimacy with Jean Bodin’s sovereignty. Only a government that is in the interest of the common good and in which the ruler is the result of the free choice of the citizens is legitimate.

The ideas and ideals of natural-legal theory underpin the political-philosophical conceptions of the modern European state and the legitimisation of power. The basic thesis, in that sense, is related to the activity of reason as an inner human characteristic that is able to control and humanise human nature, inclinations, and behaviour. When considering modern political conceptions of legitimacy, we cannot ignore Max Weber’s theory that the legitimacy of a government should answer the question on what ultimate principles its validity rests. Every power, including power as an institutionalised power, must be justified in order to maintain its stability and permanence.

In essence, power is “legitimate if the mass of subordinates accepts it with explicit or tacit consent and if they perceive it as lawful and impartial” (Tadić 1996, 321).

The legitimacy of the state (political power) is an extremely changeable and volatile category that must be proven on a daily basis. However, this does not occur only at the national level, but rather at the international level. New worldwide changes imply a considerable growth in the necessity for an analytical notion of the “global risk society” (Stojanović, Đorđević 2017). The crisis of legitimacy is manifested by the inability to ensure mass loyalty and internal integration. Regardless of whether it has a democratic character or manifests itself in an authoritarian form, political power is inextricably linked to power, which, among other things, is used to prove its legitimacy. Legitimacy necessitates

legitimation, emphasises Ljubomir Tadić (Tadić 1996), implying that the government must constantly demonstrate the legitimacy of its existence. Power, as an essential feature of the government, in this sense, can be manifested as supremacy or a possibility (Čupić 1997).

Modern ruling elites in the struggle to achieve “mass loyalty” are increasingly trying to avoid the use of means of gross coercion that cannot have lasting meaning. Instead, they use more perfidious methods. As early as the 17th century, Machiavelli’s student, Arnold Clapmarius, explained to his master that fraud was the most reliable means of state skill. The basis of such a rule is empty rights (*iurainania*), which give subjects the impression that they have what they really do not have. In essence, each political power institutionalises its own forms and mechanisms of legitimacy. “If within the political system, there are opportunities (political capacity) to acquire the necessary material goods, provide a predominant influence on political communication, and periodically renew support in the field of the cultural subsystem, then the conditions are created to meet the prerequisites of procedural legitimacy” (Encyclopedia 1993).

Regardless of the theoretical conception or empirical character of an organised social community, in each of them, in a milder or sharper form, one of the fundamental aspects of the “first principle of politics” is clearly manifested, and that is the opposition of those who rule and those who are ruled. “The logic of power, i.e., hierarchy and domination, indirectly incorporates the individual into its pyramid and expects from him only precisely defined functional actions and behaviour” (Čupić 1997, 148). On the other hand, the individual-citizen has always tried to strengthen and maintain his full political and legal subjectivity in relation to state bodies and to make political power his own creation.

## **The sovereignty of the state in the conditions of globalisation**

The second important feature of state power is sovereignty. Regardless of the period and the concept in question, sovereignty in practice has always been limited by various influences. Today, the notion of complete freedom of action by the state, even in theory, seems quite unrealistic. The area of internal sovereignty is significantly narrowed by numerous international agreements. In practice, the state itself has established numerous areas of self-restraint, even in areas traditionally considered basic elements of sovereignty: regulating imports and exports of goods, setting customs and taxes, enacting rules for electing and



establishing government institutions, regulating freedoms and rights, and even deciding on the emission of money. Even the “sacred rule” of property is suppressed in the countries of the European Union by the abandonment of their own currency and the introduction of the euro. And the right to decide on war and peace, which for centuries has been considered the main feature of sovereignty, is today largely under international control. We are witnessing that the internal issues of the state, in which no one has interfered so far and which have been regulated only by internal law and customs, have significantly narrowed. Electoral processes, normative solutions, principles of organisation of the most important state institutions, and even the formation of government bodies, especially in the so-called countries of unconsolidated democracies, are heavily and often openly influenced by other states and international organisations. All of this beautifully demonstrates how little internal affairs have been left to the state to govern independently through the use of various kinds and methods of political technology.

Voluntary acceptance of international agreements, which, among other things, means limiting the sovereignty of rulers and states, is not new. From the Holy Alliance from the first half of the 19th century, through military blocs and various economic associations, it can be concluded that the processes of internationalisation are not new. However, the prevalence and strength of these processes, then and now, cannot be compared. Today, they are ubiquitous throughout the world. Economic alliances used to be rare, with fewer members. At the moment, it is the most frequent form of connecting states. Some of them, such as the International Monetary Fund or the World Trade Organisation, include most countries in the world. Many issues related to traditional internal problems are being resolved today by close and frequent contact between the leaders of some of the most influential countries in the world. A few countries can stay aside and have the privilege of pursuing independent domestic and foreign policies. The situation is paradoxical to the extent that even the governments of individual countries are more oriented and more accountable to international institutions than to their own citizens, by whose electoral will they have been formed.

It should be noted, for the sake of the truth, that most countries voluntarily agree to limit their own sovereignty, expecting real political, economic, and other benefits as a reward. The number of those deprived of part of their sovereignty in the process of “imposing democracy” is not small. As a result, the state ceases to be the primary entity on its own territory capable of using legal coercion to maintain its own order. The regulation of a man’s and citizen’s liberties and rights, environmental policy, financial regulation, informing and creating public opinion, the educational system, and so on are all taken away from the state.

Despite the fact that the state remains the fundamental unit of historical, political, cultural, and economic existence, many powerful forces are causing it to gradually lose some of its traditional positions and give way to larger supranational institutions. This trend will certainly continue in the future. However, it would be incorrect to conclude that this is a one-sided and unambiguous process. Essentially, sovereignty will decrease and disappear in many segments, but there are also elements in which it will be preserved and even increase. Therefore, it is unjustified to rush to declare the death of the nation-state. It will be one of the leading entities for a long time to come because, as some researchers point out, the sudden shortening of sovereignty and the annulment of traditional state functions can easily lead to chaos (Kilibarda, Mladenović and Eisenhammer 2014). Global trends have given rise to a large number of new non-traditional security risks and have confirmed old, but also modified, security issues in the security space, in which infectious diseases occupy a very high position. Cyclical pandemics, which have caused five major threats in the last two decades—SARS, MERS, Ebola, bird flu, swine flu, and the current COVID-19 pandemic—were a reality in the twenty-first century. This type of risk, with the impossibility of its complete control, is primarily a consequence of climate change, globalisation, urban movements, socio-economic context related to the crisis, poverty, and migrant movements in the field of endemic risks (Jeftić, Mandić 2020, 266). This especially refers to new forms of the viruses, such as the case of COVID-19, which affected the whole world and which is why a pandemic was declared. The state has, perhaps more than ever in the last two decades, proved to be the most important factor of action, which can take all the measures necessary to stop the spread of the virus and protect people's lives (Obradović, 2020b, 128).

In all this, it must be borne in mind that the division of the world into the centre, semi-periphery, and periphery remains the basis of relations in the international community. In that sense, modern states can also be viewed in relation to this "caste division" (M. Pečujlić). According to Professor Vučina Vasović, all countries in the era of globalisation can be classified into four groups. The first group consists of large and powerful states that are the leaders, founders, and helmsmen of globalisation. Moreover, their power goes beyond the limits of international law and the power of international organisations. The second group includes some smaller and weaker countries that enjoy the support, help, and protection of the most powerful. The third group is composed of countries that powerful international factors regard as neutral, while the fourth group consists of countries that have fallen out of favour with some large and powerful countries due to some unfortunate circumstances (Vasović 2010). In other words, sovereignty today is a largely relativised notion. This is best confirmed by NATO's

aggression against the FR Yugoslavia in 1999. Although, in essence, a local issue of a sovereign country, the right of members of the Albanian minority in Serbia and the FR Yugoslavia was internationalised. It served as a motive for the bombing of a sovereign country, separating part of its territory and placing it under international and civilian-military administration (Obradović 2017, 627–644; Obradović 2020a, 176–200).

## State and society

When we look at the whole of the social community (and not just the state), we must not forget that the logic of any political power, and even of a theory (except liberal), is directed against the independence of the individual as a basic factor of the social community. Power, by its nature, is always based on hierarchy, mediation, and domination, and it accepts autonomy, uniqueness, independence, and diversity only to the extent that they do not endanger the basic principles of its functioning and survival. The result is, among other things, shaping the individual to live in a community tailored to its ruling elite.

For Plato, Aristotle, Kant, and others, human nature can be manifested and fully realised only in the community. Hegel believes that true independence consists “in the unity and permeation of individuality and generality, because generality acquires concrete reality also on the basis of the individual, just as the individual and special subject only in general find an unshakable basis and the true content of their reality” (Hegel, 1970). At the other end of this spectrum are Nietzsche and his followers, according to whom the individual is sovereign, similar only to himself and free from all influences and norms imposed on him by the community in the form of generality and universality. In essence, “living in a community allows a person as an individual to grow into an individual as a person, but at the same time, it opens up the possibility of a person losing their identity and drowning in one of the many social groups. The drama of an individual’s life in a community is full of perils and risks since society simultaneously cultivates and enslaves him” (Čupić 1997, 148).

Apart from belonging to the community, which the individual selects based on its affinities and requirements (with the exception of the “natural”), the individual is also a member of society. Although the categories “community” and “society” have a number of commonalities and, according to many criteria, similar features, the terms they denote are not synonymous.

By “community”, we mean a group of people connected by relatively strong ties of interest, spiritually close and consciously committed to acting together. Important features of the community are a sense of commitment to the collective and solidarity among members.

“Society” is a broader concept and, as Max Weber points out, it is based on a rational compromise of interests and their connection. In relation to the community, there are categories in society, such as private interests, competition, uniqueness, etc., that are more present than solidarity and togetherness. Society is the broadest and most complex human association that encompasses all forms of connecting people in a certain area, where numerous social processes take place and various social creations are formed. When we talk about the social community today, in addition to the state, the functioning of civil society deserves special attention.

During the ancient period, the terms “politeia” (a Greek term) and “res publica” (a Latin term), which correspond to today’s notion of civil society, referred equally to the state and society. The term “civilis societas” was also used by Marcus Tullius Cicero, denoting a human community that is sufficiently developed and organised (it has its own cities and institutions) so that citizens can live and work in it guided by existing laws.

The relationship between the state and civil society today is one of the most important indicators of the character of a political system. In his famous work “Two Treatises of Government”, John Locke views society as an independent entity, i.e., a political body that elects and controls its own government. The government thus formed has very limited rights in relation to the community. According to him, society is primary, and the government is only a necessary institution that must adhere to established rules in its work and is always subject to control. The distinction between civil society and the state was most strongly expressed by Thomas Paine, emphasising that society is “the product of our desires and the state of our mistakes; society encourages our happiness by positively uniting our feelings, the state by negatively limiting our shortcomings. One encourages socializing. The other creates differences. Society protects, the state punishes” (Paine, 1989).

The relationship between the state and civil society depends on a number of economic, political, and spiritual characteristics of society. In his book “Democracy and Civil Society”, John Keane singles out some of the most important models of these relationships. The first, which is theoretically related to Hobbes, gives primacy to a state that in fact unites both political power and civil society in a single factor of negating the natural state and ensuring acceptable peace for all.

This model is expressed through the **security state**. The second version, which is closest to Locke's conception of the organisation of society and the state, solves the relationship between civil society and the state through the institution of the rule of law. The **constitutional state** corresponds to this model. The third conception, most strongly advocated by Thomas Paine, gives a distinct advantage to civil society over the state. Here, only the most necessary social activity is left for political power, and its embodiment is the **minimum state**. In addition to these three basic models, a whole range of different variants of the relationship between the state and civil society can be set, which correspond to the **universal state**, the **liberal-democratic state**, or any other state (Mladenović 2002).

Despite various prophetic announcements and ideological revelations, the state remains the centre of political life in the (post) modern era. It is the state that creates and maintains the interconnectedness of individuals in modern society and defines the unity and scope of various institutions, while the traditional relations of order and obedience, authority and legitimacy, continue to be imposed as necessary. At the same time, every political creation, such as the state, realises its identity in comparison to other, similar political bodies. In short, states are always particularistic and, as such, are usually exclusively inclined political entities. The purpose of their existence is to establish a certain ("true", "authentic", etc.) order that overcomes the anarchy of lawlessness and is in accordance with the conceived but achievable idea of justice (unity with the cosmic order, God's providence, general equality before the law, etc.). The entire history of political philosophy has been a constant debate over which political order is truly best suited to man and his nature. At the same time, the notion of freedom always comes to the fore, of course, with different interpretations and numerous mutual exclusivities. The modern age has contributed to that centuries-old debate with an old motive, now shaped in a new way and, as such, especially emphasised security (Cvetković 2010).

## State and non-state elements of the security system

Nowadays, due to a number of historical circumstances, the word "security" has become one of the most frequently used and exploited terms. In the colloquial understanding, the term "security" is understood as the desired state of the non-existence of threats, a state characterised by the absence of danger and fear, and a state of achieved stability and security and the imperative to achieve them. The phenomenon of security appears in a multitude of forms and contexts, which

explains its various forms and contents. Etymologically, the term “security” comes from the Latin word *securitas –atis*, which means the absence of danger, security, safety, certainty, self-confidence, fearlessness, protection (*securus* – Latin – safe, secure, reliable, fearless, confident, steadfast, firm, loyal, true, etc.) (Stajić 2008).

Although there is no consensus in science about the approach to the phenomenon of security, and even less in terms of its definition, the scientific community is almost unanimous that the term “security” is a term with multiple meanings, i.e., used to denote a much wider number of phenomena than its traditional meaning, which was primarily related to the survival of the state and the protection of its sovereignty primarily from external threats and war. Also, it is generally accepted that this is a socially constructed concept that gains its specific meaning only within a certain social environment, i.e., security cannot be separated from the general context in which the state and society exist and function.

In the earlier period, security was the exclusivity of the state, but the character and depth of the socio-political and historical-civilizational changes in international relations in the last decade of the previous century conditioned (and imposed) a radical change in security theory and practise, primarily the concepts of national and international security. Today, security, as a multi-layered phenomenon structured in many different ways, encompassing all spheres of state and social existence, does not represent only the state of an entity in the absence of threats and fears (conflicts, threats, physical violence), but an instrumental, separate, indivisible value, as a way to achieve something. In addition to the state, national, political, and military spheres, it also contains the social, economic, cultural, moral, ideological, normative, and other elements. The majority of the factors stated have aided in the de-sovereignisation of a huge number of countries in the Eurasian landmass, which occurs as a result of tectonic shifts in the modern security environment (Fatić 2012).

In modern conditions, security is becoming the subject of the theoretical preoccupations of a large number of authors and theorists of all profiles and orientations, which has resulted in the consideration and knowledge of security phenomena in a much broader context, as well as the emergence of many different theoretical approaches.

However, the proliferation of security theories and concepts has not resulted in the constitution of a reliable, generally accepted model in the interpretation of this term and the phenomenon to which it refers. The amplitudes of theoretical considerations range from traditional, realpolitik, and the so-called state-centric model, to a wide range of more liberal approaches that revise the traditional

definition of security and shift the focus from the state to the social community and the individual. Proponents of the theory of human security criticise the traditional security paradigm that emphasises the state as a reference object of security, stating that it is anachronous and insufficient in terms of the security of citizens and their well-being and must be replaced by the concept of so-called human security, which deals with the lives of citizens, their dignity, rights, and freedoms, and sustainable development, which, in one word, is focused on people – individuals.

As stated, during the development of the international community, security models have changed and evolved. So, nowadays, the term “security” has multiple meanings, i.e., it is used to denote a far broader term than the “traditional” meaning associated with the military segment of a state, i.e., the absence of conflict (war) (Stajić 2008).

Scientific efforts to determine new parameters of the concept of security are only one side of the security dimension, while the other side is the institutional framework through which security is achieved, as well as the definition of reference objects of security. From the functional, organisational, and normative aspects, the process of creating a security system is extremely complex, and its growth into a new quality is determined and conditioned by connecting the political, economic, social, cultural, and legal dimensions. However, this process is not paced or uniform, but acts asymmetrically and varies in intensity and effects, which is a direct consequence of the fact that security issues are articulated on several levels: local, regional, international, and transnational, based on different standards, which implies the conclusion that one cannot speak of coherent and universal models and patterns of security systems (Milosavljević 2014).

On the other hand, modern events in the world have largely contributed to the fundamental re-examination of the concept of response to possible security breaches. Terrorist attacks in the United States have radically changed the scale of values of the subjects of the security protection system. The myth of the global hegemony of the United States and the omnipotence of its armed forces has been shattered. Until 2001, the difference in US military power over all other subjects of international relations gave the American administration hope that it would dominate the international scene for a long time to come and be the undisputed judge in all international disputes in which it had an interest. However, after the terrorist attacks on its territory, the vulnerability of the United States has become a new factor in world politics. Doubts that did not exist before have now arisen! The question is: why does the United States have the most powerful weapons (tracking from space, colossal warheads, invisible planes, global radar command systems, etc.) when an opponent, armed with a knife, can simply buy a ticket for

a domestic airline and endanger thousands of American citizens? Before our eyes, there has been a radical change in the nature of security risks and threats. Despite the \$50 billion spent on US intelligence services, there is still no accurate information and reports on who carried out the attack, who coordinated it, for what goal, and with what objectives (Mijalkovski, Konatar 2013). With the terrorist act, the terrible truth was revealed: the traditional system of deterring adversaries simply does not work any longer.

It turned out that the North Atlantic Treaty Organisation, whose unique efficiency and power were constantly reckoned with, was, in fact, an ineffective military and foreign policy instrument for modern conditions. Namely, NATO was founded as a military organisation that is the guarantor of the security of Western countries. At the end of the 20th century, NATO formally became a factor of global security and an essential factor of security in the interests of Western countries. In modern conditions, it turned out that his organisation was not enough for a successful operation. Of course, even now, the data on military potential are frightening, but time is increasingly confirming that the old alliance is capable of solving only old tasks. You cannot threaten your opponent with destruction if he is not afraid of dying!

The opposition of world civilizations came to the fore. Until September 11, the differences in culture, language, and traditions of the seven world civilizations were mainly the subject of ethnology and cultural studies. After September 11, civilizational differences became one of the major factors in world politics. The world is shifting its gaze to the East! The civilizations of Islam, China, and Hinduism have all become increasingly active in recent years. Fukuyama appears to have been a tad premature in his broad judgement regarding the end of history! Huntington's claim of the clash of civilizations turns out to be based on various factors. Alexander Zinoviev said that "the time will come when the mullah from the Eiffel Tower will call on Allah!" (Zinoviev 2011).

True, in earlier periods, considering the elements of the security system, we talked about its three basic elements: the state, society, and individuals. Undoubtedly, most of the time, the main factor was the state. It took practically all the care of ensuring external and internal security, thus suppressing the other two subjects. Modern events in the field of security, and above all the new challenges and threats that appear in the world, inevitably indicate the need to think about new solutions in the field of security, including changing the positions of key actors. There were solutions in different epochs and in certain parts of the world that deviated from the usual cliché, such as the system of national defence and social self-protection in the SFRY, but these attempts remained unfinished, lonely, and without significant impact on the environment.



The new security situation in the world again suggests thinking about the re-composition of the national security system in the sense of more complete engagement and non-state institutions. This is all the more important because, as previously said, the state's political role in modern times has altered dramatically. Starting from the fact that civil society is not the same as the state and that these two elements of the human community can be in different relations, we come to the conclusion that, depending on the model of relations between them, we can talk about the redistribution of basic actors in the national security system. Only the simultaneous and coordinated functioning of state and non-state elements of national security can ensure the stability of the system and protect society and the state from divisions, social upheavals, riots, and other forms of threats.

## **Concluding remarks**

Some authors argue that if the balance of power system is replaced by a unipolar world, the system itself will be more stable and secure (e.g., Kindleberger 2013). But if we observe the post-Cold World international relations that have been marked by such polarity, not only has this polarity not led to a more stable and secure international system, but, on the contrary, it has led to the greatest insecurity and uncertainty of humankind since the times of the Second World War.

Security challenges have their projections, regardless of whether we observe them on a national or international front, which, in principle, can narrow or even disable the possibilities of purposeful state action. The reasons for this cannot be reduced solely to the process of globalisation that has made national borders porous and the possibility of reactions narrow. We must take into account the security threats the state faces in current circumstances. National defence systems are sometimes unable to recognise real threats to national security and, more often than not, also lack adequate capabilities for adequate and timely action.

In a unipolar world, the possibility of small states defending their sovereignty from threats stemming from hegemonic powers and their allies seems virtually impossible. On the other hand, in a multipolar world, the possibility of unilateral action by one or more states is significantly smaller, but one should bear in mind that this does not mean that security threats to other states are non-existent. Besides already existing security challenges and threats, the world now finds itself in front of new and, up to that point, unknown challenges and threats. Among them, the most significant ones are: an uncontrolled escalation of armed conflict;

the global economic crisis; international terrorism; the proliferation of nuclear and other weapons of mass destruction; an increase in drug trafficking; illegal migrations; criminalisation of different spheres of social life; and, as the pinnacle of mass endangerment, the COVID-19 pandemic.

Therefore, no matter how much one state strengthens its security system, it is objectively not able to confront new security challenges alone. Cooperation with other states, data exchange, coordination of joint activities, as well as joint action in general, represent the only ways to successfully confront security challenges and achieve the stability of the national security system.

This is all the more true given the current position of the nation-state, viewed in the context of globalisation, which is characterised in many areas by a reduction in its regulatory function in favour of other social subsystems. This means that the essence of state sovereignty has been largely changed and, in some cases, even questioned.

Globally, it can be said that the total power of nation-states has remained the same, but it is distributed asymmetrically. While some countries have virtually lost their sovereignty and become “fragmented” states, others have risen above the usual possibilities for the nation-state and become the “functional equivalent of a world government.”

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**Žarko OBRADOVIĆ**  
**Miroslav MLADENović**

**BEZBEDNOSNA KOMPONENTA STABILNOSTI DRŽAVA  
NA NACIONALNOM I MEĐUNARODNOM PLANU**

**Apstrakt:** U radu se analizira problematika političke stabilnosti u kontekstu promena pozicije glavnih političkih subjekata. Izmenjena uloga nacionalne države u uslovima globalizacije, neminovno se odražava i na poimanje i stanje fenomena bezbednosti. S druge strane, broj i karakteristike bezbednosnih izazova i pretnji značajno se povećao. Pored, od ranije prisutnih problema, došlo je do povećanja narkotrafikinga, nelegalnih migracija, porasta trgovine ljudskim organima, eskalacije piraterije i kriminalizacije različitih sfera života. Zadnje dve godine svet se suočio i sa novim globalnim bezbednosnim problemom, ovog puta u oblasti zdravlja – pandemijom kovida 19. Praksa je pokazala da je (u većini slučajeva) nacionalna država postala slabija i nesamostalnija a njoj odgovarajući, državnocentristički sistem bezbednosti, neefikasan, skup, glomazan i neadekvatan mnogim novim pretnjama. Snaga ovakvog zaključka proističe iz analize funkcionisanja sistema nacionalne bezbednosti u uslovima terorističkih napada, ali i iz izučavanja mehanizama rušenja suverenih država pod presudnim uticajem spoljnih faktora.

**Ključne reči:** Politička stabilnost, država, bezbednost, sistem nacionalne bezbednosti, nedržavna bezbednost.



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# The role of Turkey in the second Armenian-Azerbaijani armed conflict over Nagorno-Karabakh as a reflection of continuity and change in its foreign policy

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**Abstract:** The article examines Turkey's role in the conflict over Nagorno-Karabakh that erupted between Azerbaijan and Armenia in September 2020. It analyses how changes and continuity in Turkey's foreign policy have influenced the conflict's outcome, as well as the extent to which it has been exploited to fulfil Turkey's foreign policy objectives. Thus, unlike most research on Nagorno-Karabakh, this article focuses on the role of one external actor, and not on the conflict itself or possible hypotheses for its resolution. The article's special focus was influenced by the fact that Turkey's participation resulted in a change in the long-standing status quo in Nagorno-Karabakh, allowing the situation to turn dramatically in Baku's favour. Turkey, along with Russia, has emerged as one of the most important regional players in this conflict. This is the result of Turkey's emphasised foreign policy ambitions, which were influenced by changes in its international security environment as well as changes in the country's domestic policy. In any case, with its role in the second conflict in Nagorno-Karabakh, Turkey has once again shown its determination to pursue its foreign, and especially regional, policy independently and in accordance with its national interests, despite being a member of NATO.

**Keywords:** Turkey, Nagorno-Karabakh, Azerbaijan, Armenia, Russia.

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## Introductory remarks

The unresolved territorial conflict between Armenia and Azerbaijan over Nagorno-Karabakh is not only interstate but also interethnic, with clear international ramifications. Disputes over this land began in 1988, and after the fall of the Soviet Union, they took on an international dimension, culminating in the war between Azerbaijan and Armenia in 1992. The conflict ended in 1994 when a truce was reached through Moscow's mediation (Jović-Lazić and Lađevac 2013, 62-63). The diplomatic effort led by the OSCE Minsk group failed to persuade the presidents of Azerbaijan and Armenia to accept admissible compromises. Despite extensive conversations and many alternatives having been provided to the opposing parties during this process, a mutually acceptable agreement could not be achieved (Jović-Lazić, Jelisavac-Trošić and Jazić 2011). Resolving this issue is hampered by ethnic nationalism in both countries, which have sharply opposed views on how to resolve it, as well as competition from other regional actors, particularly Russia and Turkey, both of which have geopolitical interests in the region. As a result, this conflict has long been regarded as one of the most complex and difficult to resolve in the post-Soviet region (Jović-Lazić 2021, 212).

In this dispute, Turkey plays the most complicated and contentious role. Due to Turkey's cultural and linguistic ties with Azerbaijan, which are reflected in the nationalist and pro-Turkish mood in domestic politics as well as historical animosity towards the Armenians, the country's policy towards the Nagorno-Karabakh conflict has always been pro-Azerbaijani. However, during the first armed conflict, Ankara tried to remain restrained in official statements. Even after the end of hostilities, Turkey's entire foreign policy relied primarily on soft power instruments, using cultural proximity and regional economic engagement to change regional dynamics in its favour (Kutlay and Öniş 2021, 3055).

There were legitimate concerns when the hostilities started in September 2020 that they might be internationalised, especially taking into account Russia's military presence in Armenia and Turkey's support for Azerbaijan. Despite Russia's decision to remain neutral, Turkey, unlike in the previous conflict, chose to take an active role, clearly siding with Baku. Furthermore, Turkey's political, intelligence, logistical, and military support, particularly the delivery of advanced armaments and drones, is credited with Azerbaijan's decisive victory in Nagorno-Karabakh (Kınık and Çelik 2021, 169). Turkey also indirectly got involved in this conflict by recruiting Syrian mercenaries to fight on the side of Azerbaijan. As a result, Turkey has once again shown that its foreign policy has changed significantly and that it now relies on the instruments of hard power.



The outcome of this armed conflict altered the power balance between Armenia and Azerbaijan on a local level. Also, it influences the regional one, demonstrating that Russia is no longer the region's only unchallenged power. With that in mind, the purpose of this article is to assess Turkey's policy, activities, and interests in Nagorno-Karabakh as well as to examine the reasons that led Ankara to openly support Baku, unlike in the previous conflict, and the possible consequences of such a decision.

A quick recap of Turkey's policy during and after the first armed conflict in Nagorno-Karabakh is provided before looking deeper into Turkey's role in the renewed armed conflict. Following that, it is examined how historical changes have influenced Turkey's domestic policy and, as a result, the continuity and changes in its foreign policy. In that context, the article briefly looks at the influence of the Ottoman heritage, the formation of the republic, the Cold War period, the 1990s, as well as the period from 2002, i.e., since the Justice and Development Party (AKP) came to power. Special attention is paid to changes in Turkey's domestic and foreign policies over the last few decades, which have influenced its foreign policy toward the Nagorno-Karabakh conflict, among other things.

Turkey's foreign policy is examined using the neoclassical realism theory. In his famous 1998 article, in which he coined the term "neoclassical realism," Gideon Rose wrote, "Foreign policy choices are made by... political leaders and elites, which is why their perception of relative power is important." (Rose 1998, 146). As a result, unlike neorealism, this theory of foreign policy is predicated on the notion that a country's foreign policy must take into account domestic variables, and since the analysis involves the concept of "perception," it contains constructivist elements. This can contribute to an understanding of Turkey's foreign policy and its position in the unresolved Nagorno-Karabakh conflict (Şahin 2020, 488).

Because the conflict in Nagorno-Karabakh is not a new one, it has been frequently discussed in scientific publications. However, most research focuses on the political situation in Nagorno-Karabakh, which is usually written about in the broader field of research on the dynamics of unresolved conflicts in the post-Soviet region, most often from the perspective of Russia and its foreign policy interests (Abushov 2019). There are also articles that discuss the factors that have prevented a possible resolution of this conflict for decades (de Waal 2010; Özkan 2008; Pokalova 2014; Babayev and Spanger 2020). Then there are articles that look at this conflict in the context of broader security challenges in the Caucasus (German 2012). Furthermore, because the subject of this research includes an analysis of the continuity and changes in Turkey's foreign policy, which subsequently resulted in changes in the long-term status quo of this conflict, books and articles on the country's foreign and domestic policies, in general, are important (Tanasković 2010;

Tanasković 2021; Cornell 2012; Aras 2014; Haugom 2019). There are also articles dealing with Turkey's relations with Eurasia as well as with the Caucasus (Aras and Fidan 2009; Aras and Akpınar 2011; Gajić 2013). These articles, however, only provide fragmentary or otherwise incomplete insights into the research issue because, despite the long-standing seriousness of the situation, only a limited number of scientific publications deal with Turkey's role in this unresolved conflict (Cornell 1998). Because Turkey has only recently emerged as a major player in this conflict, its role in the literature has received limited attention. In that context, the purpose of this article is to contribute to research on the specific framework of Turkish engagement in Nagorno-Karabakh.

### **The position of Turkey during and after the first armed conflict in Nagorno-Karabakh**

Analysing Turkey's positions in the first Nagorno-Karabakh conflict is key to identifying changes in its regional and foreign policies in general, as well as its role in the renewed conflict. At the same time, Turkish policy cannot be considered separately because this conflict is related not only to Armenian and Azerbaijani interests, but also to the interests and strategies of other geopolitical actors in the region. Because Nagorno-Karabakh was formerly part of the Soviet Union, Russia is unquestionably the most important of them.

Turkey's attitude towards the Nagorno-Karabakh conflict is also influenced by the significant cultural and linguistic closeness Azerbaijan. This became noticeable in the second half of the 1980s, during the early Nagorno-Karabakh disputes. The Azerbaijani Popular Front (APF) was founded in 1988 in the Socialist Republic of Azerbaijan during Perestroika, which inspired national awakenings throughout the Soviet Union. Although Turkey tacitly supported the AFP, fearing retaliation from Moscow, official Ankara remained reticent, pointing out that the Nagorno-Karabakh conflict was solely an internal matter of the USSR (Souleimanov and Evoyan 2012, 16).

With the collapse of the USSR, Moscow's power was significantly reduced, which created the conditions for other regional actors to achieve their foreign policy goals and interests. In the case of Turkey, this interest is, above all, the result of a concern for its own security because it views the South Caucasus as a "buffer zone" towards Russia. Also, this region is important for Turkey because, through cooperation with Azerbaijan, it provides an opportunity for the realisation of energy projects and a new energy corridor for the transport of Caspian energy to the West.

Also, the South Caucasus connects Turkey with the countries of Central Asia. Finally, Turkey is interested in this region because of its cultural and linguistic closeness to the Turkophone peoples of the South Caucasus. As a result, as soon as the international order changed, Turkey tried to develop influence in the region, focusing its efforts on the building of comprehensive relations with the newly independent states. It did so with the full support of the West, which saw Turkey as a suitable counterweight to Russia's and Iran's regional influence (Cornell 2001).

With the disintegration of the USSR, this conflict grew into an armed conflict between two independent states, but Turkey, as part of NATO, sought to pursue a policy in line with that of its Western allies. Turkey has made important efforts to put this issue on the OSCE agenda by deploying shuttle diplomacy and portraying itself as an unbiased mediator. However, despite its best efforts, Turkey failed to keep an equal distance between the conflicting parties, which was greatly affected by the atmosphere in the country. With Armenia's military advance, pro-Azerbaijani sentiment, nationalism, and internal pressures from the general public grew in Turkey. Criticism of the government's attitude towards Armenia has become louder, claiming that it is contrary to Turkey's efforts to become a significant regional power. Large anti-Armenian protests erupted, and protesters demanded Turkish military intervention on the side of Azerbaijan. Unable to ignore public pressure, Ankara soon began, albeit passively, to support Baku. It also used its ties to draw Western governments' attention to the conflict and promote a pro-Azerbaijani stance. After estimating that the Armenian army was threatening the Azerbaijani exclave of Nakhichevan, Turkey claimed in May 1992 that the Kars Treaty (1921), which made it the guarantor state, required Turkey to protect it. A year later, the Russian Seventh Army was sent to the Armenian-Turkish border after Turkey had stationed troops on the Armenian border, which Russia saw as a direct military threat (Coyle 2021, 44).

However, as Cornell noted, Turkey's support did not mean a threat of military intervention or open assistance in supplying Azerbaijan with weapons or financial resources that would enable it to buy them. Turkey, like its Western allies, feared that its direct military involvement would provoke an armed conflict with Armenia, potentially escalating into a Turkish-Russian war. As Cornell further pointed out, Turkey's response to the first conflict in Nagorno-Karabakh was shaped by its complicated relations with the West and Russia, as well as the Kemalist philosophy, which emphasised avoiding foreign conflicts. Furthermore, Turkey's ability to pursue a truly independent policy in the region was hampered by the fact that it had to consider the positions of NATO, the EU, and Russia in this conflict (Cornell 1998, 60-68). All the more so since, when Russia and Armenia signed a collective security pact in Tashkent in 1992, they promised mutual support in the event of a

third-party attack. As a result, Turkey's military engagement would have major ramifications for the country, impacting not just its relations with Russia but also with NATO, the US, and Europe (Coyle 2021, 44).

However, Turkey, a member of the OSCE Minsk Group, has expressed complete solidarity with one of the conflicting parties. Simultaneously, it took every opportunity to promote Azerbaijan's perspective on the conflict in international forums, closed the border, and refused to normalise relations with Armenia until that country returned the occupied territories to Azerbaijan (Cheterian 2017). Ankara, in collaboration with Baku, blocked Yerevan's participation in all major regional projects, including the Baku-Tbilisi-Ceyhan oil pipeline and the Baku-Tbilisi-Erzurum gas pipeline, both of which were launched in 2006. Azerbaijan saw any change in the network of regional ties as undermining its policy of pressure on Armenia, given that it had isolated Armenia and expected to be forced to compromise. As a result, it was deeply opposed to attempts to open the borders between Turkey and Armenia. In particular, in October 2009, Armenia and Turkey signed two agreements in Zurich that were expected to lead to the normalisation and opening of Turkey's and Armenia's borders. Due to the majority of the ruling class's attitudes, as well as Azerbaijan's reaction, which threatened to withdraw from energy cooperation projects with Turkey, these protocols were never ratified by the Turkish parliament. With Turkey wanting to use its geostrategic position to build more oil and gas projects in order to become a critical Eurasian energy corridor, Erdogan promptly warned that relations with Yerevan could not be mended unless its forces withdrew from Azerbaijan's occupied territories. This demonstrated that Azerbaijan can obstruct the opening of the Turkish-Armenian border and that Ankara cannot shape its policy in the region without an agreement with Azerbaijan. Turkey has continued to keep Armenia out of all major energy and transportation projects in the region, including the Trans-Anatolian Gas Pipeline, which started operations in 2018, and the Baku-Tbilisi-Kars railway line, which has been functional since 2017. Furthermore, because Turkey interpreted the countries' common tragic past in different ways, Armenia first postponed ratification of the protocols, and then the Armenian National Security Council officially annulled them (Görgülü 2012, 283-284; Babayev and Spanger 2020, 293). For years, a terrible historical legacy, decades of animosity, and divergent perspectives on crucial regional problems have impeded Turkish-Armenian relations (Janković and Lazić 2021, 355).

Following its defeat in the First Nagorno-Karabakh War, Azerbaijan has devoted its entire foreign policy agenda to the issue, investing billions of dollars in military forces and improving its military capabilities (Souleimanov and Evoyan 2012, 8). Military cooperation between Turkey and Azerbaijan began with the signing of a

military cooperation agreement in 1992, but with the decision to sign the Agreement on Strategic Partnership and Mutual Support in 2010, it developed into a form of defence pact, offering mutual support in the event of a third-party attack. Thus, according to this agreement between Turkey and Azerbaijan, the parties, as neighbouring and fraternal states, will closely cooperate in ensuring and protecting mutual independence, sovereignty, territorial integrity, and border inviolability. This pact lays the legal groundwork for future military and military-technical cooperation. If one of the parties is subjected to an armed assault or military aggression by a third state or group of nations, it mandates that all relevant measures, including the use of military force, will be taken. The parties will make all necessary efforts to establish military infrastructure, complete armed forces training, and transfer key weaponry and military equipment according to the agreement (Resmi Gazete 2011). As a result of the deal, Turkey and Azerbaijan became free to strengthen their military relations. In recent years, the frequency of joint military exercises between the two countries has grown, with drills taking place in Azerbaijan's interior and the Nakhichevan exclave (Branch 2018, 54).

## **Changes and continuity in the Turkish foreign policy**

Turkey's role in the second Nagorno-Karabakh conflict is part of a larger picture of Turkey's regional foreign and security policy. As a result, before assessing Turkey's policy, activities, and interests in this conflict, it is necessary to consider the continuity and changes in its overall foreign policy.

Turkey's foreign policy has shifted dramatically in the last decade, from the belief that good neighbourly relations are essential, i.e., the doctrine of "zero problems with neighbours," to numerous tensions, open disagreements, and conflicts with neighbours. As a result, it appears that Turkey is rejecting its previous foreign policy approach and is attempting to expand its regional sphere of influence by altering the status quo. The questions are: what has caused such shifts, how did they occur, and why is Turkey's foreign policy the way it is? Is it related to a shift in global security risks or the rise of Turkey's regional power, or is it, above all, a result of the internal political situation or Erdogan's policy? Is it related to Ankara's perceived national interests, and if so, what are they?

Changes in foreign policy are always the result of changes in the domestic political situation and international relations in general. In the case of Turkey, its more assertive foreign policy is caused not only by security risks such as the Arab Spring, Syria, Iran, and the Middle East power vacuum caused by the United States' withdrawal from

numerous international obligations, but also by efforts to divert domestic attention from the unenviable political and economic situation in the country (Keyman and Gumuscu 2014, 72). Also, Turkey's foreign policy has always been shaped by other factors, of which the geostrategic position is certainly one of the key ones. Some argue that due to its location at the crossroads of Europe, the Caucasus, the Middle East, and Central Asia, Turkey cannot afford to be isolated from international relations (Altunışık and Tür 2004, 88). Aside from that, Turkey's imperial past, i.e., its status as the Ottoman Empire's successor, has always influenced its foreign policy. The historical legacy includes memories of glory, which serve as the foundation for the belief that Turkey can reclaim its place as a global power, but it also includes memories of imperial defeat in World War I. Also, various historical events that occurred during and after World War I, as well as various interpretations of those events, including Turkey's denial of the Armenian genocide in 1915, are at the root of Turkey's deeply strained relations with Armenia (Vali 1971, 4-28; Haugom 2019, 208-209).

The issue of Turkey's national security has always been associated with the country's unique geostrategic position, which is inextricably linked to the interests of the great powers (*Ibidem*). Turkey adopted an isolationist foreign policy since the fall of the Ottoman Empire until 1952 when it became a member of the transatlantic community. Due to its critical geostrategic position, Turkey was an important NATO border country during the Cold War, playing a role in containing the Soviet Union. Its foreign policy was essentially passive and defensive, with a strong pro-Western stance at its foundation. Despite its vulnerability to Soviet expansionism and regional instability, Turkey has attempted to maintain the status quo by focusing its policy on the republic's national independence and secular orientation (Arda 2015, 222).

The conclusion of the Cold War brought about considerable changes in Turkey's security environment, affecting both its internal and international political situation. In this new environment, Turkey has concentrated on prospects for trade, investment, and regional cooperation in order to increase its economic and political strength in the region. Turkey's foreign policy involvement has grown significantly since the AKP took office in 2002, with the country first aiming to establish regional leadership using "soft power" tools. In his book, then-government adviser Ahmet Davutoglu, who was named foreign minister in 2009, outlined the groundwork for Turkey's new foreign strategy. The book outlines and discusses the notion of Turkish national interests' "strategic depth." It is proposed that Turkey should take on a new international role as a key factor and guarantor of regional stability, guided by concepts such as "zero problems with neighbours." It reminds us of Turkey's unique geographical location and historical factors that allow it to be active in different regions at the same time. As a result, Davutoglu advocated a foreign policy that

would enable Turkey to become a regional leader by strengthening ties with its southern and eastern neighbours. This was based on the belief that Turkey, as a key country, possessed the ability and responsibility to actively participate in the region's diplomatic, political, and economic affairs (Haugom 2019, 208-209). Also, this strategy was supposed to contribute to the improvement of Turkey's relations with the countries that were in the area of the former Ottoman Empire. As a result, at the time, Turkey sought to play an active role in the region's stability, interdependence, and prosperity, prioritising dialogue as the best way to resolve disputes while strengthening economic and political cooperation (Keyman and Gumuscu 2014, 78). However, this new foreign policy approach, as well as efforts to restore and deepen relations with the Islamic world, has resulted in deteriorating relations with Israel and a series of disagreements with the US (Đurković 2013, 128).

The challenges of the Arab Spring, particularly the instability in Syria, have called into question the viability of Davutoglu's doctrine of "strategic depth," which aimed, among other things, to create "zero problems" with neighbours, one of whose basic principles is that foreign policy goals can be achieved only in a peaceful and stable environment (Aras 2014). Furthermore, the South Caucasus area has reaped no benefits from this doctrine, since Turkey and Armenia have been unable to achieve an agreement on a number of vital issues. This is seen to be the result of strong ethnic ties between Turkey and Azerbaijan, which exerted internal pressure on Ankara, as well as Baku's pressure, which demanded unequivocal assistance from Ankara in the conflict with Yerevan (Oskanian 2011). With the Arab uprisings, Turkey's foreign policy has grown more active, viewing the dramatic upheavals as a chance to strengthen its regional and international position (Kutlay and Öniş 2021, 3055). At the same time, Turkey's military cooperation with some of the region's countries has grown dramatically, including not only military equipment assistance, but also various training programs and military coordination (Sözen 2010).

In terms of domestic policy, a serious crisis occurred in May 2013, when the AKP government used violence to quell peaceful protests by the democratic opposition in response to the government's decision to rebuild Istanbul's Gezi Park. After being elected president in 2014, Erdogan began strengthening his internal political position and control over political life in the country, particularly after the June 7, 2015 elections, which indicated a growing democratic atmosphere in the country (Yılmaz and Turner 2019, 694). Turkey announced a state of emergency in July 2016 after a failed coup attempt, with the Fethullah Gulen movement recognized as the main organiser.<sup>2</sup> After Gulen was declared an enemy of the state,

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<sup>2</sup> It's worth noting that the state of emergency was extended seven times before being lifted in July 2018.

the Turkish authorities' fears and distrust of domestic political opponents, as well as the fight against the coup, became the main features of the country's domestic policy. This prompted a constitutional referendum in 2017, which replaced parliamentary democracy with an executive presidency. This presidential system has given Erdogan broad executive powers, including control of parliament and the courts, as well as the authority to conduct foreign policy (Yilmaz 2020, 268-277). As a result, the process of nearly complete centralization of all important decisions was formalised. The AKP's coalition with the ultra-right nationalist party (the Nationalist Movement Party) to establish an executive presidency paved the way for the formation of a more pronounced nationalist government (Kesgin 2019, 8). All of these changes in domestic policy were mirrored by changes in Turkish foreign policy. All of these internal political changes coincided with changes in Turkey's foreign policy (Kuşku-Sönmez 2018).

The coup attempt has severely strained Turkey's relations with the West, and Erdogan, openly dissatisfied with the West's attitude toward Turkey and him personally, used this as an opportunity to consider radical tactical moves in regional and foreign policy. In addition, Turkey has formed several bilateral and multilateral fronts in a short period of time, on the one hand, and opened itself to the influence of non-traditional partners, particularly Russia and China, on the other. In such circumstances, foreign policy fell under the dominance of Erdogan's populist pragmatism (Kesgin 2019, 8).

In light of these developments, Turkey's foreign policy has shifted significantly, with a greater emphasis on national security challenges and national interests, to which it has responded with assertive regional policies and open aspirations for greater strategic autonomy in transatlantic relations (Haugom 2019, 210). So, fundamental changes have occurred, resulting in the rise of unilateralism, which culminated in the militarization of foreign policy, as evidenced by increased military engagement abroad, allowing it to conduct military operations in Syria, Iraq, and Libya, as well as open military bases in Qatar and Somalia. This, together with tactical collaboration with Russia and China in the areas of security, energy, and infrastructure, should have made possible Turkey's emergence as a globally respected power (Kutlay and Öniş 2021, 3054; Mehmetcik and Çelik 2021, 26). From this perspective, Turkey's support for the second armed conflict in Nagorno-Karabakh is entirely consistent with the country's recent shift in foreign policy, which is mostly attributable to domestic political and economic challenges.



## **Turkey's role and aspirations in the second Nagorno-Karabakh conflict**

The rise in military tensions between Azerbaijan and Armenia, which peaked in July 2020 in border clashes, has increased Turkish weapons exports and military cooperation between Ankara and Baku. Turkey has also said that it intends to accelerate the delivery of combat drones. Azerbaijan is estimated to have spent more than 120 million dollars in the first nine months of 2020 on defence equipment and planes from Turkey, including drones, rocket launchers, ammunition, and other armaments (Toksabay 2020). Also, in the middle of these significantly tense relations, Turkey and Azerbaijan conducted a two-week military training exercise involving both ground and air forces. The exercises' official goal was to evaluate their capabilities to respond, their readiness to undertake military operations and to define matters of military headquarters cooperation (Huseynov 2020a). The 2020 military exercises were unusual not only because they were the largest, but also because Turkey shared experience with Azerbaijan in the deployment of multi-launch missile systems (MLRS), air defence systems, and the Turkish-made attacking drone Bayraktar TB2 (Huseynov 2020b).

After a difficult year marked by numerous military armed incidents, exacerbated by decades of inefficiency in the peace process and fuelled by economic difficulties and growing nationalism, both inside the country and from Turkey, Azerbaijan launched an offensive on Nagorno-Karabakh on September 27, 2020. Although the conflict was brief, it was strong and significant in that it called into question Nagorno-Karabakh's territorial authority. The defeat of Armenia significantly shifted not only the local but also the wider regional situation in favour of Azerbaijan and Turkey (Jović-Lazić 2021, 218).

When armed conflicts erupted, Erdogan said that Turkey would continue to stand by Azerbaijan with all its resources and heart (Reuters 2020). Due to the statement of the Turkish president, as well as the increase in military cooperation, delivery of weapons, and drones in the months before the continuation of the conflict in Nagorno-Karabakh, it is believed that Turkey and Azerbaijan planned war together. There are opinions that Turkey's support for this conflict was aimed at diverting attention from open internal issues, thus creating a certain populist benefit for the country's ruling political establishment (Kutlay and Öniş 2021, 3059). In this context, Turkey is thought to have heavily influenced Azerbaijan to take more decisive action "in the territories occupied by Armenia."

As a direct consequence of the purchase of advanced weapon systems, the Azerbaijani military forces' capacity has improved significantly. Azerbaijan's military

arsenal included a high number of drones, which greatly benefited the country's success. Drones and other modern military equipment received from Turkey were extensively utilised throughout the battle to find, target, and assault Armenian defensive positions and armoured formations, helping Azerbaijan to swiftly seize, establish superiority, and overpower Armenian troops. Also, the military and logistical support and assistance of Turkish experts were important for the successful deployment of drones, intelligence gathering, and precise artillery attacks that were key to Azerbaijan's victory. Azerbaijani troops damaged Armenian air defences at the start of the conflict before using drones to target Armenian armoured and infantry units on the front lines (Welt and Bowen 2021). Aside from the fact that the tactics used were very similar to those employed by the Turkish army in Syria, Syrian mercenaries were also involved in the conflict (Il'inyh and Romanyuha 2021, 106; Clark and Yazici 2020). The operation, which was supported by Turkey and made considerable use of drones and technology, had an influence not only on the military losses of Armenian troops, but also on their general morale. The fact that about 6,700 people were killed in the fight, including soldiers and civilians, underlines the intensity of the conflict. (Davis 2021). Azerbaijan reclaimed much of the territory lost in the previous conflict, while its forces advanced deep into the breakaway region and conquered Sushu, the region's second-largest and most strategically important city. Following the loss of Shushu in early November 2020, it appeared that Azerbaijani troops would capture Stepanakert in hours rather than days, putting pressure on Armenia to accept a cease-fire agreement. (Jović-Lazić 2021, 213, 218).

The direct military support for Azerbaijan provided by Turkey and Syrian mercenaries threatened to endanger Russia's vital role in resolving post-Soviet territorial disputes. Despite Turkey's rising influence, thanks to Moscow's diplomacy, a cease-fire between Armenia and Azerbaijan was reached on November 9, 2020, and all hostilities were halted, with both sides' forces staying in their positions. In some ways, this allowed Russia to keep a vital position in the continuing Armenian-Azerbaijani conflict resolution process (Avetikyan 2020, 185). There have also been claims that an unsaid agreement was built on Russia's implicit consent to allow Turkey a stronger role in shaping the dynamics of the unresolved Nagorno-Karabakh conflict, after which Ankara accepted to let Moscow act as a mediator in the conflict settlement (Valiyev and Gafarova, 2020). Some argue that Russia tried to remain neutral during the Second War in Nagorno-Karabakh, hesitant to take the political risk of publicly supporting Armenia because its Velvet revolution in 2018 initiated a political shift in the country, affecting both its foreign policy and relations with Moscow. In addition to the loss of Moscow's trust in Yerevan, Russia's narratively neutral stance during the outbreak of the Second War

in Nagorno-Karabakh was influenced by the improvement of relations between Moscow and Baku, which was primarily the result of increased Russian weapon exports to Azerbaijan (Jović-Lazić 2021, 222-225).

In any case, the ceasefire between Armenia and Azerbaijan was mediated by Russia. A deal was made to deploy Russian peacekeepers in Nagorno-Karabakh to monitor the ceasefire along the line of contact and the Lachin corridor, which connects the region to Armenia. The mandate of these peacekeepers will be automatically extended after five years unless one of the countries notifies the other, at least six months before the anticipated expiration date, that it wishes to opt-out of this provision's implementation. The parties also agreed to build additional transport links between the western regions of Azerbaijan and the Nakhichevan Autonomous Republic (NK 2020).

Turkey got involved in the second conflict in Nagorno-Karabakh indirectly, primarily trying to undermine the status quo in the region, as well as to provide a place at the table where negotiations on the conflict between Armenia and Azerbaijan would take place (Isachenko 2020). Since the beginning of the negotiations, Turkey has demonstrated its preparedness and desire to participate in monitoring the agreement's implementation. Thus, Russia and Turkey signed a memorandum laying the basis for establishing a joint ceasefire monitoring centre the day after a tripartite armistice deal was achieved. In January 2021, the centre opened in Azerbaijan's Agdam district. It was decided that the centre would be in charge of providing and analysing information on compliance with the ceasefire regime in Nagorno-Karabakh. This information is gathered through unmanned aerial vehicles and other control sources (Sputnik 2021).

Even though the Armistice Agreement was signed with the most direct involvement of Russia, whose peacekeeping forces are the agreement's main guarantor, the renewed conflict provided Ankara with an opportunity to expand its regional power (Il'inyh and Romanyuha 2021, 101). Simultaneously, it was given the opportunity to strengthen its military-political clout in Azerbaijan, which it would most likely use to strengthen its position in regional energy projects. Also, according to the agreement, Azerbaijan and the Nakhchivan region will be connected by a land corridor, which implies that Azerbaijan will be connected to Turkey by land for the first time.

In June 2021, Turkey and Azerbaijan signed the Declaration of Partnership in Shusha, which expresses Baku's gratitude to Ankara for its support and assistance during the second war in Nagorno-Karabakh. In the Shusha Declaration, Turkey and Azerbaijan clearly reassert their commitment to the 1921 Kars Treaty. It is also mentioned that the declaration builds on previous agreements, particularly the

Strategic Partnership and Mutual Support Agreement signed in 2010 between Azerbaijan and Turkey, which stated that in the event of a military invasion or aggression on either side, both countries would provide unconditional support to the other. But the contents of the declaration go further than military help and assistance for Azerbaijan's actions in regions acquired during the last conflict. According to the declaration, the parties would increase military cooperation and continue to work together to enhance their armed forces in order to meet modern demands. The declaration also underscored Azerbaijan and Turkey's roles in the building of the critical Southern Gas Corridor, which will assist in securing energy security in the region and across Europe. The parties will continue to collaborate to strengthen the competitiveness of the East-West Transport Corridor, which passes through their respective countries. In that context, it is also very significant that the Zangezur corridor would link Nagorno-Karabakh with Turkey's eastern Kars region via a railway line that would pass through Nakhchivan. Finally, it stated that the two sides would combine their efforts in supporting collaborative regional and international actions targeted at the Turkic world's stable development (SD 2021).

During the signing of this agreement, there were growing rumours regarding the possibility of establishing a Turkish military base in Nakhichevan, which would be a significant geostrategic achievement for Turkey. Russia is keeping a close eye on events in Azerbaijan surrounding an eventual Turkish military base, which might push it to take action to preserve its very own strategic interests (Reuters 2021). Ankara has once again posed as an opponent to Moscow in the Nagorno-Karabakh conflict, as it has done in Libya and Syria. However, for the first time, Turkey was directly involved in the post-Soviet region's armed conflict, which had previously been regarded strictly as a Russian priority zone. Thus, Turkey indicated an aspiration to enhance its political and military presence in the region. Given that this tends to result in a change of regional balance at the expense of Russia, the second conflict in Nagorno-Karabakh underlined the entanglement of relations between Turkey and Russia. It is because Russia realized that Turkish-Azerbaijani military supremacy and significant changes in the status quo in Nagorno-Karabakh were irreversible, hence why Turkey was contacted throughout the peace negotiations, although it failed to become a party to the agreement (Fatih 2021, 177). For its part, Turkey has also shown its readiness to accommodate Russia's interests in this conflict. Furthermore, despite accepting Turkey's greater role in the region, Russia has prevented Turkey's power from growing significantly, as its representatives are only expected to contribute to the Joint Ceasefire Monitoring Centre's work. As a result, Turkey's ability to achieve its regional foreign policy ambitions will be dependent on Russia's interest and willingness to open the door to cooperation in monitoring agreement compliance, which would be broader than

cooperation within the centre. This can be expected if Russia estimates that it would enable it to achieve its strategic priorities on other fronts.

## Concluding remarks

The Nagorno-Karabakh conflict erupted in September 2020, demonstrating that Turkey's previous policy of relative restraint had given way to open support for Azerbaijan. This reflected the country's ongoing efforts, among other things, to increase its regional and international political clout by becoming more involved in regional conflicts. Despite the fact that Turkey's foreign policy has entered a new phase since the AKP took power, as evidenced by debates over a potential shift in the country's foreign policy orientation, significantly different foreign policy practices have taken place in recent years. Until 2010, Turkey implemented a strategy to promote dialogue between Armenia and Azerbaijan, but in 2020, Ankara became an openly pro-conflict player, aggressively helping Baku. Turkey's changed attitude towards the Second War in Nagorno-Karabakh is primarily the result of domestic policy shifts and attempts to redirect public attention away from internal political and economic difficult issues. It also reflects broader changes in Turkey's foreign policy, including the alteration of Turkey's strategic goals, as well as the rise of the military sector and the militarization of foreign policy, as a result of the pursuit of strategic autonomy (Köstem 2019, 114). Thus, Nagorno-Karabakh has become another front on which Turkey is trying to undermine the current political order, showing its ambition to become a more independent player, achieving its geopolitical goals even when they are contrary to the interests of its Western allies.

Even though Turkey's influence in Nagorno-Karabakh is constrained by complex regional ties, its importance cannot be overstated, as it has the potential to significantly influence regional power distribution and balance, as well as wider international affairs. Cornell once pointed out that Nagorno-Karabakh can in some ways be taken as a test of Turkey's ability to act as a regional power in the Caucasus and Central Asia (1998, 67). In this context, it can be concluded that Turkey's involvement in the renewed Nagorno-Karabakh conflict has strengthened its position in Azerbaijan and reshaped the geopolitics of the South Caucasus, which Russia considers its sphere of influence.

Although it has successfully maintained its role as a mediator in the region, Russia must be aware of Turkey's strong political and military presence and formulate its policy with Ankara's interests in mind. It seems that this is not so

difficult to achieve since Russia and Turkey, despite being on opposite sides in Nagorno-Karabakh, have once again shown their readiness to cooperate. This is largely attributed to Turkey's growing ambition to conduct its foreign policy independently from the West. Cooperation with Turkey is a risk that Russia is willing to accept, particularly if it means removing the US and the West from a region crucial to Russia's national interests. As a result, Turkey's ascent at the expense of Russia might have global consequences rather than just regional ones.

Finally, it is worth noting that this conflict needs special attention since, notwithstanding the cessation of hostilities, the status of Nagorno-Karabakh remains a tough unresolved question. Because of that, there is a high risk the conflict may flare up again, with far-reaching consequences, not just in the South Caucasus region but also beyond, if other regional powers become involved. Even if hostilities do not resume, the unresolved status of Nagorno-Karabakh will continue to have a negative impact on regional security. Together with Russia, Turkey can play a vital role in bringing Azerbaijan and Armenia's positions closer together and reaching an agreement.

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Ana JOVIĆ-LAZIĆ

**ULOGA TURSKE U DRUGOM JERMENSKO-AZERBEJDŽANSKOM ORUŽANOM  
SUKOBU OKO NAGORNO-KARABAHA KAO ODRAZ KONTINUITETA  
I PROMENA U NJENOJ SPOLJNOJ POLITICI**

**Apstrakt:** Članak istražuje ulogu Turske u sukobu oko Nagorno Karabaha koji je izbio između Azerbejdžana i Jermenije u septembru 2020. godine. Analizira se kako su promene i kontinuitet u spoljnoj politici Turske uticali na ishod sukoba, kao i u kojoj mери je on iskorišćen za ispunjavanje spoljnopolitičkih ciljeva Turske. Dakle, za razliku od većine istraživanja Nagorno-Karabaha, ovaj članak se fokusira na ulogu jednog spoljnog aktera, a ne na sam konflikt ili moguće hipoteze za njegovo rešavanje. Na poseban fokus članka uticala je činjenica da je učešće Turske dovelo do promene dugogodišnjeg status-a quo u Nagorno-Karabahu, što je omogućilo da se situacija dramatično preokrene u korist Bakua. Turska se, uz Rusiju, pojavila kao jedan od najvažnijih regionalnih aktera u ovom sukobu. To je rezultat naglašenih spoljnopolitičkih ambicija Turske, na koje su uticale promene u njenom međunarodnom bezbednosnom okruženju, kao i promene u unutrašnjoj politici zemlje. U svakom slučaju, Turska je svojom ulogom u drugom ratu u Nagorno Karabahu još jednom pokazala odlučnost da, uprkos tome što je članica NATO-a, svoju spoljnu, a posebno regionalnu politiku vodi samostalno i u skladu sa svojim nacionalnim interesima.

**Ključne reči:** Turska, Nagorno-Karabah, Azerbejdžan, Jermenija, Rusija.



# Rivalry between the United States of America and Russia in cyberspace

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**Abstract:** Authors analyze cyberspace, a product of the rapid development of information and communication technologies, and its role and importance for leading world powers. Nevertheless, to the undoubted advantages for modern society, cyberspace has certain negative aspects regarding the state functioning. The authors emphasize that there are certain threats in cyberspace and that they are becoming more numerous and sophisticated. In strategic and doctrinal documents of many countries they are among the greatest security challenges in the 21st century. The authors explain that cyberspace is characterized by increasing militarization and the undoubted military presence of leading world powers such as the United States (U.S.) and Russia. Further, authors develop the argument that the growing dependence and use of information and communication technologies has caused, among other things, a change in the physiognomy of modern armed conflicts. The next part of the paper is dedicated to the conflict of states in cyberspace. In the final part of the article, authors give examples of incidents between the U.S. and Russia and analyze their capability for cyber warfare. The authors conclude that both considered world powers have respectable offensive and defensive capacities for cyber warfare.

**Key words:** information, information-communication technology, contemporary conflict.

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## Introduction

The information society is characterized by a high level and speed of transmission, reception and exchange of digital data and information. The information transmitted by information and communication technology serves as a basis for making optimal decisions at all levels of society and contributes to the efficient use of resources needed to make decisions. It provides access to huge amounts and sources of information, possibility of making contacts on a global level and cost reduction. The information society is exposed to various abuses in the information environment. Cyberspace, by its characteristics, provides favorable conditions for criminal behavior of individuals or groups, often sponsored by certain states.

Human civilization is characterized by numerous conflicts, armed and unarmed, which were conducted in accordance with technological and other achievements in those periods. Throughout the course of history, military leaders have considered information superiority a key factor in victory. The struggle to achieve "information superiority" is increasingly emphasized in information society.

The interconnectedness, interdependence and availability of information and communication technologies, such as computer networks, are constantly redefining and changing the characteristics of modern conflicts. Cyber space as unlimited and interactive environment represents a link between different networked entities (individuals, organizations, etc.). The world's leading powers view cyberspace as a new, fifth, area of warfare (along with land, sea and ocean, air and space) (Vuletić 2021, 2).

Cyberspace, with all its advantages and disadvantages, has conditioned an increasing military presence in that domain. Cyberspace is a globally integrated information and communication infrastructures organizations but also vital state structures (banking sector, health care, transport, water, energy, etc.). Although it is predominantly a virtual domain, cyberspace has a significant physical dimension - computers that process and store data, systems and infrastructure that enable the communication and exchange of data and information. This physical dimension indicates that cyberspace is not completely without national sovereignty (Willett 2019, 1; Stojanović 2021, 440-441).

Cyberspace is a global domain within the information environment that consists of an interdependent network of information and communication technologies and appropriate information content (data and information). Cyberspace is a complex, changeable, difficult to predict, insecure and unstable environment that has its own physical dimension (eg computer servers). Although cyberspace provides communication opportunities, it also creates critical vulnerabilities that

an adversary can exploit. Complexity, low cost of access, widely available resources, minimal required technological investments and anonymity in cyberspace allow opponents to inflict serious damage (JDMCO 2019; DoD Strategy for Operations in the IE 2019).

Superiority in cyberspace provides a decisive advantage to commanders at all levels of command (strategic, operational and tactical) in modern conflict. Superiority in cyberspace is the degree of dominance of one force in cyberspace that enables safe, reliable conduct of operations of that force and related ground, air and other forces. Superiority in cyberspace enables, supports, provides and facilitates the realization of the goals of the operation. The ability to act in cyberspace has emerged as a vital requirement of national security. The growing influence of information and communication technologies on military operations further increases the importance of cyberspace for national security (JP 3-12 2018; FM 3-12 2017).

## **Physiognomy of modern armed conflicts**

Changes in the global order of international distribution of power by moving from bipolar, through unipolar, to multipolar structure of international relations (Stojanović i Đorđević 2017, 466-470; Radaković 2012, 120-121; Kostić 2018, 407-409; Kostić 2019, 522). The strategies of the great powers are based on military power, but also on economic means, which is especially characteristic of China (Stanojević 2021, 30). Multiplication of global factors and the intricate network of interactions between the elements of the system causes constant tensions in today's world (Prošić 2015, 13). Transformative effects of globalization and technical-technological development have conditioned the classic use of military power stopped being dominant factor in contemporary conflicts. From the earliest history of human civilization and the formation of the first states until today, military power has determined the fate of civilizations, peoples and states and significantly influenced the harmonization of defense policy and systems, and thus created international relations.

The current moment in the international community is characterized by the growing role of non-state actors (NGOs, religious movements, multinational corporations, etc.) and the frequent disruption of relations between different states, which has numerous negative implications. States use various instruments to conduct foreign policy, such as bilateral and multilateral negotiations, international law, the formation of military, economic or political alliances, acting

through international organizations, starting wars and relying on military force (Proroković 2017, 402-403).

Historically, the rules of international peace and security have been always depended on the system and relations of the international structure among the great powers. The decline of the American the power and rise of other great powers, especially China and Russia, once raises again the question of the direction in which international peace is heading and security order go on (Trapara 2010, 93).

The globalization of political, cultural, information-communication and, especially, economic ties of the subjects of international relations, have resulted in the growing importance of the role of other, non-military forms of power. Globalized international relations continue to be shaped by *realpolitik* practice. In such conditions of social reality, military power has lost its significance, but it still occupies an important role in world politics.

Beginning in the second half of the twentieth century, modern society is characterized by certain controversies which indicated the so-called "dark side of progress." Numerous technological achievements have led to the numerous threats to both individuals and countries (Aleksić 1995, 16-20).

Technological progress and the development of the information society have conditioned the change and physiognomy of modern armed conflicts. The progress of development in all segments of society has imposed the need for a different strategic thinking on how and by what means to achieve and protect vital national values and interests. The presence of non-state actors, the absence of rules and organized units in the struggle are a feature of the conflict at the beginning of the 21st century, fundamentally different from the previous ones guided by the principles formulated by Karl von Clausewitz (Kaldor 2012, 1-14). John Mueller (1996, 221), pointed to a change in the nature of contemporary conflict. He further indicates that the conflict of power in the so-called Great War became almost inconceivable. According to him, there is little chance that armed conflict will be used as a method of politics to achieve certain goals, such as conquering territory, moving borders or establishing supremacy in international relations, has been overcome. The author sees the main reason for these claims in the changed psychology of statesmen and peoples, as well as in general absence of aggression in developed countries to start a war.

The processes of globalization and technical-technological development have resulted in the reduction of the role of military power in modern international relations, which affects the physiognomy of modern armed conflicts, more precisely its character. The transformation of armed conflicts into postmodern ones conducted at the highest level, through a different, less important role of the



military instrument of power, in relation to other non-military instruments of power (economic, informational, political), in achieving ultimate strategic goals. Numerous and diverse social relationships create an environment where asymmetric challenges, risks and threats are becoming the dominant forms of security threats.

The military power of states, expressed by engagement of armed force, is increasingly proving ineffective in pursuing foreign policy interests. The current conflict in Ukraine may refute such claims. The trend of decreasing its efficiency can be explained by the impact of the process of globalization and the information revolution on social flows. Globalization has led to the growing role of non-state actors in international politics, thus transforming international relations into global ones. In addition, the information revolution has led to the development of new areas in which unarmed international conflicts take place (Vuletić i Vračar 2018, 137).

The institutionalization of diplomacy in the new conditions and the construction of a modern security system influenced the limitation of the engagement of the military resources in the realization of the set goals by states as subjects of international relations. A new way of resolving disputes has also caused the development of new means, and with them new ways of warfare (information, hybrid, etc.). Thanks to the efficiency of implementation, these new ways of warfare are a characteristic of modern conflicts and ways of resolving disputes in the international community.

Today's multipolar world sees the changing role of international organizations, the changing role of states, the delegation of competencies to the institutions of the union (for example, member states of the European Union), different interests which consequently lead to various conflicts adapted to the achieved level of technological and social development (Mikić 2002, 113).

Modern conflicts differ in nature and in their impact on other social phenomena. The essence of each individual conflict expresses the characteristics that represent a series of events and activities related to technological progress, military capabilities, economic development, and so on, of conflicting states. Due to the continuous development of human society, science, weapons and military equipment, there is a constant development and diversity of conflict characteristics. Thus, the above mentioned conflict characteristics cannot be viewed as a universal category, but as a variable category that depends on a different factor.

Contemporary conflicts are multidimensional (economic, diplomatic, informational ...), complex and continuous. The focus, in the contemporary conflict, is shifting from armed to unarmed content, which leads to changes in the order of phenomena and processes that take place in it. Armed violence, as the dominant content, is pushed to the end (it becomes the ultimate method of the conflict

itself). Time is of the essence in an armed conflict. The conflicting parties are trying to achieve their goals as soon as possible, and modern weapons and combat equipment significantly contribute to that.

Conflicts often lead the world's most powerful states far from their home territories, thus protecting their vital (mostly economic) interests. A typical example of this kind is the Gulf War, led by several major world powers against oil-rich Iraq. Contemporary conflicts differ in certain elements such as: the space in which they are conducted, the intensity and duration of actions, and so on. In the modern conflict, the importance of electronic and anti-electronic actions has increased. Domination in the information environment is very important as well as domination, i.e. control of the situation in space, airspace and on land. (Stišović i Sivaček 1998, 12).

Various modern weapons are widely used in modern conflicts and there is a growing asymmetry between the conflicting parties. Each side in the conflict strives to preserve and spend as little of its resources as possible, above all, people, are the least exploited. Saving one resource category in conflict leads to increased consumption by others. What is accepted as the norm of shaping the modern conflict is the maximum engagement of people, rational spending of war equipment and energy, all at the expense of using an extremely large amount of information. In all conflicts there is a great need for information and the amount of relevant information available is of great importance for final outcome of the conflict.

Modern armed conflict is inconceivable without a large amount of information about the enemy, one's own forces, the environment in which it is conducted. Information provides numerous advantages to the information superior side in the conflict. At the same time, information has also become an important target for opponents. Information is becoming increasingly important for national security in general and in armed conflict in particular. Accordingly, contemporary conflicts are strongly characterized as a battle in the sphere of information. Information management has become an important weapon in changing the attitudes of opponents and imposing one's own will.

## **State conflict in cyberspace**

Necessary condition for a certain state to have the status of a superpower in the twenty-first century, it must have respectable capabilities for cyber warfare. Besides to using cyberspace to seize various types of classified information, like

traditional espionage, states use cyberspace to initiate their own economic development: disruption of financial institutions, interference in electoral processes, obstruction and diminishing the capacity of another state to develop nuclear weapons, etc. (Willett 2019, 1).

State-sponsored cyber operations are happening more often, and the consequences for the target can be more serious. Some cyber operations have been revealed in the media, while most remain in the domain of the most closely guarded secrets. Cyber operations can cause the death and destruction of people and property, intentionally or accidentally. In certain cases, the uncontrolled action of a computer virus can occur, as has happened with e.g. the British national health system which was probably the unintentional victim of a North Korean cyber attack targeting the UK banking system (Willett 2019, 1).

Threats in cyberspace are real, fast-growing and changeable. The most significant threats in cyberspace come from national actors. Nation-states are not the only threat actors. Numerous growing threats in cyberspace include cybercriminals, individuals or groups that may be politically motivated, mercenaries capable of using existing or acquiring new tools for malicious activities, i.e. for the realization of desired goals. Cyber attacks will be part of any future conflict, including attacks on a particular state, before or during an armed conflict. With that in mind, the critical information infrastructure of a particular country is at risk of cyber threats and must be protected (Porche III 2020, 4-20; Vuletić 2019, 55-60).

States are engaged in increasing competition in cyberspace “at a level below the armed conflict”. Cyber espionage has become a common occurrence in cyberspace, and increasingly cyber sabotage, making threats in cyberspace destabilizing and potentially escalating (Inkster 2019, 1).

The consequences of cyber attacks are growing. The malicious program NotPetya exploit from 2017, initially directed against Ukraine, paralyzed the activities of the world’s major corporations and ports, disrupted significant parts of global supply chains for several weeks (Inkster 2019, 1). The material damage caused by the cyber attack is estimated at billions of US dollars. Major problems in the Internet functioning are caused by attacks on the most important elements of the Internet infrastructure, such as Domain Name System<sup>3</sup>. The problem in the future will be bigger due to the increasing use and dependence on the “Internet

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<sup>3</sup> It is a system that converts hostnames into IP addresses, making it easier to use the Internet, because Internet communication is based on numerical IP addresses that are difficult for people to remember.

of Things”<sup>4</sup>, which includes millions of vulnerable and potentially insecure devices that connect via the Internet, which significantly increases the number of possible targets that may be endangered (Inkster 2019, 1).

Russia has often been brought into a negative context, trying to influence the outcome of the US presidential election held a few years ago. The media reported that Moscow carried out an orchestrated disinformation campaign to influence public opinion and their voting (Bina and Dragomir, 2020, 125).

There is a growing concern that the Internet, on which almost every function of human society depends, will be threatened by an increase in harmful activities and in itself become a catalyst for growing global instability. “Global Commission for the Stability of Cyberspace” was created to solve problems and create a safer virtual environment. The Commission held numerous meetings in several different countries during which cyber threats were analyzed and measures to mitigate them were considered (Inkster 2019, 1). Commission was dissolved in 2019.

Considering its origins, modern Internet management is dominated by a different approach of several stakeholders. Trust, openness and consensus are emphasized, with cyberspace considered incompatible with traditional models of control of the Internet and other computer networks. Different interests and approaches to a number of issues related to cyberspace, create favorable conditions for individuals, organizations and certain countries to go unpunished for certain malicious activities that they commit in the mentioned domain. (Willett 2019, 1).

The doctrine of information security of the Russian Federation specifies what information security is, with an emphasis on the protection of the individual and the state in the information environment. This segment of national security has been identified as one of the priorities. The Doctrine lists the negative factors that affect information security with special emphasis on foreign interference and influence. Additionally, the lack of generally accepted regulations and procedures also poses a problem. (Doctrine of Information Security RF 2016).

Russia is committed to defining generally accepted principles for regulating rules of conduct, legal norms and other important elements related to the information security. Russia has prepared and presented two resolutions at the United Nations General Assembly in September 2018. The resolution recommends

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<sup>4</sup> These are a number of networked devices, sensors, home appliances, vehicles, facilities, machines and the like that can exchange data with the operator and other connected devices. They are applied in various areas of life and work. It is estimated that the current number of such devices is tens of billions and with a tendency of constant growth.

re-establishing the United Nations (UN) Group of Governmental Experts on Cyber Security and the adoption of regulations and legal norms that would apply to cyberspace. However, due to different points of view and different interests, these resolutions were not accepted by the United States and certain countries. (IISS 2018a, 1).

At the scientific conference dedicated to cyber security held on July 6, 2018 in Moscow, Russian President Vladimir Putin invited the participants to international cooperation in order to solve problems in cyberspace. He pointed out that threats in cyberspace have reached a high level, that they can only be countered by the joint efforts of a large number of countries, and that cyber security requires multilateral communication and coordination (IISS 2018b, 1).

The international conference “Cyberstability: Approaches, Perspectives, Challenges” was held in the Russian Federation in 2018. The conference was organized by the Journal of International Affairs. Besides promoting views on Russia’s information security policy, the conference played an important role in continuing the discussion on military cyber stability between China, Russia and the U.S. The meeting, held in Paris in November 2018, included representatives of the leading European countries and was an upgrade of the meetings realized in previous years in China, Germany and the USA. The participants were suggested to go beyond theoretical exchange and work on it by organizing joint exercises that reflect realistic scenarios of conflict in cyberspace. The conference contributed to a better understanding of mutual differences and the prevention of possible conflicts in cyberspace (IISS 2018c, 1).

Russia is trying to establish a greater degree of control over the flow of information on its territory. It advocates a multilateral regulatory procedure aimed at using information and communication technologies for military, terrorist and criminal purposes. The U.S., a country with probably the greatest cyber capabilities, focuses discussions on state actions, and less on internal security and information threats. The U.S. continues to strongly oppose state regulation in the area of information flows proposed by Russia.

This strategic emphasis, in turn, influenced the way Russia organized its cyber forces (Connell and Vogler 2017, 5-6). In 2013, Russia revealed that it plans to form a unit for action in cyberspace that would have offensive and defensive capacities, research and development potentials in order to improve the level of security in cyberspace and information security in general. It is assumed that Russia, as well as other countries, has a problem with recruiting that profile of experts (Connell and Vogler 2017, 8).

Russia has been brought into context, by certain countries, for demonstrating cyber capabilities, among other things, by attacking the Ukrainian power grid. Estonia, Georgia and Ukraine have served as a testing ground for Russian cyber capabilities, providing them with opportunities to hone their techniques and procedures in cyber warfare and techniques to deter potential adversaries. The simple DDoS attacks<sup>5</sup> and DNS hijackings<sup>6</sup>, sophisticated malwares such as BlackEnergy<sup>7</sup> and Ouroboros<sup>8</sup>. In addition to the security services (Russia's military intelligence service – GRU, and the Federal Security Service – FSB), the offensive cyber activities of the Russian Federation involve individuals, various criminal organizations and associations. However, some experts believe that the techniques and tools they use are no longer as effective as they were five or ten years ago (Connell and Vogler 2017, 27-28).

It is estimated that preparations for cyber (information) attacks took a long time to prepare, which resulted in unauthorized intrusion into many critical information infrastructures in Ukraine at the beginning of the conflict. These activities indicate the prior planning and selection of the goal, compliance with the broader plan of the information operation, which is the difference from e.g. unauthorized access by a hacker group (Connell and Vogler 2017, 27-28).

Besides the adoption of normative and doctrinal documents and the formation of a special unit for cyber warfare, a special center (Cyber Defense Center) for managing cyber activities has been established, which has improved the level of security in cyberspace in Russia (Connell and Vogler 2017, 27-28).

It is very likely that Russia will use cyber operations in the pre-conflict scenario or even in peacetime when there is an opportunity that in this way they can influence the strategic outcome. The advanced level of cyber capabilities has, above all, a deterrent role, but it is to be expected that in the future it will have an increasingly offensive role to achieve strategic goals. (Connell and Vogler 2017, 27-28).

As already mentioned, responsibilities for cyber activities of the Russian Federation are primarily within the competence of the intelligence and security

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<sup>5</sup> These are attacks from thousands of computers aimed at overloading a web server, network or other part of the infrastructure and thus denying access to their users.

<sup>6</sup> DNS Hijacking is a form of intrusion that directs web traffic to unauthorized domain systems. That way, users' requests are intercepted and redirected to the attacker's compromised DNS server.

<sup>7</sup> BlackEnergy is a Trojan malware designed to launch distributed denial-of-service (DDoS) attacks, download custom spam, and banking information-stealer plugins.

<sup>8</sup> Ouroboros ransomware is a malicious cryptovirus.

structures (civil and military) of the Russian Federation. The FSB (Federal Security Service) is probably the main organization in the Russian Federation in charge of information security (Heickero 2010, 4).

Cyber weapons are unnecessary if physical control of information infrastructures is provided, as shown in the case of the occupation of Crimea. Occupying an Internet access point (Simferopol Internet Exchange Point) and disconnecting cable connections to the mainland, have contributed to the overall information dominance in Crimea, greatly facilitating the operation (Giles 2016, 49).

An extremely important aspect of Russian information activities are the activities of trolls, personnel managed by individuals and bots managed by automated processes. Paid trolls are joined by “seduced” individuals in target countries that support certain activities for a large number of different, often personal reasons, discussion group members, or Twitter users. (Giles 2016, 54-56).

Russian concepts of operations are constantly evolving, and future campaigns will not resemble those seen so far. Engagement and replacing numerous staff and their operational deployment on the Ukrainian border and in Syria reflects, among other things, the intensive conduct of various forms of information warfare. The American assessment is that eastern Ukraine represents “a newly created laboratory for the future warfare.” Russia and the citizens of Ukraine who support them have taken advantage of access to highly sophisticated electronic attack technologies, including GPS<sup>9</sup> spoofing, which has compromised positioning and guidance systems. Numerous operations from the recent past show that modern conflict is a mix of different diplomatic, informational and other non-military means, carried out with the support of military force” (Giles 2016, 64).

Individuals or organizations have compromised or hijack users accounts on social networks in the interest of Russia. Another campaign that Russia seems to have developed, is the capacity of mass targeting individuals on a personalized basis. Cyber attacks on Ukrainian energy networks in December 2015, were followed by an action of mass prevention of energy consumers from contacting service providers. The incident was likely denial of service (DoS) attack on the target server (Giles 2016, 72).

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<sup>9</sup> A satellite system for accurately determining the geographical position anywhere on Earth, with an error radius of several meters. There are more than 30 satellites in the system for positioning, and in order to determine the precise connection of a device or object, it is necessary to establish a stable connection with a minimum of 4 satellites.

Military operations against Ukraine in 2014 and 2015 were accompanied by various information operations, which affected the morale, mobilization and response of Ukrainian forces. (Molder and Sazonov 2018, 327).

Computer viruses and other malicious software are important for compromising enemy computer systems, stealing information and intelligence, and developing and testing one's own cyber warfare weapons. Attacks range from high-level approaches, including targeting information and communication infrastructure at the strategic level, to much more focused targeting of individuals on a personal basis. Russia has also used the available resources to take over existing accounts on social networks in order to spread misinformation. Targeted SMS messages, emails or posts on social networks had a great effect on people who participated in the protest against Russia (Giles 2015, 5-14).

Russia's consideration of various forms of information warfare includes the perception of cyberspace as an important domain. Information is the most important element of the operation. The desired goal is complete domination in the information spectrum. In short, in Russia's comprehensive approach to information, cyber is not an independent discipline. According to Major General Stephen Fogarty, Commander of the US Cyber Command, Russian activities in Ukraine represent an effective integration of various forms of information warfare (electronic, cyber, psychological ...) in order to achieve the desired goal (Giles 2015, 13).

In the American understanding of cyberspace operations, they are based on the goal of achieving goals in or through cyberspace. (DOD Dictionary of Military and Associated Terms, 2018). The doctrine of the Ministry of Defense of the United Kingdom defines operations in cyberspace as "Planning and synchronization of activities in and through cyberspace in order to enable freedom of maneuver and achieve military goals" (Porche III 2020, 18).

The concept of strategic deterrence by the USA in cyberspace has not proven to be effective enough in practice. The American attitude towards cyberspace was more defensive in nature and aimed primarily at deterring potential attackers. The United States calculated that the perception of his offensive abilities could deter opponents from attacking (SGI 2019, 1).

The American approach to cyberspace has evolved in line with technological change. The establishing of the U.S. Cyber Command (USCYBERCOM) in 2009 and the achievement of the status of an independent operational command in May 2018 (until then it was part of the Strategic Command), shows the importance of cyberspace for the Pentagon (SGI 2019, 1).



In many ways, the separation of the American cyber command from the Strategic Command, which oversees strategic deterrence, is a symbol of the change in American attitude in cyberspace from defense to what has been described as “persistent engagement.” In its vision for 2018, the Cyber Command states its goal that the U.S. must defend itself in advance, and as close as possible to the source of hostile activities and actors before they can achieve tactical, operational and strategic advantages. This belief is reinforced in the National Cyberspace Strategy published in September 2018 (SGI 2018, 1). The operationalization of the mentioned strategy through doctrinal and other documents would create conditions for effective action against certain entities, marked as hostile (for example Iran, due to the downing of the American drone) in cyberspace. The cyber attack on Iran has been publicly acknowledged by certain United States officials (SGI 2019, 2-5).

Cyber deterrence has not been successful in practice. That’s why the interference and harassment, as opposed to deterrence, has been shown to be a more efficient and optimal model of action in cyberspace. American opponents know that in the event of a cyber attack on U.S., this would lead to a fierce response and serious consequences for the attackers. Therefore, they engage various groups, organizations or movements in order to realize their goals against the U.S. and its allies (SGI 2019, 3).

The U.S. emphasized the right to take action and to self-defense in the event of a cyber attack (Office of the Coordinator for Cyber Issues 2018, 1-3). In May 2019, the former President of the U.S., Donald Trump, declared the state of emergency in cyberspace at the national level, citing threats to the country’s critical infrastructure. It was the third such declaration by the American president in four years (IISS 2020a, 1).

The U.S. carry out cyber operations at the strategic, operational and tactical levels. For almost three decades, they have been developing strategies and plans for cyberspace. The U.S Cyber Command has thousands of members who can be engaged in various types of cyber attacks both nationally and globally. The United States’ advantage over other world and regional powers in terms of cyber capabilities has diminished in recent years (IISS 2020b, 1).

Protection of national interests, achieving domination and superiority in cyberspace are the main goals stated in the U.S. National Strategy for Cyberspace (National Cyber Strategy of the USA 2018).

US infrastructure is the most common target of numerous attackers, often sponsored by certain states. Their findings reportedly include data on the involvement of about 20 countries, most of which participated in the United

Nations Group of Governmental Experts (GGE) discussions (Tikk 2019, 479). The complicated procedure of initiating cyber attacks and the problem of inter-ministerial coordination was solved by passing the PPD-20 order in August 2018. (SGI 2019, 5).

Despite differing views, both Russia and the U.S. were pleased with the outcome of the 2014-2015 UN Group of Governmental Experts meeting, especially by the recommendation of 11 norms of responsible behavior of states (UNGA Rep. A / 70/174). At the meeting of the working group of government experts, it was said that such norms, rules and principles are voluntary, not binding. The report can also be interpreted as saying that Russia and certain countries are right when they try to overcome ambiguities and controversial elements in international law regarding cyberspace.

The U.S. has also developed offensive capabilities in cyberspace in the past, but this development has been far more intense in the last ten- fifteen years. According to some sources (NCERT 2012, 6) the U.S. is linked to involvement in the 2010 malicious program Stuxnet, which degraded Iran's nuclear weapons development program. Ways of using cyber weapons to sabotage North Korea's ballistic missile program were also investigated. Confidential information like this is difficult to verify, and there are often strategic reasons why it is not disclosed (SGI 2019, 1).

In January 2019, France announced the strategy which, instead of "active defense", emphasizes offensive cyber operations. It was also declared that the budget will be increased and that the forces for cyber warfare will be expanded. In 2013, the United Kingdom became the first Western country to announce the development of offensive cyber weapons, and in 2018, it planned to form new cyber forces, numbering about 2,000 staff, which could face a threat from Russia. NATO has announced that it will not independently conduct offensive cyber operations. Instead, it will integrate them and coordinate activities with member states. (SGI 2019, 5).

### **Examples of incidents between the U.S. and Russia in cyberspace**

According to reports from certain cyber security companies, between the two rounds of presidential elections in France, Russian hackers allegedly interfered in Emanuel Macron's election campaign. Macron, one of two candidates voted in the second round of the presidential election, accused Russia of discrediting his

campaign, and his staff complained about constant, sophisticated cyber-attack attempts (SGI 2017, 1).

Russia is suspected by some countries of the international community of carrying out a series of attacks testing the defense of critical infrastructure of the U.S. (SGI 2019, 1). Certain TV stations, such as NBC, reported that the former U.S. president, Donald Trump, personally approved the cyber attack of the US military on the Russian “Internet Research Agency” during the parliamentary elections in Russia, in 2018.

In mid-April 2017, a letter from IT expert Ruslan Stoyanov was published in certain Russian media. Stojanov claimed that Russia was recruiting hackers for numerous cyber campaigns, offering them immunity from criminal prosecution for crimes committed abroad. Earlier, an indictment was filed against four people who are allegedly agents of the Russian Federal Security Service (SGI 2017, 1).

Regardless of the risks and possible consequences, individuals and organizations motivated by different things, engage to achieve someone’s goals. States strive to gain supremacy in cyberspace and to recruit the best, highest paid, experts. Peter Levashov, a Russian citizen, arrested on the orders of the U.S. in Spain in 2017, allegedly paid dearly for his services. He was allegedly not paid a large amount of money, but other people, such as Levashov, are being offered other rewards. Most countries with advanced intelligence capabilities hire operatives under unofficial cover. This way of engaging is realized in order to protect one’s own image. Russia is not alone in recruiting its citizens, who live abroad, to perform certain tasks for their needs (SGI 2017, 1).

Due to the alleged connection of Kaspersky with the Russian government, the U.S. Department of Homeland Security has demanded that federal agencies remove all Kaspersky products from their computer systems. They justified their demands by arguing that Kaspersky’s products, like those of several other companies, were designed to provide complete recording and supervision of all traffic on computer networks (IISS 2017, 1).

Microsoft has released information about a new cyber offensive, which they said was carried out by Russian government hackers. Russia’s APT28 group, considered part of Russia’s military intelligence service (GRU), has created fake websites to attract visitors and ask them to leave personal information. Microsoft points out that the perpetrators’ intention is to collect certain information from clients (IISS 2018d, 1).

There are reasonable suspicions that individuals, organizations and movements, sponsored by Russia, are invading American critical infrastructures.

Probable goal of the attacker was to create remote access capabilities and disruption of the conflict management system (Connell and Vogler 2017, 27-28).

After the United Kingdom, the Netherlands and the U.S. published news about malicious Russian cyber operations. Certain Latvian officials said that Russia's military intelligence service, the GRU, had been attacking their central intelligence agency for years (IISS 2018e, 1). Certain allegations have been made against the Russian state over the alleged attack on the Organization for the Prohibition of Chemical Weapons. The incident allegedly happened in April 2018, after which four Russian intelligence officers were expelled. The Dutch government also stated that Russian hackers tried to infiltrate and obstruct the investigation into the crash of the Malaysia Airlines MH17 plane (IISS 2018f, 1).

The US Department of Justice has filed an indictment against seven Russian military intelligence officers on charges of unauthorized access to computer systems, fraud, identity theft and money laundering. The indictment alleges that certain individuals intended to compromise international anti-doping efforts in revenge for publishing a state-funded Russian doping program (IISS 2018f, 1).

## **Cyber warfare capabilities of the U.S. and Russia**

The importance of cyberspace and the use of information resources are critical to the outcome of modern armed conflict. Dominance in cyberspace and protection of own resources is the goal of both countries, which can be seen in the analysis of their strategic and doctrinal documents. In the U.S. strategic documents, cyber operations are viewed as separate operations, while the Russian side views them as a component of a broader, information war. Both countries have formed units, respectable capacities and capabilities for cyber warfare. Significant attention is paid to the protection of information resources in both countries. The analysis of the documents shows the emphasis on the greater threat to the United States from Russia (and China) than vice versa. The degree of dependence on information and communication technologies is higher in the U.S. than in Russia, which represents a higher risk and possible consequences in case of compromising these systems. Russia is increasingly relying on the development of its own industry and sophisticated tools. As in China, the perceived abuse of social media in Russia is considered a significant issue of national security. Both countries are aware of the numerous threats to their information and communication infrastructure (IISS 2021, 15-28, 103-114).

A possible cyber war is currently a disadvantage for the U.S., according to cyber security experts. Measuring capabilities, in addition to the offensive aspect, includes defense (a measure of national capacity to block or mitigate the consequences of an attack) and dependence (reliance on computer networks and systems that may be vulnerable to cyber attacks). The measurement of cyber warfare capabilities, according to Richard Clarke and Robert Knake, is based on the assessment of offensive power, defense capabilities and dependence on a computer system. Addiction refers to critical information systems that do not have an adequate replacement in cyberspace. A lower degree of dependence means a higher number when ranking (Clarke and Knake 2010, 99-101).

The relationship of the considered countries from the aspect of cyber capabilities is as follows:

- United States – total 11 (cyber attack: 8; cyber addiction: 2 and cyber defense: 1)
- Russia – total 16 (cyber attack: 7; cyber addiction: 5 and cyber defense: 4)

Both countries are among the world's leading powers when it comes to cyber capabilities. The U.S. probably has more modern offensive capabilities for cyber warfare, but there are certain weaknesses when it comes to defense. Russia has paid much more attention to the defense of national computer networks. Control of critical information infrastructures and the possibility of disconnection from the rest of cyberspace is far greater in Russia than in the U. S. (Clarke and Knake 2010, 99-101).

Disagreement over regulations between the United States and Russia (as well as China) remains high. None of the considered countries is ready for certain restrictions on the freedom of action in cyberspace, which would be regulated by generally accepted norms of behavior and action.

The great world powers compete with each other in several domains to secure their interests and promote their security. In recent years, perhaps the most dramatic area of growing competition has been in cyberspace, where these countries have pursued very different competition strategies, including some that appear to be very risky or destabilizing for international security. The scope and variety of different tools and mechanisms of action in cyberspace is expanding to include such activities as interference in democratic processes and theft of industrial secrets on an increasing scale and level of sophistication. The great powers are also looking for ways to wage large, destructive forms of conflict by virtual means (Mazarr et al. 2022, 1).

## Conclusion

Cyberspace is a global information and communication infrastructure, created as a result of social needs and technological innovations. Economic prosperity, national security and geostrategic influence of states depend on their capabilities in cyberspace.

The constant technological progress with the complexity of the nature of threats imposes the need for constant risk management. From the aspect of security in the domain of information, the negative aspect is that the government is not able or does not have mechanisms to control all computer networks in its territory, among other things due to the ownership issue. Discovering the origins and understanding the seriousness of the threat is very difficult, given the complexity of cyberspace and the very nature of the threat (Vuletić i Đorđević 2021, 251-253).

The society in which we live is characterized by global connectivity, increasing use of personal computers, ease of Internet access. Companies are involved, in all segments, in the race for information as a key resource. Global, interconnected computer networks require global connectivity in solving cyber security problems. Based on all the above, it can be concluded that cyberspace is an unsafe environment and that numerous incidents between the world's leading powers pose a growing social danger due to constant improvement of techniques, relatively simple execution of certain acts and an increasing number of possible perpetrators, from individuals to states. The various non-traditional forms of endangering the information infrastructure of the society can certainly include threats that come from cyberspace.

Given the complexity and possible consequences of cyber abuse, the adoption of internationally accepted regulations is necessary but insufficient in counteracting this phenomenon. Proactive action deters, disables or prevents potential perpetrators, while reactive action eliminates the consequences of compromising the security of computer systems.

Cyberspace is an area that many countries are dealing with more and more, they have their own forces and resources. In addition to being a new area of warfare, cyberspace also represents a domain in peacetime in which there are certain disagreements between great powers, such as the U.S. and Russia. Mentioned examples prove it.

The mentioned domain is not completely regulated by generally accepted agreements and arrangements, which makes it suitable for abuse, which can result

in certain incidents between the United States and Russia causing serious disruption of relations and potentially leading to armed conflict.

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**Dejan V. VULETIĆ, Branislav D. ĐORĐEVIĆ**

**RIVALSTVO SJEDINJENIH AMERIČKIH DRŽAVA I RUSIJE  
U SAJBER PROSTORU**

**Apstrakt:** U radu autori analiziraju sajber prostor, koji predstavlja proizvod brzog razvoja informaciono-komunikacionih tehnologija, njegovu ulogu i značaj koji ima za vodeće svetske sile. Ipak, uz nesumnjive prednosti za savremeno društvo, sajber prostor ima i određene negativne aspekte u pogledu funkcionisanja države. Autori ističu da u sajber prostoru postoje određene pretnje i da su one sve brojnije i sofisticiranije. U strateškim i doktrinarnim dokumentima mnogih zemalja one su nalaze među najvećim bezbednosnim izazovima u 21. veku. Autori objašnjavaju da sajber prostor karakteriše sve veća militarizacija i nesumnjivo vojno prisustvo vodećih svetskih sila poput SAD (SAD) i Rusije. Dalje, autori razvijaju argument da je sve veća zavisnost i upotreba informaciono-komunikacionih tehnologija izazvala, između ostalog, i promenu fizionomije savremenih oružanih sukoba. Sledeći deo rada posvećen je sukobu država u sajber prostoru. U završnom delu članka autori daju primere incidenata između SAD i Rusije i analizira njihovu sposobnost za sajber ratovanje. Autori zaključuju da obe svetske sile imaju respektabilne ofanzivne i odbrambene kapacitete za sajber ratovanje.

**Ključne reči:** informacija, informaciono-komunikaciona tehnologija, savremeni konflikt.



# European Union and Ukraine: the strategic partnership leading to (some)where?

Miloš PETROVIĆ<sup>1</sup>

**Abstract:** This article analyses the evolving nature of the strategic relationship between Ukraine and the EU since the onset of the second decade of the 21<sup>st</sup> century. The author aims to show that, although the two sides have for years been elevating their ties through the neighbourhood policy and the Eastern Partnership strategic initiative, Kyiv's ultimate ambition has always been focused on securing the EU membership perspective. The author considers the Ukrainian EU membership request precarious due to the Union's concerns over stability, Kyiv's territorial integrity problems and the ongoing war, the unfavourable impact for the current membership candidates, but also since such a request sets a precedent for the other eastern partners. To explicate the abovementioned aspects, the author primarily uses the historical method and the document analysis, to clarify in greater detail the chief political events which have gradually led towards the current state. Research conclusions point out that, despite Ukraine's right to apply for EU membership, such a request is unlikely to result in a speedy accession, due to a variety of abovementioned aspects, coupled with a complicated decision-making process in the Union in that regard. In spite of that, the EU intends to continue supporting Ukraine as a strategic partner in a variety of domains, including also an indirect aid in combating the Russian military incursion. The author finds that the EU's response to the membership application will have extensive ramifications not only on the two parties' relations, but also on the enlargement policy and the Eastern Partnership domain.

**Keywords:** Ukrainian crisis, EU membership request, enlargement policy, Eastern Partnership, neighbourhood, Russia, conflict.

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## Introduction

Next year will mark a decade since the inception of the Ukrainian crisis, which emerged as a consequence of the Russian and EU pressures on Kyiv to opt for either Eurasian or pro-Western geopolitical course (Alexandrova-Arbatova 2015, 131). The outcome of the crisis has so far been mixed in the geostrategic terms. On one hand, the Euromaidan protests, supported by the European Union, have resulted in exile of the former President Viktor Yanukovich and the inauguration of the pro-Western government. The country became deeply exposed to what Gawrich, Melnykovska and Schweickert (2010, 1210) referred to as “neighbourhood Europeanization”, an approach related to the transformative developments in the enlargement policy, but aimed towards the immediate geographical “outsiders” without the membership perspective. Kyiv signed the privileged political and economical partnership agreements with the EU, even though its accession aspirations remained unrecognized (European Commission 2017). Furthermore, Ukraine has evolved into one of the most prominent and ambitious members of the Eastern Partnership, a policy platform designed to deepen the strategic ties between the European Union and the post-Soviet European countries (with the exception of Russia). In the domain of trade, during the past decade, the EU has replaced Russia as Ukraine’s top trading partner (WTO 2013; European Commission 2021). In the political domain, the overall approximation between the two sides ensued, and Ukraine became exposed to a variety of EU programs and policies.

Whereas the cooperation with the EU assumed strategic characteristics, conversely, Ukraine became a territorially infringed country, as Russia reacted to the pro-Western foreign policy shift by annexing the Crimea Peninsula and aiding the secessionists in the Donetsk and Luhansk regions. Essentially, the regional war in Donbas has been fought ever since, so far resulting in loss of over 14,000 lives in that part of Ukraine alone (International Crisis Group 2022). Although a range of restrictive measures against Russia have contributed to the feeling of strategic understanding between Kyiv and Brussels, contrastingly, the EU failed to encourage the implementation of the Minsk accords on the Ukrainian side, which resulted in further alienation of the breakaway regions from their *de iure* homeland, and also increased dissatisfaction of the Russian authorities due to the *status quo*.

The strategic partnership between Ukraine and the European Union has been based on (and shaped by) the following chief aspects: (1) the Association Agreement

(which encourages Kyiv's political association with Brussels on the basis of "shared values" like democracy, rule of law, respect for international law and human rights and other EU principles, norms and standards, which lead to deepening cooperation in all domains, including foreign and security policies); (2) the Deep and Comprehensive Free Trade Agreement (leading towards the economic integration with the European Single Market); (3) participation in the Eastern Partnership initiative (as a platform aimed at securing the greater EU strategic influence in the post-Soviet European region); (4) EU support to the country's sovereignty and territorial integrity in accordance with the relevant principles of international law (that is, support to Ukrainian claims over the annexed Crimea Peninsula, the breakaway Donetsk and Luhansk territories and other regions occupied or supported by Russia) and (5) cooperation in the context of Russian engagement in Ukraine (variety of measures ranging from sanctions and embargo against Moscow to the humanitarian, financial, economic and other assistance to Kyiv) (23<sup>rd</sup> EU-Ukraine Summit 2021). On the basis of the Association Agreement and other mentioned aspects, the cooperation between the two sides has been remodelled throughout the past 8 years in political and economic terms, and the EU has evolved into the country's primary partner. Notwithstanding that fact, there have also been some challenges, stemming from the fact that (1) the EU has been unwilling to include Ukraine in the enlargement policy, as well as that (2) strategic cooperation did not envisage mutual defence clauses, that would serve as a guarantee in case of (further) violations of the country's territorial integrity and sovereignty. Similar problems have also burdened the country's relations with NATO, which has also been reluctant to grant Ukraine accession and therefore also an access to defence and other privileges.

In early 2022, the situation in Donbas took a turn for the worse, as the OSCE recorded thousands of ceasefire interruptions (OSCE 2022). This coincided with the build-up of the Russian troops along the Ukrainian borders, which became the subject of the Western diplomatic concerns and discussions with the authorities in Moscow (Shankar 2022). Notwithstanding the military exercises, the Russian representative to the EU Vladimir Chizhov denounced that his country would intervene in Ukraine, referring to such concerns as "hysterical" (Koutsakosta 2022). In spite of that, on February 21<sup>st</sup>, Russian President Vladimir Putin signed the executive orders pertaining to the official recognition of the breakaway republics of Donetsk and Luhansk, justifying the move with the alleged mistreatment and genocidal intents of the Ukrainian authorities towards the local population (President of Russia 2022). Apart from that, as announced during the speech, President Putin also launched a comprehensive military incursion across the Ukrainian territory. Russia referred to the right to intervene as per Article 51, Chapter VII of the Charter of the United Nations, which applies to individual or

collective self-defence in case of an armed attack against a member-state (Charter of the United Nations 2022). Instead, the incursion actually violated the Charter's Article 2, which instructed the UN member-states to refrain from the threat or use of force against the independence or territorial integrity of another states (Ibid). The United Nations General Assembly overwhelmingly supported a resolution demanding that Russia "immediately, completely and unconditionally withdraws all of its military forces from the territory of Ukraine within its internationally recognized borders" (UN News 2022a). As announced ahead of the escalation, the Western partners of Ukraine abstained from the direct engagement, despite the strategic links with Ukraine (Nicholson 2022). Indeed, the EU has reached a unanimous stance regarding the three rounds of extensive sanctions targeting Russia's financial system, high-tech industries and the elite circles, including the disconnecting key Russian banks from the SWIFT network, which the European Commission (EC) President Ursula von der Leyen referred to as "the largest sanctions package in our Union's history" (European Commission 2022a).

The author considers that the EU's reaction as Ukraine's chief strategic partner has reflected the contractual ties between the two sides, whereby the Union has agreed to assist Kyiv in a variety of domains, while officially excluding the direct military involvement. Such logic stems from the fact that mutual defence clauses are only to be triggered in case of violation of sovereignty and territorial integrity of member-countries, which Ukraine is not. Many member-states (that are also NATO countries) have rejected the notion of directly engaging in the conflict. The author aims to show that the EU-Ukraine strategic cooperation, which excludes the option of direct military engagement, has demonstrated its limit in securing the country's sovereignty and territorial integrity. From the perspective of the Ukrainian authorities, such a limited EU response does not value properly the heavy toll of the country's "European choice". According to President Volodymyr Zelensky, his country's efforts should be matched by the "Ukrainian choice of Europe" (UATV 2022). In spite of such expectations, that country's "European choice" does not entitle it to direct EU military engagement, since it is not a member-state, but "merely" a close partner. Correspondingly and perhaps also unsurprisingly, both NATO and European Union have made it clear that they would not send troops to Ukraine but would instead provide defence assistance to Kyiv (Erlanger 2022). Although the Ukraine-EU relations have visibly evolved throughout the past decade, the Brussels stance in many aspects remained similar to 2014, when it unsuccessfully appealed for a diplomatic solution to the conflict. The author considers that the EU's unwillingness to engage directly in military terms derives from the lack of contractual commitment towards Kyiv in that regard. Furthermore, the Ukrainian situation serves as a deterring example for other eastern partners interested in deepening relations with the European Union.



Whereas the EU considers Russian military incursion to constitute an act of aggression, its non-military sanctions (despite being fully in compliance with the framework of strategic cooperation with Ukraine) don't seem to constitute an adequate match to the destructive nature of Russia's hard power. Still, "for the first time ever", the EU has agreed to finance the purchase and delivery of weapons and other equipment "to a country under attack", apart from expanding sanctions against Moscow, but also Minsk, for its supportive role in the conflict (European Commission 2022b). On the other hand, attempting to defend its citizens and territory, Ukraine has been asking for more direct support from the strategic allies. In a very sudden manner, the Ukrainian authorities also filed an application for the country's EU membership, despite the fact that it hasn't been included in the EU enlargement agenda, but in its neighbourhood policy. Ukraine's long-standing European Union accession ambitions and the main political challenges in that regard constitute the focal point of this research.

The author also deliberates on the logic of the Ukrainian authorities' abrupt decision to apply for EU membership. This act has been undertaken in the context of the ongoing crisis, as a symbolic political statement to the European Union that Ukraine should be offered - and provided - more benefits within their strategic partnership. On the other hand, the author identifies several challenges in that regard. Firstly, stability-wise, Brussels does not intend to "import" problems which might compromise the functioning of the EU; secondly, the Eastern Partnership dimension has been designed as an alternative to EU membership and that fact is unlikely to change; thirdly, Ukrainian membership application encourages other eastern partners to follow suit; fourthly, the enlargement policy has been characterized by lack of dynamism and fatigue even in case of long-standing membership candidates from the Western Balkans (WB). The author considers that the Ukrainian membership application serves a dual purpose: firstly, to exert the pressure on the European Union to make a strategic commitment towards Ukraine, and secondly, to remind Brussels regarding the high political, security, territorial and other costs of approximation to that entity.

The author will only marginally reflect on the ongoing violent events in Ukraine, to the degree necessary to depict the strategic challenges which burden that country's "European choice".<sup>2</sup> This research is situated in the domain of European studies, covering the political developments in the EU neighbourhood and

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<sup>2</sup> The term "European choice" has been used within the Eastern Partnership dimension to describe the strategic approximation of those neighbouring countries with the European Union, through the political association and the economic integration. For a more detailed insight consult: Joint Declaration of the Eastern Partnership Summit (Brussels, 15 December 2021), paragraph 8.

enlargement policies throughout the past decade, largely from the perspective of the EU legal and political documents, decisions and activities. Bearing in mind the topicality of the military incursion in Ukraine, this papers' chief arguments and conclusions are somewhat limited by the specific "timing" of this piece. The author stresses that this research does not form part of the peace and conflict studies; henceforth, it does not examine more closely the ongoing war, nor its nature. In the context of this paper, the clashes in Ukraine provide "solely" a backdrop to the analysis of the strategic relationship between that country and the European Union as the main focus of this research. Undoubtedly, the ongoing conflict and its peaceful resolution are fundamental when it comes to the political future of Ukraine. Nonetheless, in this paper, that aspect has an auxiliary and contextual purpose, as part of examining the dynamics and further strategic direction of Ukraine from the perspective of European Union policies, positions and the two sides' overall strategic relations.

The structure of the paper is as follows. The author will firstly provide a historical retrospective of the Ukraine-EU relations since the second decade of the 21<sup>st</sup> century, analyzing the key political events which have contributed to shaping their strategic relations. The author also deploys document analysis approach, focusing on various EU (and other international) legal and political acts. Although their cooperation has long been bounded by the framework of the neighbourhood policy and its Eastern Partnership dimension, the Ukrainian interest in EU membership has been consistent during the past two decades. In the second part, the author will interpret the decision of the Ukrainian authorities to officially apply for EU membership, while outlining the main foreign-political challenges in that regard. Conclusive remarks will be outlined in the final part of this paper. This research aims to depict the sustained ambivalence of the European Union regarding the long-standing accession aspirations of Ukraine, while additionally pointing out to changes in the light of the 2022 military incursion, which prompted an unprecedented political and economic response from the EU as Kyiv's strategic partner.

## **From the Eastern Partnership to the eastern crisis**

The European Union's approach towards the Eastern European post-Soviet neighbours has always been largely influenced by Russia's strategy for that same region. The two strategies have been overlapping since the beginning of the 21<sup>st</sup> century, when the EU enlargement policy started encompassing some of the post-Soviet states (Estonia, Lithuania, Latvia), or bordering on them (Ukraine, Belarus,

Moldova, Russia). Already during the Munich Conference on Security Policy (2007), Russian President Vladimir Putin referred to the NATO enlargement as provoking, pointing out to the statement of the previous General Secretary Mr. Woerner from 1990 that the lack of readiness to place a NATO army beyond Germany represented “a firm security guarantee” for Moscow. The fact that European integration and the transatlantic integration processes were conducted in parallel contributed to the impression in Russia that the two aspects were similarly damaging for its interests in Eastern European space (Milosevich 2021). For instance, out of twelve countries which acceded to the EU between 2004–2007, only two – Cyprus and Malta – were not included in NATO enlargement, meaning that around 84% of those countries have (simultaneously) pursued both the NATO and EU memberships.

Following the second EU Eastern enlargement round in 2007, the eastern flanks of the Union reached the Black sea coast. The admission of Bulgaria and Romania (although subject to specific cooperation and verification mechanisms) not only defined the eastern-most boundary of the Union in a geo-strategically important Black sea region, but also entirely encircled the Western Balkans within the EU (and NATO) territory. Behind the eastern border, the authorities in countries like Ukraine and geographically-more-distant Georgia became hopeful regarding their own European and Transatlantic aspirations, especially having in mind the pro-Western political changes as part of the “colour revolutions” in those countries (Lazarević 2009, 29). Although the membership quest has never been officially endorsed in the European Union’s legally binding documents, during the NATO summit in Bucharest in April 2008, the Ukrainian and Georgian transatlantic membership ambitions were recognized, via invitation to elevate ties through the Membership Action Plan (NATO 2008). The Bucharest declaration also recalled the partnership of NATO with Russia as a “strategic element in fostering security in the Euro-Atlantic area” (Ibid). President Putin, who also attended the Summit, criticized the two neighbours’ recognized accession perspective, adding that NATO “cannot guarantee its security at the expense of other countries’ security” (Erlanger 2008). According to one 2008 transcript, when asked regarding the potential Ukrainian NATO accession, President Putin cautioned that “...Russia might be forced to take military countermeasures, including aiming missiles against Ukraine, if Kyiv hosted foreign bases or joined the U.S. missile defence project...” (Congressional Research Service 2008, footnote 63).

The author of this paper agrees with John Mearsheimer’s observations that the Bucharest summit represented the key turning point in Russia’s relations with the West, the NATO and the EU alike (Chotiner 2022). Only several months later, in August 2008, the Georgian-Russian conflict erupted following the allegations

regarding Tbilisi's attack on South Ossetia (Cheterian 2009, 156). Over the course of days, the secessionist forces of Abkhazia, South Ossetia, supported by Russia through its ground, air and naval capacities, pushed the Georgian forces well into the interior and the Russian President Dmitri Medvedev recognized the two breakaway territories as independent states, which was condemned by most of the international community (NPR 2008). The EU reaction was mixed, generally more supportive of Georgia and its territorial integrity, although some member-states like Italy seemed to also incline towards the Russian argumentation (Maurizio 2008, 135-136). NATO also abstained from directly interfering in the conflict; moreover, the prospects of Ukraine and Georgia joining that military bloc have been waning ever since, despite their long-standing advanced political association with the Alliance. These developments corresponded to some realist views that the US (and also NATO) policy towards conflict in the post-Soviet European space should be governed by the Western pragmatism and the acknowledgement of Russia's regional-power interests (Motyl 2015, 75).

Following the aforementioned events, determined to exert a greater influence in the post-Soviet European space, the EU established the Eastern Partnership initiative for Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine in 2008, aiming to "intensify their relations" (EC COM[2008] 823 final). This marked the beginning of competing interests between Russia and the EU, which has been referred to by some as the "contested neighbourhood", due to diverging views regarding the strategic direction of the post-Soviet European space (Delcour 2017). The pro-European Ukrainian authorities were not enthusiastic about remaining in the framework of neighbourhood policy, but accepted to take part in the project, which envisaged the signing of the privileged political and economic agreements. Meanwhile, the narratives continued to include the country's European Union membership goals, despite the fact that such ambitions lacked an official EU endorsement (BBC 2005).

Be that as it may, the political changes ensued in Ukraine. During the presidential term of Viktor Yanukovich (2010-2014) the strategic foreign policy goals were characterized by the balanced cooperation with both the EU and Russia. Whereas the European integration goal was formally still in place, the political processes in that regard have been hindered and questioned, making the strategic direction of Ukraine confusing (Babenko, Biletska and Pelyak 2019, 14). Although the Ukrainian authorities have been attempting to develop cooperation with both the EU and Russia to a certain degree, the country gradually became exposed to increased pressures from both partners to assume a more specific strategic course. This contributed to a growing geostrategic dilemma in Kyiv and fears that either choice might cause damage to the country's national interests, but also to the

governing elites. The Yanukovich government suspended the decision to sign the strategic partnership agreements with the EU, which was underlined in the Vilnius Declaration of the Eastern Partnership (The Council of the European Union 2013, 3). In response to that, the Euromaidan protests erupted across the country, with EU political support. These demonstrations and their goals were perceived as staged by Russia, and contrary to its own preferences and interests. Russia backed the secessionist movements in the Crimean Peninsula and the Donbas region (Donetsk and Luhansk), infringing the territorial integrity of Ukraine from the perspective of the international law. Following the annexation of the Crimea Peninsula, the Donbas dispute remained active as part of the low-intensity (albeit protracted) conflict (Jović-Lazić and Lađevac 2018, 29). Meanwhile, the EU obtained the strategic leverage by inviting the post-Maidan Ukrainian authorities to sign the advanced Association Agreement (AA) in Brussels in March 2014. By doing so, the EU somewhat compensated for its previously flawed strategic approach which contributed to the adverse (violent) flow of the crisis, while symbolically elevating ties with Kyiv (Howorth 2017, 121-122). Contrastingly, the Ukrainian geopolitical shift resulted in the territorial disunity and the emergence of secessionist conflicts, both of which the European Union, the country's primary political partner, has not proven able to resolve, having in mind its deficient and underdeveloped security instruments (Petrović 2019, 36-37). John Mearsheimer criticized the Western role in the Ukrainian crisis as provoking against Russia, calling for Kyiv's de-westernization and "political neutralisation" (similar to the Austrian Cold-war model) as a manner to address Russian security and political concerns (Mearsheimer 2014, 85-87). Nonetheless, Russia and the Western alliances continued drifting apart. While sanctions against both the breakaway authorities and the Russian subjects have been expanding for years, and many international bodies have condemned the violation of Ukraine's territorial integrity, the progress has not been recorded and the conflict have started assuming a chronic character.

In the meantime, the European Union and Ukraine have deepened their strategic cooperation on the basis of the political and economic treaties. Ukraine agreed to voluntarily adapt its legislation to EU normative framework in a variety of domains, as part of the economic integration and political association with the Union, without the membership perspective (Redko 2017, 100). These agreements represented the most advanced privileged acts signed between the EU and the third countries (as part of the Eastern Partnership neighbourhood dimension), through which, according to Baležentis and Yatsenko (2018, 57), "the two parties moved from partnership and cooperation to political association and economic integration." Unfortunately for Ukraine, the economic integration goal was not matched by the political one, so the country's membership perspective remained

unrecognized. Such a logic reflected the very nature of the Eastern Partnership dimension, designed as a platform to enable deeper integration without the prospects of membership (Petrović 2019, 64). While the EU idea seemingly aimed to achieve a privileged partnership as the highest level of mutual cooperation, Ukraine still remained interested in securing the recognition of its accession aspirations. The “post-Maidan” President, Petro Poroshenko, announced that the country would do so by 2024 (TASS 2019).

During the previous decade, the EU became Ukraine’s primary trade partner, accounting for a third of the country’s foreign trade, with a growing tendency every year; this was enabled by the privileged partnership agreements, which gradually lift import and export barriers and harmonize standards and norms (up to 80% compatibility with the EU *acquis*) (Vošta, Musiyenko and Abrahám 2016, 30). The political domain remained characterized by the “political association”, meaning that Ukraine was expected to adapt and follow EU policies, but without the perspective of integration, that would allow it to enter the EU and have a say in its political institutions (Petrović 2018, 16). Despite the limitations caused by the EU’s dislike towards EU membership ambitions of Ukraine (and also other partners like Moldova and Georgia), the two sides remained strategically connected and their cooperation was also characterized by a common approach towards the Russian activities in the breakaway territories. Meanwhile, Russia has evolved into the EU’s strategic rival largely due to diverging views and activities in Ukraine and elsewhere in the contested neighbourhood. On the other hand, neither the EU, nor its leading member-states which take part in the Normandy Four, have managed to aid Ukraine in retrieving sovereignty and territorial integrity, which was infringed earlier due to the country’s pro-Western strategic course. The Minsk protocols, which were supposed to secure reintegration of Donbas region in Ukraine under high degree of self-rule, have never been fully implemented, and the breakaway regions remained outside Ukrainian control, despite lacking an international recognition.

As 2022 started, the situation in Donbas deteriorated, and several thousand ceasefire interruptions occurred. In February 2022, Russian President Vladimir Putin officially recognized the so-called Donetsk and Luhansk People’s Republics as independent, referring to the need of “protection of people who have been mistreated and subjected to genocide for eight years” as Russian troops crossed the Ukrainian boundaries from various directions (Weber, Grunau, Von Hein and Theise 2022). Attacks on Ukraine’s military and civilian capacities was condemned by many international actors. The Council of Europe (2022) promptly suspended the participating rights of representation of Russia in the Committee of Ministers and in the Parliamentary Assembly, due to violation of its obligations under the Statute of that organization. In addition, Ukraine responded by filing a claim against

Russia before the International Court of Justice (ICJ), the UN's highest legal authority, arguing that Russia's genocide claims in Donbas have been false, and that these allegations served as an argumentation towards recognizing the Donbas breakaway regions and pursuing a so-called "special military operation" against Ukraine (ICJ 2022). Within one week, Russian incursion resulted in occupying various border regions in that country, death of several hundred Ukrainian nationals, the exodus of over 1 million people abroad and bombardment of various places (UN News 2022b). By mid-March (that is, within several weeks since the onset of hostilities), several UN sources have confirmed nearly two thousand casualties and over 3 million refugees abroad, which illustrates the severe magnitude of the war (UN News 2022c).

Belarus has also participated in the campaign, including the enabling of Russian attacks from its territory into northern Ukraine. During several recorded months prior to the military incursion, Russia and Belarus approved the so-called military doctrine of the State Union, an executive decree which foresees the deepening of supranational integration during the 2021-2023 period (in domains ranging from security to monetary policies) (Aljazeera 2021). As a consequence, the European Union and a variety of international actors introduced sanctions against Russia (and also Belarus), targeting the financial subjects and individuals, media outlets, institutions, enterprises, the transport sector etc (EU sanctions map 2022). The EU also agreed to support Ukraine financially for the purpose of its defence, and member-states like Germany, but also countries like USA, also pledged to bilaterally support Kyiv. Still, all sides declared that they would not directly engage in the Ukrainian conflict, but only support the country's war efforts in a roundabout way. These aspects disappointed the Ukrainian authorities, which proclaimed that they were "abandoned" by the Western allies and have repeatedly been asking for their direct involvement - despite lacking the NATO or EU membership, on the basis of which a collective support would be legally binding (Bodkin and Barnes, 2022).

## **The "weak spots" of Ukraine's EU membership request**

According to the Article 49 of the Treaty on European Union (TEU), any European state which respects the common values of the Member States may apply for EU membership (the application is handed to the Council, while the European Parliament and national assemblies are notified) (ENPEN 2022b). In line with Article 2 of the TEU, these values encompass human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the

rights of persons belonging to minorities (Ibid). Being a European country, Ukraine certainly meets the geographic criteria. That aspect should not be understated, having in mind that it served as an argument for declining the application of Kingdom of Morocco back in 1987 (European Parliament 1998). Contrastingly, as regards the other conditions, in addition to the traditional EU unwillingness to recognize its membership aspirations, the Ukrainian ambition does not seem very probable in the short-term.

Following the Russian incursion in February 2022, Ukraine announced that it would apply for joining the European Union, despite not being included in the enlargement policy, and the lack of legal ground to do so either in its Association Agreement, or any other binding document. Aside from Turkey, the enlargement agenda assembles the countries whose membership perspective was recognized during the Thessaloniki summit of the European Council in 2003. The Western Balkan countries have been part of that policy for two decades, but even their EU membership applications were carefully planned much in advance. For example, Bosnia and Herzegovina applied for membership in 2016 following more than a decade of being the “potential membership candidate”, and even such a step was unofficially considered by some as premature and somewhat controversial due to an apparent lack of consensus within EU institutions (Nezavisne novine 2016). Moreover, the Bosnian Stabilisation and Association Agreement, unlike its Ukrainian counterpart, refers to the country’s future EU membership (MVTEO 2008, 3). During the Western Balkan enlargement round, the application was followed by a comprehensive questionnaire of the European Commission, covering several thousand questions in all sectors, on the basis of which further decisions regarding the candidate status recognition could be made. Following the European Commission’s opinion, the Council needs to endorse the candidacy unanimously. Later on, the same steps are undertaken regarding the decision on opening the membership negotiations. In the case of Bosnia-Herzegovina, a positive decision regarding the candidacy has still not been reached, six years following its membership application. Considering this example, it does not seem realistic that the European Commission could technically treat the Ukrainian application in a fast-track manner, all the more having in mind the state of war in that country. Implementing approximately 100,000 pages of EU norms and engaging in accession negotiations would require a large team of experts to navigate the legal and technical process, coupled with extensive state administration reform and meeting the common market criteria, all of which doesn’t appear even remotely possible during the wartime (Grabbe and Kirova 2022).

In addition, the EU conditionality in enlargement policy has been very stringent while evaluating the state of meeting the membership criteria, through carefully



evaluating each step during the lengthy negotiation process. According to Maja Kovačević (2020, 138) who refers to Othon Anastakakis, by introducing the new criteria and applying the conditionality ever earlier, the EU has been increasingly paying more attention to the “accession journey” than to the membership itself, by scrutinizing each technical step, which affects the strategy credibility. The conditionality principle has been traditionally deployed in the enlargement policy, but also in the Eastern Partnership domain, having in mind the similar logic: to encourage reform processes for the sake of deepening the integration process (Verduna and Chira 2011, 450). These conditions include the Copenhagen criteria (political – e.g. the rule of law or stability of democratic system; economic – a functioning market economy and institutional – regarding the enforcement of the *acquis*) as well as the European Union’s absorption capacity to admit new members (ENPEN 2022a). In addition, for the Western Balkans, an additional set of conditions was introduced through the “Stabilisation and Association Process”, mostly regarding the improvement of neighbourly cooperation and regional relations (ENPEN 2022c). These conditions were invented for the Western Balkans due to its post-conflict nature. Ergo, it seems likely that an Eastern Partnership region, if being considered for membership, would be evaluated through an additional, specifically tailored set of conditions. That seems probable having in mind the graveness of the political, economic, social and other situation in the partner countries like Ukraine, the underdeveloped regional relations, but also specific democratic challenges stemming from their own recent political history, among other things (which sets them apart from the previous enlargement rounds).

Come what may, as Russian incursion into Ukraine advanced, President Zelensky and the Ukrainian government announced the request for EU membership. Moreover, the Ukrainian side asked for an “immediate accession, via a new special procedure” (RFE/RL 2022). In an emotional appeal to the European Parliament, Zelensky stated: ...“we are giving our lives for values, freedom, for rights and the desire to be equal as much as you are... prove that you are with us... prove that you will not let us go” (Bounds and Pop 2022). His speech was greeted by the European Parliament representatives, and a resolution was passed with a support of 90% of the present MPs, calling for the recognition of the candidate status for Ukraine (European Parliament 2022). Still, despite the sizeable backing, one should bear in mind that the European Parliament resolutions are of non-binding character, so calls for *de facto* inclusion of Ukraine into enlargement policy do not need to have favourable outcomes. Nevertheless, the request for EU membership represents a watershed event in the context of advancing the mutual ties, and its “timing” has been highly symbolic: during the Russian incursion into Ukraine.

The European Commission also appeared more inclined towards that idea than before. The EC President, Ms. Ursula von der Leyen, during her speech at the European Parliament Plenary on the topic of Russian aggression against Ukraine, while referring to EU membership ambitions of Kyiv, stated that nobody should doubt that a nation “that stands up so bravely for our European values belongs in our European family” (European Commission 2022c). In addition, numerous EU member states support the recognition of Ukrainian membership aspirations, although they remain limited to Central and Eastern European region. The leaders of Bulgaria, Czechia, Estonia, Latvia, Lithuania, Poland, Slovakia and Slovenia, in an open letter, called on other member states and EU institutions to “conduct steps to immediately grant Ukraine a EU candidate country status and open the process of negotiations” (President PL 2022). The initiative was also supported by Romania, Croatia and Hungary, accounting for a total of eleven member-states (Maksimov 2022). Despite the dramatic circumstances, such a scenario could be considered as discriminatory towards the long-standing Western Balkans (WB) candidates. For instance, the current frontrunners, Montenegro and Serbia, have been granted the candidacy and opening of accession negotiations following a decade of political and economic transformative efforts, whereas countries like Albania and North Macedonia still await to begin their accession talks, after two decades of being part of the enlargement agenda. In addition, all WB candidates have in place the Stabilisation and Association Agreement, which, in addition to other documents, contains a reference to EU membership, unlike any of the Association Agreements signed with the eastern partners.

Nevertheless, while the support to the Ukrainian EU cause has never been more evident, that doesn't mean that it is universally backed. Many in the European Union remain reluctant regarding further steps. European Council President Charles Michel hinted that there were “different opinions and sensitivities” among EU members regarding the Ukrainian application, adding that, either way, the European Commission would have to issue a formal opinion and the Council would then decide (Harris and AFP 2022). To illustrate this aspect more closely: back in 2016, the voters in Netherlands rejected to endorse even the non-controversial Association Agreement with Ukraine, conditioning its signing with additional guarantees from all other member-states that the act did not represent a basis for considering membership for Ukraine (Zhabotynska and Velivchenko 2019, 363). As regards the two most influential EU countries, France and Germany, their reactions have so far been restrained. President of France Emanuele Macron, who seeks re-election in 2022, has been focused on the security aspect and the crisis diplomacy with both Ukraine and Russia, while underlining that “France is not at war with Russia” (RTS 2022). The new German government has initiated

radical changes by suspending the North Stream Two pipeline and pledging to militarily support Ukraine through the export of weapons, while also announcing a sharp increase in its own military spending, which would meet the NATO defence expenditure requirements (Kinkartz 2022). On the other hand, pertaining to the Ukrainian EU request, German Foreign Policy Minister Annalena Berboek stated that “EU entry is not something that could be done in months”, implying that it requires comprehensive and far-fetching transformative efforts (Riegert 2022). Having in mind that the adoption of an EU membership application requires unanimous support from 27 member-states, and that the backing of Western European countries in that regard has not been visible so far, it appears that this aspect would require significant time. As one German media illustrates, the Ukrainian application represents “a difficult topic, at the wrong time” (Mayr 2022). The author of this paper agrees with that quote and further outlines several foreign-political challenges to the Ukrainian EU accession request.

The author finds it comprehensible that Ukraine seeks extensive support from the European Union as its chief strategic partner in this time of need. Be that as it may, it is unprecedented that a country at war files a request for EU membership, during an acute phase of the foreign invasion, while expecting a positive decision. If the EU has been unwilling to consider Ukraine’s membership prospects all along (including the past 8 years of the regional conflict in Donbas), the author finds that the chances for adopting the accession model for Ukraine, especially the fast-lane-one, seems to be even more unrealistic now, in the wake of the Russian incursion. This constitutes the first argument for the non-recognition of its membership aspirations at this moment: the European Union does not want to import conflicts and problems that might disrupt its functioning. One of the chief arguments lies in the Article 42 (7) of the Treaty of the European Union (the mutual defence clause) which provides that if any EU member falls victim to an armed aggression on its territory, other members are obliged to aid and assist by all the means (EUR-Lex 2022). That means that, in case of Ukraine’s hasty EU admission, due to the ongoing territorial and sovereignty problems, other member-states would be obliged to directly engage in conflict with Russia, which, as already stated, many, most or all were unwilling to do. Even in the case of official recognition of the country’s membership perspective in the long-run, after the war consequences largely heal, any possibility of regional conflicts in Ukraine and the Russian involvement in those conflicts weakens the Ukrainian EU application. Apart from concerns over being included in the conflict, some member states are also apprehensive regarding the impact of the new admissions on their economies, including their labour markets, which is also evident in case of the officially recognized membership candidates (which are demographically much smaller).

Secondly, the Eastern Partnership initiative has been designed as an upgrade of the neighbourhood policy and is not organically connected to the enlargement policy. Although the neighbourhood policy does simulate certain aspects of enlargement policy, it does not entitle its members to EU membership, although it does attempts to repeat its transformative successes (Cadier 2013, 52-53). Actually, the EP was designed precisely to respond to greater ambitions of countries like Ukraine or Moldova to approximate as much to EU as possible, through political association and only economical integration, without the membership option. The adoption of this approach and the recognition of Ukraine's membership perspective would not only undermine this policy (by leaving out its largest and most influential country), but would also pave the way to others to follow suit. The recognition of Ukrainian membership perspective would practically also entitle other eastern partners – Armenia, Azerbaijan, Georgia, Moldova and Belarus – to require the same from the EU. That might represent an end of the Eastern Partnership dimension.

Thirdly, the potential inclusion of the eastern partners in enlargement policy might marginalize the long-standing accession efforts of the Western Balkan candidates, who have been undertaking comprehensive transformative efforts during the past two decades, attempting to meet the EU membership criteria. Their own accession process has been burdened with difficulties regarding meeting the democratic performance criteria, statehood aspects, stability and so on. The potential inclusion of post-Soviet countries in the enlargement agenda might further sideline their own membership ambitions. The alternative solution would be to speed up the lengthy EU accession process in the Western Balkans in order to "make room" for the additional candidates, but that also does not seem feasible, bearing in mind the gloomy perception of the enlargement policy as such, even without the new potential candidates. Even in its current state – encompassing the Western Balkan countries populated by less than 20 million people – the European Union's enlargement policy has for years been ineffective and stagnant.<sup>3</sup> The Serbian and Montenegrin applications for membership, filed during the first decade of this century, have still not resulted in EU accession. The potential inclusion in the enlargement agenda of Ukraine (which solely numbers over 40 million people, not to mention the other eastern partners), having in mind the size, statehood and democratic challenges in that country, might disrupt not only the accession policy, but in the long-run also the increasingly delicate balance of power within the EU.

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<sup>3</sup> Although Turkey had started its accession negotiations during the first decade of the 21<sup>st</sup> century, they have practically been suspended by the EU since the allegedly-attempted *coup* back in 2016, due to human rights and rule of law concerns.

Considering everything mentioned, the author finds that the EU application for membership primarily bears a symbolical character: to remind the European Union partners regarding the extreme demographic, political, economic, security, statehood and other costs of Ukrainian “European choice”, and to secure as much support in that regard as possible. Apart from that, Ukrainian authorities would like to secure a greater strategic commitment from the EU. Actually, as the Russian incursion started, President Zelensky also unsuccessfully appealed for a fast-track NATO membership, which would entail the country to trigger the Article 5 of the Washington Agreement regarding the collective-defence obligation – a move that was ignored by the Alliance political leaders (Bjerg Moller 2022). In other words, aiming to strengthen his country’s position during the ongoing war, President Zelensky asked the Western partners to secure the speedy accessions to both NATO and the EU. Although it does not seem likely that the EU would reject its strategic partner’s request at this difficult time, in order to try to address this aspect in a relatively urgent mode, the European Union would need to fundamentally alter its approach both towards the enlargement policy and the Eastern Partnership, in a fast-track fashion. That doesn’t seem probable having in mind the bureaucratic and slow decision-making processes within the bloc, coupled with the lack of internal consensus on the issue even during the peacetime. Despite the fact that the submission of the application occurred as part of the wider context of war in Ukraine, and the short-term outcome will certainly be influenced by that fact, the membership request is likely to have a profound long-term effect on the two sides’ relations.

## Concluding remarks

*“1. The Russian Federation, the United Kingdom of Great Britain and Northern Ireland, and the United States of America, reaffirm their commitment to Ukraine, in accordance with the principles of the CSCE Final Act, to respect the independence and sovereignty and the existing borders of Ukraine.”*

Memorandum on security assurances in connection with Ukraine’s accession to the Treaty on the Non-Proliferation of Nuclear Weapons, Budapest, 5<sup>th</sup> December 1994<sup>4</sup>

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<sup>4</sup> [Budapest Memorandum] Memorandum on security assurances in connection with Ukraine’s accession to the Treaty on the Non-Proliferation of Nuclear Weapons, concluded in Budapest, December 5, 1994. <https://treaties.un.org/doc/Publication/UNTS/Volume%203007/Part/volume-3007-I-52241.pdf>.

Prior to the strategic approximation between Kyiv and the EU in 2014, Ukraine didn't have any territorial integrity problems. The 1994 Budapest Memorandum, which nominally vouched for Ukrainian sovereignty and integrity, has been respected for almost two decades. The country, which used to be the second-largest republic of the USSR, emerged from the collapse of the Soviet Union territorially unaffected, unlike many of its neighbours in the Caucasus or in Moldova. All the same, the Euromaidan *coup* and the signing of the Association Agreement with the EU was perceived as a red line for Russia, which reacted by supporting secessionist movements in the Crimea Peninsula, and in Donbas region. It absorbed the first due to its primary strategic significance, while the later remained outside of Ukrainian central government control, with a possibility of reintegration through the Minsk protocols. Ukraine had evolved into a country with territorial problems, as a consequence of Russian reaction towards deepening of Kyiv's ties with the European Union. Moreover, it did not manage to restore its integrity (not even partially), nor to secure its primary goal: EU membership, that has been recognized only for the Western Balkan candidates and Turkey. Meanwhile, Ukraine didn't secure NATO accession either, but its interest was nevertheless used by Moscow as part of its argumentation to intervene in 2022.

The Ukrainian application for EU membership has been submitted during the military incursion in that country. It is unclear whether the move has been politically endorsed from all member-states. Besides, such an act actually contradicts the boundaries of the neighbourhood policy and its Eastern Partnership dimension. That might reflect negatively on the generally protracted EU path of the Western Balkan countries. For instance, there are calls from certain European leaders to include the eastern partners in enlargement policy and allow them to accede to the EU by 2030 (Tanjug 2022). Such initiatives might undermine the two decades of enlargement efforts that are being conducted by the Western Balkan candidates, neither of whom has been offered an entry date or at least an indicative accession period. Considering the WB experience regarding the accession process, it appears unlikely that Ukraine's membership application could be endorsed in a fast-track fashion, and pave the way for the country's negotiations with the European Union in the short-run. The logic of the Ukrainian authorities might have to do with the specific "timing": to try to capitalize on the European Union support to secure recognition of the country's long-standing accession aspirations. While Ukraine's territorial integrity has been infringed also due to its membership aspirations in EU and NATO, Ukrainian authorities have been trying to secure a membership perspective as a political compensation for the unfortunate political and military events which have been ongoing in that country. Having in mind the universal support in EU towards the Ukrainian position in the ongoing war, the authorities

in Kyiv might have presumed that a “now or never” moment has arrived regarding the recognition of its membership perspective. The symbolism of the pro-European Ukrainian stance in the face of the conflict sends a powerful message to the European Union, and constitutes a model example of its cross-border normative power. It seems unlikely that the membership application would be turned down, but its fast-track consideration and the swift adoption of the candidacy also seem overly optimistic, bearing in mind the protracted bureaucratic *modes operandi* of the EU. Additionally, the presence of the Russian troops in Ukraine, although constituting only the secondary, contextual focal point of this study, represents the most urgent political aspect, that reflects on all domains of the EU-Ukrainian cooperation. Therefore, the political developments in that regard are also likely to affect further EU decisions when it comes to Ukraine’s goals for ever-closer relations with the Union.

Despite the advanced political, economic and other ties with the Western countries and organizations, and their own mediating attempts between Russia and Ukraine, the announcement that they would not engage directly in Ukraine once again revealed the boundaries of the strategic cooperation between Kyiv and European Union. The EU’s unwillingness to act directly in Ukraine and limitations to aiding Ukraine in hard-power domain represent the biggest challenges towards the preservation of the strategic ties between the two sides at this particular moment. Also, the Russian incursion into Ukraine sets a warning example to other eastern partners who wish to develop ties with the EU. The outcomes are such that the EU’s diplomatic and soft-power skills couldn’t compete with Russian hard power, while the Ukrainian non-membership status made it a favourable target for Russian involvement. By filing a membership application, Ukrainian authorities are attempting to secure at least a long-term recognition of its accession aspirations. On the other hand, the EU, which has long been reluctant to address those ambitions, has been faced with such a request in the wake of the most serious crisis in Europe in the 21<sup>st</sup> century. The response of the European Union to the Ukrainian membership request will certainly have a long-term effect not solely on their mutual ties, but also on the development perspectives of enlargement and Eastern Partnership domains. While the outlooks for EU membership for that country appear to be higher than before, that fact is overshadowed by the dramatic course of the war in Ukraine, which outcome will have a profound impact on the EU integration aspect as well. When it comes to restoring peace and securing further development, the European Union appears to bear a particular moral responsibility, which has become entangled with the Ukraine’s long-sought membership ambition.

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Miloš PETROVIĆ

EVROPSKA UNIJA I UKRAJINA:  
STRATEŠKO PARTNERSTVO U (NE)KOM PRAVCU?

**Apstrakt:** Predmet analize u ovom članku je priroda strateških veza između Ukrajine i Evropske unije, uključujući i skorašnje političke događaje u kontekstu ruskog vojnog napada 2022. godine. Premda dve strane već godinama unapređuju svoje veze kroz susedsku politiku i stratešku inicijativu Istočno partnerstvo, autor nastoji da pokaže da se neprolazna ambicija Kijeva oduvek ogledala u obezbeđivanju priznanja perspektive članstva u Evropskoj uniji. Autor smatra ukrajinski zahtev za članstvo u EU neizvesnim iz nekoliko razloga, počevši od zabrinutosti Unije oko očuvanja vlastite stabilnosti, preko problema vezanih za očuvanje teritorijalnog integriteta zemlje, do toga da taj akt predstavlja presedan za druge istočne partnere, zaključno sa činjenicom da uključivanje novih zemalja može dodatno poremetiti aktuelnu agendu proširenja Evropske unije. Pored analize pravnih i političkih dokumenata Evropske unije i drugih međunarodnih aktera, autor upotrebljava i istorijski metod u cilju objašnjavanja gorespomenutih aspekata, kroz analizu glavnih političkih događaja koji su vodili ka sadašnjem stanju. Zaključci istraživanja ogledaju se u konstatovanju da, premda Ukrajina ima pravni osnov da podnese aplikaciju za članstvo, nije izgledno da taj zahtev može da rezultira brzim pristupanjem Uniji usled gorespomenutih razloga, ali i složene procedure odlučivanja u tom domenu u samoj EU. Međutim, u kontekstu aktuelne krize, EU planira da podrži Ukrajinu kao strateškog partnera u različitim domenima, uključujući i vojne napore u odbijanju ruskih napada, iako to neće činiti na direktan način.

**Cljučne reči:** ukrajinska kriza, zahtev za članstvo u Evropskoj uniji, politika proširenja, Istočno partnerstvo, Rusija, sukob.





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# Chinese cultural soft power: A case study of Bosnia and Herzegovina

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**Abstract:** This paper analyses the impact of Chinese public diplomacy and soft power (cultural soft power) on the public perception in Bosnia and Herzegovina. We have tested the three specific images China aims to project in Bosnia-Herzegovina: China as an ancient civilization, a leader of the developing countries and a responsible partner in the international community. We will see whether cultural soft power, applied by means of Confucius Institutes, academic exchange programs and think tanks, has an impact on the public perception in Bosnia and Herzegovina. The first part tackles the theoretical framework of public diplomacy, soft power and cultural diplomacy. The second part delineates the institutional, diplomatic and regulative framework of soft power and introduces the stakeholders, i.e. academic exchange and Confucius Institutes. The final part analyzes the survey and interviews and presents the results as to how these various public diplomacy tools are shaping the perception of China in Bosnia-Herzegovina. The paper concludes by arguing that Chinese public diplomacy produces soft power in Bosnia-Herzegovina, which is in turn positively perceived.

**Key words:** cultural soft power, public diplomacy, cultural diplomacy, state image, Confucius Institutes, academic exchange.

## Introduction

Public diplomacy remains an important element in international relations as communication increasingly gains the role of vital means in accomplishing foreign policy strategic interests. Unlike diplomacy, which according to the Cull definition

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is an actor-to-actor relationship in international relations management (Cull 2008, 51), public diplomacy represents the attempt of managing international relations through the actor (the government of one state) and the public (of the other state or states) relations (Cull 2008, 51). "The core concept of public diplomacy is that it is the way in which international actors advance their foreign policy not by engaging one another, but by engaging with a foreign public. It really is the communication component of foreign policy" (Cull 2008, 51). The basic elements of the public diplomacy are listening, advocacy, cultural diplomacy, cultural or academic exchange and broadcasting (Cull 2008). The role of cultural diplomacy as the element of the public diplomacy has been recently neglected in the western countries whilst it is getting more important in Asia, especially in China. If the product of public diplomacy or cultural diplomacy is attractive to the public of other countries, its resources are producing soft power, making soft power a product or an attraction derived from public diplomacy (Stevic 2020).

All the aforementioned elements can impact the national image, hence making public diplomacy a crucial tool for China, concerned about its image and attempting to do as much as possible to deliver the image of traditional values-appreciating country, non-threatening partner and leader in the "community of the shared future for mankind" concept. Cultural diplomacy as cultural exchange thus became increasingly important elements for China. Language promotion as part of the cultural diplomacy is an important aspect and tool besides art, sport, music, etc. Hartig states language learning as the ideal tool contributing to better mutual understanding (Hartig 2017). Unlike individual aspects of language learning, functional approach of the state reflects in the language learning via institutes i.e., British Council, Cervantes, Goethe Institute, Institute Française, *Kongzi Daxue* 孔子大学 or Confucius Institute as the Chinese tool of Cultural diplomacy. Unlike the majority of dominant researches tackling Chinese soft power and work of Confucius Institutes, (Wuthnow 2008; d'Hooghe 2010; Hartig 2017) claiming that Chinese image projection representing China as the traditional values country orientated towards Confucius values serves only to mask Chinese intentions that are predominantly hegemonistic, we hereby promote a thesis that appreciation for the wider context, possible through cultural and educational institutions, enables better relations and successful cooperation and better positioning in the international relations and on the crossroad of various interests and influences where BH is currently situated. The thesis is in line with the Chinese school of IR represented by the Qin Yaqing, Zhao Tingyang and Yan Xuetong.

When Joseph Nye, who originally coined the phrase of soft power, defined three resources of soft power: culture, political values and foreign policy, Chinese

academics recognized the importance of soft power for the “branding” of China and building the image which will present China as a non-threatening partner and a responsible stakeholder as well as a technologically developed state. Nye defined culture as a “set of values and practices creating the meaning for society” (Nye 2004, 11). “When one’s state culture presumes universal values and its politics promote values and interests that other share, it increases probability of obtaining its desired outcome” (Nye2004, 11). Whilst Nye sees the civil society as the main carrier of the soft power, in China, this concept is defined by the Chinese Communist Party. “The government cannot and should not control culture” (Nye 2004,17); however, this concept in China is understood as the CP lead initiative. As China shows, the state can be the initiator in the creating of soft power and certain attractiveness lays in the Chinese political model and its success hence the structure of the soft power and its effects are different to Nye’s conclusion.

The cultural soft power term itself has been coined by the former Secretary General of the Chinese Communist Party Hu Jintao in the report for the 17<sup>th</sup> CP Congress in 2007. (Xinhua, Full text of Hu Jintao’s Report delivered at the 17th National Congress of the Chinese Communist Party, 2007). Chinese academics relied on Nye’s concept at the beginning but with the time they adjusted the concept to the Chinese cultural soft power and its role in the international relations. The Chinese term of soft power has the character of which denotes culture (*wenhua* 文化) and presumes education, sport, media, etc.) The *wenhua* 文化 term has specific meaning in the Chinese recent history.<sup>2</sup> The culture is seen as the Chinese global power, a tool to help China tell its “side of the story” aiming to confront “the Western cultural hegemony” (打破西方文化霸权) and even out the unequal relation with the dominating Western world. (Li 2016) Cultural soft power concept is an important concept both in the domestic and international context as seen in the Hu Jintao’s speech who stated that the “cultural soft power is not only an important component of the national power but an important source of national cohesion too” (Xinhua 2007). Chinese traditional culture is thus seen as important resource. Traditional values and philosophy are offering alternative values in resolving international issues and alternative view on the international situation. This is where the Chinese school of international relations comes in hand and their view according to the “moral

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<sup>2</sup> 4<sup>th</sup> of March movement during the 20ies of the last century represented also a warning on the “cultural invasion” coming with the Western imperialism. Cultural revolution (1966-1976) started by Mao Zi Dong, political and social chaos aiming to regain Mao’s political domination in the CCP which resulted with the permanent destruction of some of the most important cultural and traditional remains.

realism”, “relational theory” and “*Tianxia*”<sup>3</sup> theory based on the traditional knowledge, values, history, that China is offering to the international partners as the cultural soft power or additional value in the area of international relations theories. The concept of the Chinese cultural soft power was for the first time mentioned in the Chinese academic circles in 1997 (Wang and Lu 2008, 427).

Majority of Chinese experts promote the “cultural school” (*wenhua pai* 文化派) that places culture at the core of soft power. Cultural soft power thus remains the most popular term with the top leadership, starting with Hu Jintao and continuing with Xi. The moral values associated with Chinese culture include respect for community, integrity, harmony, and accommodation of differences (*he er butong* 和而不同) (Wang 2016). One of China’s core tasks, therefore, is to explain China’s moral values to the world and to offer an attractive alternative to the Western values. According to Wang and Lu, the Chinese view of soft power *ruanshi li* (软实力) is “possibility to persuade others with reasoning and moral principles” (Wang and Lu 2008, 427). This understanding is suitable to Yaqing’s<sup>4</sup> understanding of the “background knowledge” which presumes making decisions and reasoning taking into consideration historical, cultural and language treats or according to the moral realism of Yan Xuetong<sup>5</sup>, (Wang and Lu 2008, 427). Cultural soft power in the official sources and opinion was best described by the current PR China President Xi Jinping

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<sup>3</sup> Zhao Tingyang concept of *Tianxia* explains the world system based on the ontology of coexistence by the means of relational rationality which gives the priority to decreasing mutual hostility in relation to the individual rationality giving priority to its own interest. The impartial will of heaven is above all.

<sup>4</sup> Yaqing relational theory with the epistemology based on the dialectics of harmony and *zhongyong* “with relationality as the metaphysical component of its theoretical hard core. It conceives the International Relations (IR) world as one composed of ongoing relations, assumes international actors as actors-in-relations, and takes processes defined in terms of relations in motion as ontologically significant. It puts forward the logic of relationality, arguing that actors base their actions on relations in the first place. It uses the Chinese *zhongyong* dialectics as its epistemological schema for understanding relationships in an increasingly complex world. This theoretical framework may enable us to see the IR world from a different perspective, reconceptualize key elements such as power and governance, and make a broader comparison of international systems for the enrichment of the Global IR project.” (Yaqing 2016)

<sup>5</sup> Yan Xuetong is the founder of “moral realism” theoretical construction or “binary theory” stating that the power of state determine strategical interests but types of leaders determine strategy for accomplishing those interests. In accordance with that theory, China can change international system in the 21<sup>st</sup> century if it applies principles of honesty and justice both in China and worldwide. Moral realism and offensive realism of John Mearsheimer represent the conflicted theories and Mearsheimer states that diplomatic strategy of China relying on the moral as the priority will not be sustainable as the same made USA even more aggressive in the international politics.

during his address at the 12<sup>th</sup> Session of the Politburo, 30<sup>th</sup> of December 2013 “....it is necessary to fulfil four requirements in order to strengthen Chinese soft power: building strong foundation for development of cultural soft power, emphasizing Chinese values, representing the uniqueness of the Chinese cultural charm and strengthening international discourse” (China 2013). So, culture is seen as the diplomatic tool, which China is using in the projection of its soft power. Chinese culture, specific hence attractive for the foreign public, the tool to introduce China as the benevolent trust-worthy nation (Lai 2012b).

This introduction of cultural diplomacy, and the Chinese view on this helps us understand this concept in the context of diplomatic relations between BH and China, encompassing the elements of investments, cultural and academic exchange and cultural diplomacy as China present it. In order to introduce this subject, we will use Popovic (2020), interpretation of the above-mentioned Nye’s model of four elements of cultural diplomacy and its impact on the cultural institutes. The first one is the cultural similarity between sponsor and host country because “common cultural, ethnical or religious identity is in the core of unincumbered intercultural communication” (Popovic et al. 2020, 50). The only commonalities we can find between Bosnia and Herzegovina, specifically Republika Srpska and China is not in the common cultural identity but more towards the inclination for traditional values and identification of suffering in NATO bombing and feeling of being threatened by the USA and insisting on the non-interference in internal issues of one country. The second element is economic cooperation and the “host country need to be open to economic incentives and political support” (Popovic et al. 2020, 50). Bosnia and Herzegovina, in both entitles is very much leaning towards Chinese loans and investments filling the gap left after EU decreased its activities and investments. This situation is also rapidly changing in the last couple of years where the US and EU are putting additional pressure on BH to decrease economic projects and loans with China (Doehler 2019). The third element is the political similarity (Popovic et al. 2020, 50). In this case, even though there is no political similarity, BH as part of former Yugoslavia had socialist system which China often cites as the “joint past” and “traditional friendship” (Zweers&Shopov2020). Chinese political system and values are not repulsive to Republika Srpska especially, which does not pay much attention to China political system and does not view it as oppressive. The last element is intercultural dialogue which secures the success of cultural diplomacy. According to Nye, if the cultural diplomacy elements are not attractive, they do not represent cultural diplomacy but propaganda. The last point Popovic states as an obstacle to accepting the Chinese cultural diplomacy is the open intercultural dialogue which provides successfulness of cultural diplomacy and public diplomacy techniques that are not attractive to the host country, does not

represent diplomacy but propaganda (Popovic et. al 2020). We will present the Chinese public diplomacy tool and attempt to show that, unlike in the some of the Western countries, cultural activities and multicultural dialogue China conducts are not seen as propaganda in Bosnia and Herzegovina, thus confirming the “cultural soft power” and its positive perception in BH.

Based on the empirical research we made into specific stakeholders in BH as receivers of the elements of public diplomacy, we will measure whether the projected images have impact on the host’s perception. We will evaluate the effects of promotion of the Chinese language and culture via Confucius Institutes in BH.<sup>6</sup> Since 2019, the umbrella body of CIs in the world, HANBAN Office of Chinese Language Council International (国家汉语国际推广领导小组办公室) affiliated to the Chinese Ministry of Education, was transformed into the recently established Chinese International Education Foundation and the Centre for Language Education and Cooperation. The Chinese International Education Foundation (CIEF) is a non-profit charitable organization jointly initiated by 27 universities, enterprises and social groups which is dedicated to supporting Chinese international education projects worldwide, including Confucius Institutes (CIEF 2021). The Center for Language Education and Cooperation (CLEC) is a non-profit professional educational institution for international Chinese language education, affiliated with the Chinese Ministry of Education (CLEC 2021). Its main functions are developing National Chinese Language Proficiency standards across the world and hosting certification tests; supporting the provision of teaching resources; operating international Chinese language education programs such as the “Chinese Bridge” series and China Studies Program; and organizing relevant activities of international exchanges and cooperation. Confucius Institutes operate directly on university campuses and employ local staff from the University and Chinese staff paid by the partner universities and sent for the period of two to four years to the host

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<sup>6</sup> Bosnia and Herzegovina have two Confucius Institutes opened in Sarajevo and Banja Luka at the respective universities. Both Confucius Institutes are organizing language and cultural courses. Sarajevo (Sarajevo CI) is organizing public courses of Chinese language but according to the home director, the biggest interest and attraction for the public are all activities related to health i.e., Taiji or Traditional Chinese Medicine. Kong Fu is the activity which is traditionally popular in Sarajevo and has had its history in pop culture from 80ies when Bruce Lee was very popular in former Yugoslavia. (Stevic 2018). CI at the University of Banja Luka was established three years following the establishment of Sarajevo CI in 2018. Both CIs in Bosnia and Herzegovina initially had good start and students attending lectures and cultural activities. (Univerzitet u Sarajevu 2021) However, as the time passed by, the number of courses and activities decreased in Sarajevo. There are numerous reasons, and we would like to emphasize the lack of local staff and local sinologists as the most important for further development of CIs work.

countries (HANBAN, 2019). Therefore, the role of Confucius Institutes in this research is introduced as the specific instrument to convey the message of diversity and hybridity of Chinese culture and values (medicine, philosophy, architecture, music, costumes, martial arts, painting, calligraphy, etc.) rooted in the long civilizational tradition hence offering an alternative to the Western values system (Lai 2012b, 85). Specifically, this research supports the Hartig thesis that language promotion via cultural institutes have crucial role for the cultural diplomacy of one state (Hartig 2016, 5).

## Methods

### *Sample and procedure*

The sample within the quantitative research, i.e.. the online survey consists of 191 respondents, of which 16.0% are students at the Confucius Institute University of Banja Luka and University of Sarajevo. The gender structure is well balanced, with a slightly higher percentage of the sample being women (56.6%). Most respondents have the status of unemployed (79.6%). The age of the respondents ranges from 16 to 66 years, with an average age of about 22 years ( $M = 22.09$ ,  $SD = 9.34$ ). Statistical analysis was performed in two software, exploratory factor analysis in FACTOR version 9.2. (Lorenzo-Seva&Ferrando, 2013), while other statistical analyzes are in R (R Core Team, 2013).

Three groups of standard indicators were used for the survey, which relate to 1. attitudes towards China, 2. ethnocentrism and 3. openness to experience.

A new group of indicators was based on Wuthnow's theory was created to measure attitudes towards China (Wuthnow, 2008), which defined three images that China seeks to project: as an ancient civilization worthy of respect, a leader in developing countries, a responsible partner in the international order. The instrument contains 15 items, with five items related to each of the dimensions. Within each dimension, two items are negatively defined, while the other three items are positively defined. Respondents give answers on a scale that has three options: yes, no, I don't know. Since this is a new instrument, its metric characteristics and factor structure were tested in this study, and in the Results section, these indicators are also presented.

The GES (Generalized Ethnocentrism Scale; Neuliep, 2002) was used to assess ethnocentrism. This scale has 22 items, with 15 items used in the final analysis. Within the instrument there are a few positively defined items (example of "Most

other cultures are backward compared to my culture”), while a smaller number, only three, of negatively defined items (example of “Lifestyles in other cultures are as valid as and those in my culture”). A higher score on this scale indicates more pronounced ethnocentrism, and respondents give answers on a five-point Likert-type scale. Measurement of openness according to experience was performed through 10 items from the Big Five Inventory Instrument (BFI; John & Srivastava, 1999; Lakic, 2012) related to this personality trait. The instrument consists of several positively defined items (example of the item “I consider myself a person who is imaginative”) and a smaller number of negatively defined items (example of the item “I consider myself a person who prefers routine tasks”). A higher score on this scale indicates a pronounced openness to experience, and respondents give answers on a five-point Leckert-type scale.

## **Results**

We created a survey that measures three separate dimensions of cultural soft power: China as an ancient civilization worthy of respect (example of items from the survey “China has a rich history and culture based on its ancient past”), China as a leader in developing countries sample item from the survey “China is a technology giant”) and China as a responsible partner in international relations (example of an item from the survey “China’s foreign policy does not endanger other countries”). These items were formed in accordance with the ideas of the author Joel Wuthnow, who gave the definition of the perception that China is trying to project, which we used in this research. Since this is a newly created instrument (survey), the factor structure of the instruments (number of factors and the amount of factor saturation) and certain quality indicators of the factor structure (internal consistency, replicability and semi-confirmatory suitability indices) were checked. This check was performed by exploratory factor analysis (EFA), where due to the violation of the assumption of multivariate normal distribution, ULS (Unweighted least squares) on the polychoric correlation matrix was used as the extraction method (Tabachnick and Fidell 2007). To check the number of factors, three techniques were used that prove to be the most adequate and precise in determining the number of latent factors – optimal implementation of parallel analysis on the matrix of polychoric correlations, classical (Horn) parallel analysis on the Pearson correlation matrix and HULL method<sup>7</sup> (Subotic, 2013).

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<sup>7</sup> The Hull method aims to find a model with an optimal balance between model fit and number of parameters. That is, it aims to retrieve only major factors (Lorenzo-Seva, Timmerman and Kiers 2011).



All techniques indicate that this is a one-factor solution, i.e., that the predicted three dimensions, empirically, still form one dimension. Essentially, although this is one factor, i.e., one dimension, it encompasses the content of the already mentioned three dimensions. After estimating the number of factors, the EFA was performed and in the first step, due to low factor saturation and low coefficients of shared variance (ECV; Ferrendo & Lorenzo-Seva, 2018), items were excluded (“Chinese technology is equal to other countries’ technologies”), 11 (China) wants to conquer other countries”) and 13 (“Respect for the wishes and interests of other countries is characteristic of China”) from the first version of the instrument. The EFA procedure was then repeated without these three items. EFA results show that the one-factor solution ( $KMO = .79$ ,  $\chi^2(66) = 574.2$ ,  $p < .001$ ) explains 45.36% of the variance. Table 1 presents the items from the final version of the factor saturation survey.

Table 1: EFA results (saturation factor)

Items:

	$\lambda$
I think Chinese culture and civilization are respect worthy	.89
China has rich history and culture based on the ancient civilization	.94
Ancient civilization of China is worthy and equal to other ancient civilizations	.69
Chinese civilization is less worthy from civilizations of other countries	.74
China does not have ancient and important past	.39
China is the biggest economic power	.42
Chinese economy is growing annually	.66
Chinese economy is stagnating	-.39
China is technological giant	.58
China wishes only its own development	-.52
China wishes world peace and mutual appreciation amongst states	.66
Chinese foreign policy endangers other states	.57

By analyzing Table 1, it is noticeable that the factor saturations range from  $\lambda = .39$  to  $\lambda = .94$ , where the average factor saturation is  $M\lambda = .62$  which is above the lower recommended limit ( $M\lambda = .50$ ) to assess the quality of the factor structure according to some authors (e.g., Tabachnick & Fidell, 2007). In support of the fact that this is a quality factor solution, there is also data on internal consistency, which in this case is  $\alpha = \omega = .88$ , which is above the recommended limit  $\alpha = \omega = .70$  (Kline

2000), high replicability coefficients  $HL = .95$  and  $HO = .82$  (recommended minimum value is  $HL = H - O = .80$ ; Ferrando & Lorenzo-Seva 2018), as well as partially satisfactory semi-confirmatory suitability indices – i.e. satisfactory height  $GFI = .951$  (recommended minimum value is  $.950$ ; (Hu & Bentler 1999) and unsatisfactory height  $RMSR = .127$  (recommended value is below or slightly above  $RMSR = .073$ ; (Harman 1962). In general, it can be said that this survey (instrument) is valid from the aspect of factor validity. In accordance with the obtained EFA results, a summation or average score was formed for this survey, which was used in further analysis, with a higher score indicating a more positive view of China.

In addition to the fact that “Ethnocentrism” and “Openness” according to experience can influence the results, these psychological constructs can be used to check the criterion validity of a survey measuring attitudes towards China. In order to verify this type of validity, a correlation analysis<sup>41</sup> was conducted, the results of which are presented in Table 2.

	Attitude towards China	Ethnocentrism	Openness towards new experience
Attitude towards China		-.37	.27**
Ethnocentrism			-.34**
Openness towards experience			

Note \*\*- $p < 0.01$ .

The results in Table 2 support the criterion validity of the instrument measuring Attitudes towards China. Namely, it has already been mentioned that the higher score on the mentioned instrument represents a more positive view of China, then a negative connection with ethnocentrism (lower ethnocentrism, more positive attitude towards China), as well as a positive connection with Openness to experience (higher openness, more positive attitude towards China). Correlations range from low to medium intensity intensities (Cumming, 2012).

Table 3 presents the basic descriptive indicators of the surveys (instruments) used in this study. In addition to the results of the survey on seeing China, instruments were used to assess ethnocentrism and openness to experience as personality traits, because we believe that these two psychological constructs could influence the results.

Table 3. Results of descriptive statistics, internal consistency and difference between the group of attendants and non-attendants of the Confucius Institutes

Instruments	N	Min	Max	M	SD	Sk	Ku	a	g
Attitude towards China	12	1.17	3.00	2.62	.31	-1.51	4.04	.75	.53*
Ethnocentrism	15	1.00	3.93	2.04	.57	.54	.08	.84	-.08
Openness	10	1.80	5.00	3.74	.62	-.43	.08	.81	.38

Note: N-number of items; Min-Minimum empirical value; Max-maximum empirical value; M-arithmetic mean; SD-standard deviation; Sk-skjunis; Ku-kurtosis;  $\alpha$ -Cronbachov coefficient of internal consistency; Hedges'g coefficient of difference between two groups; \*-p<.05.

Regarding the results presented in Table 3, it is important to note that all instruments used have satisfactory internal consistency (Kline, 2000).

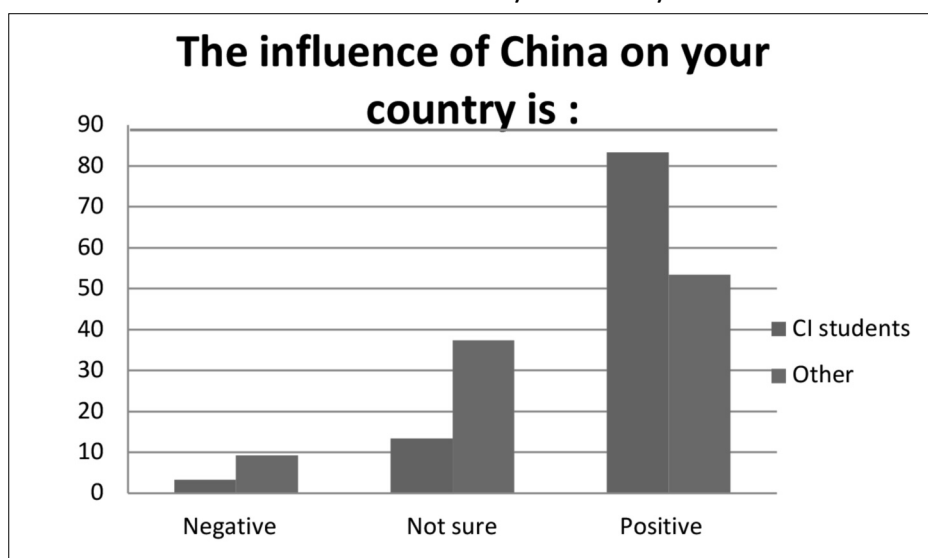
This data is important because it indicates that there is little or no effect on the remaining results (differences between groups or correlation coefficients). Also, information about the groups of students and non-students on the used instruments is important. The only statistically significant difference was obtained on the instrument measuring Attitudes towards China. According to Cumming (2012), this effect can be described as a medium-intensity effect. The differences were measured by Hedges' g, which is an alternative measure to the popular Cohen d where the g coefficient takes precedence in situations where the two groups differ greatly in size as is the case in this study. We have shown that the activities on learning the language and culture of China are important and influence a more positive attitude towards China.

In order to check whether ethnocentrism and openness to experiences have an effect on the differences between students and non-students at the Confucius Institute in relation to the attitude towards China, a moderation analysis was conducted. This analysis was performed in the SPSS package PROCESS version 3.0 (Hayes, 2018). The moderator model looks like the X variable (independent) in the first case was the scale of ethnocentrism, and in the second openness to experience, Y (dependent) variable Attitude towards China, while the moderator (M) was a categorical variable - students / non-students at Confucius institute. In both cases, no moderator effect was found, ie in the case of ethnocentrism -  $F(1,187) = .01$ ,  $p = .99$ , and in the case of Openness to experience -  $F(1,187) = .96$ ,  $p = .33$ . The reason for this result may be the existence of a disproportion in the size of groups of students and non-students.

The online survey also included a set of questions related to respondents' (positive or negative) perceptions of how China behaves or what effects it has on

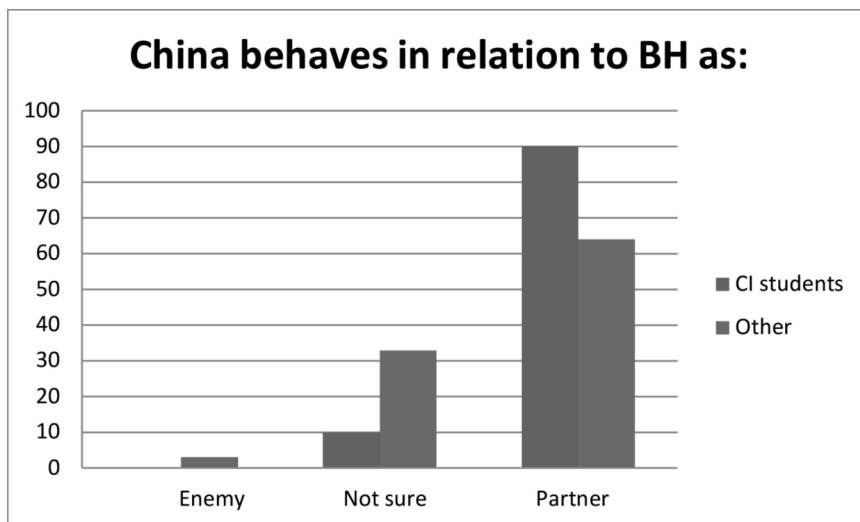
Bosnia and Herzegovina. Unlike the previous survey, which was operationalized in the form of a composite (average) score, here we will present the answers of respondents who are either students or non-students at the Confucius Institute in the form of graphs, and the results in the graphs refer to the percentage of respondents.

*Graph 1. Frequency of answers to the question  
“China’s influence on your country?”*



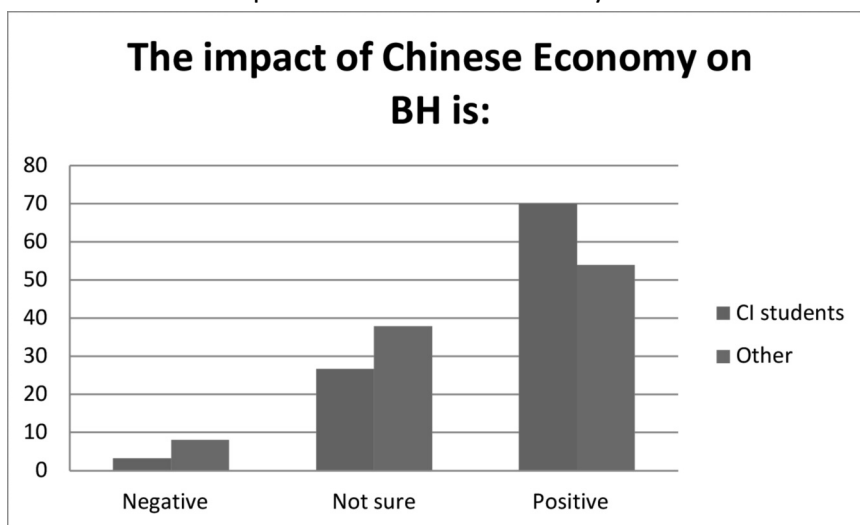
Graph 1 shows that there are differences between students and non-students of the Confucius Institute in terms of seeing (positively or negatively) China’s influence on Bosnia and Herzegovina. Both groups of respondents estimate the negative impact of China on Bosnia and Herzegovina in a very small percentage (up to 10% for the group of non-participants). The differences between these two groups are more evident in the answers “I’m not sure” and “positive”, with non-participants being more inclined to the first mentioned answer, while participants are more inclined to the second answer.

*Graph 2.* Frequency of answers to the question  
“Does China have a relationship with BH?”



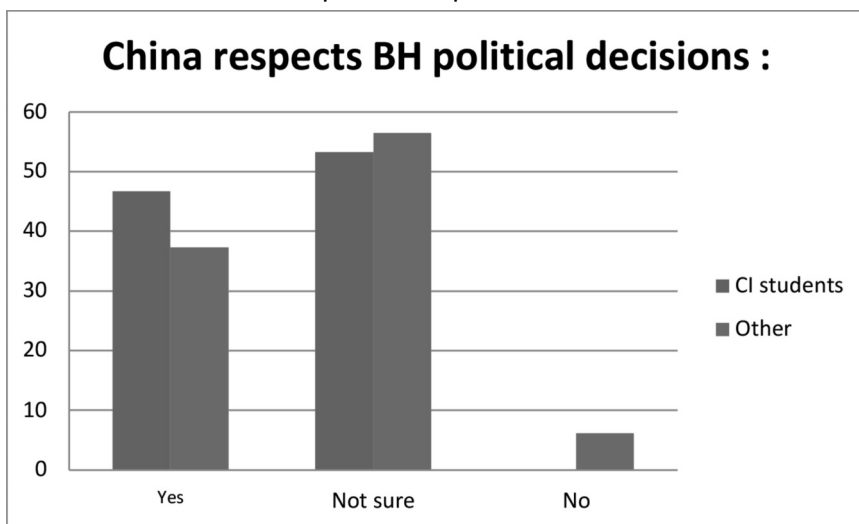
A similar tendency of the answer can be noticed in Graph 2, where absolutely no student of the Institute has circled the “enemy” option.

*Graph 3.* The frequency of answers to the question  
“The impact of the Chinese economy on BH is:”



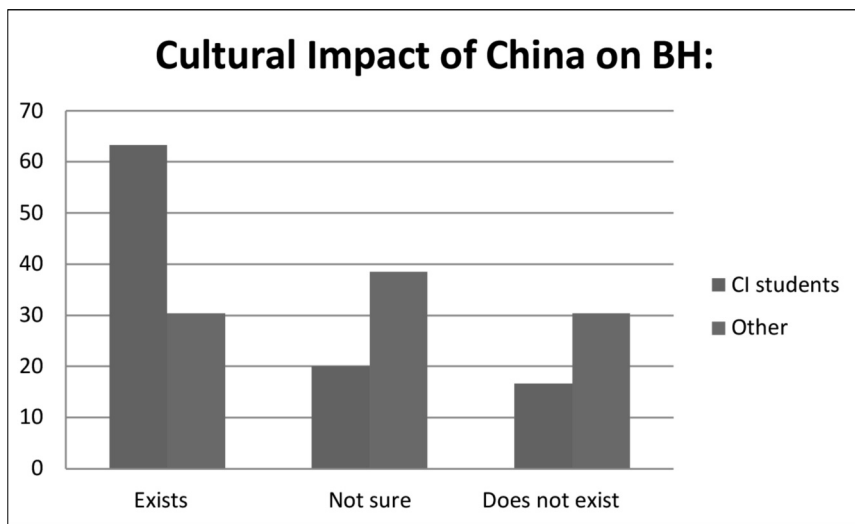
The answers in Graph 3 follow the tendency to answer questions 1 and 2. This tendency is reflected in the almost equally represented answer to the three offered options, and in this case, there is a slight difference in the frequency of answers between the two groups.

*Graph 4. Frequency of answers to the question  
“China respects BH’s political decisions:”*



Graph 4 also shows a similar tendency to answer, especially the yes / no options, i.e., positive / negative in the context of the previous questions, but also, there is a very similar way of answering the “I’m not sure” option between the two groups of respondents, and this option is most often chosen. We think it’s because they are other questions (including the next question), much easier, i.e., effects such as the economy and the relationship with the state are more explicit and more present in the media (e.g., it is very noticeable if a Chinese investor opens a working organization in Bosnia and Herzegovina), while this issue is more implicit and difficult to observe. Nevertheless, students choose the “yes” option more than non-students.

*Graph 5. Frequency of answers to the question  
“China’s cultural influence on BH”:*



The tendency observed in the earlier charts is also noticeable in Chart 5. There are differences of opinion between students and non-students at the Confucius Institute regarding China’s cultural influence, i.e., students are logically exposed to Chinese culture directly and see and follow all events related to China, and due to this exposure, they have a more positive attitude towards Chinese culture and China in general.

## Discussion

The research has ascertained that academic exchange and Confucius Institutes are an effective soft power tool. All respondents cited changes in thinking about China after getting to know China better through language or various cultural activities through academic visits and exchange with Chinese universities. Also, personal engagement of individual professors and deans who travelled to China influenced the improvement of cooperation with Chinese universities, the development of Sinology studies and greater interest in China.

We tested three images by quantitative research comparing Confucius Institute students and non-students, and by qualitative research that included academic

staff, members of think tanks who resided in China, as opposed to those who had no contact with China. In Chart 1, which examined China's influence on BH, it is noticeable that there are differences between students and non-students at the Confucius Institute in terms of seeing (positively or negatively) China's influence on Bosnia and Herzegovina. Both groups of respondents estimate the negative impact of China on Bosnia and Herzegovina in a very small percentage (up to 10% for the group of non-participants). The differences between these two groups are more evident in the answers "I'm not sure" and "positive", with non-participants being more inclined to the first mentioned answer, while participants are more inclined to the second mentioned answer. We also highlight Graph 5. Frequency of answers to the question "China's cultural influence on BH:", where it is clear that there are differences of opinion between students and non-students at the Confucius Institute regarding China's cultural influence. Participants, who are directly exposed to Chinese culture, both see and follow all events related to China, and due to that exposure, they have a more positive attitude towards Chinese culture and China in general.

The research confirmed the thesis that the "cultural soft power" projected by the People's Republic of China through Confucius Institutes and academic exchange as key institutional mechanisms for the realization of "soft power", i.e., achieving public diplomacy of the People's Republic of China, decisively contributes to understanding China and understanding of its foreign policy. Research has shown that academic exchange is an effective soft power tool. China is investing heavily not only in higher education but also in internationalization. All respondents reported changes in thinking about China after getting to know each other through language or different cultural activities, and the personal involvement of individuals influenced improved cooperation with Chinese universities, the development of Sinology studies and greater interest in China. A group of respondents who had no contact with China mostly had a positive opinion and believes that China's behavior in international relations is correct, that China respects other countries regardless of their power and size. Of course, some respondents believe that China is trying to have global and imperial supremacy in the world by using "soft power", but that its behavior is adequate and not to the detriment of other countries but is trying to satisfy its interests. This and similar opinions indicate a lack of adequate knowledge and various sources of information, as well as China's inability to present itself in the right way, especially in Eastern European countries, which are always at the crossroads of interests, but also with dominant sources of information from Western countries. Students studying in China could get acquainted with Chinese customs, culture, learn a language, and through language gain an understanding of Chinese thought in philosophy and Chinese values. In addition to students, the academic



staff who stayed in China, through their later work and commitment, they influence the strengthening of ties and better cooperation with Chinese universities.

The cultural activities that both CIs organize fit the desired image China wants to portray in Bosnia-Herzegovina by promoting language, culture and traditional values. The Banja Luka University CI additionally organizes lectures on modern and contemporary China aiming to educate students and introduce development accomplished since Chinese economic opening up in 1978 lead by Deng Xiaoping (KI UNIBL 2021) These lectures are also intended as the preparation for the Sinology Department due to be opened in October 2022 (KIUNIBL 2021). We argue that CIs work is not one-way public diplomacy only but an opportunity for both countries thus enabling BH to promote its literature, music and other cultural traits in China (KIUNIBL 2019). Prior to the COVID-19 pandemic, both universities' CIs had the opportunity to participate in the global conferences organized by that time HANBAN. This was an excellent chance for rectors and deans to meet their counterparts from all over the world and increase potential internationalization of their respective universities (CI UNIBL 2018). Unfortunately, this all seized with the pandemic and the contacts with partner universities remained on the online basis only, which significantly impacted the quality of cooperation and partnerships. Summer camps for students from BH were another excellent opportunity to not only practice their Chinese skill but to see China for most of the students, for the first time.

Bosnia and Herzegovina do not have similar projects which uses joint efforts in the promotion of cooperation and language courses. As stated previously, CIs belong to home universities but fund their activities with funds, previously arriving from HANBAN and now from partner universities based on the proposed list of projects. Another advantage of these institutes on campuses is the possibility to introduce Chinese language which has not been taught previously at either of those two leading universities in BH. The CIEF official stance is that CIs will help local universities in establishing study programs for Chinese language and in case of University of Banja Luka, we have the confirmation of this approach as previously explained (Stevic 2020)

## Conclusion

China sees public diplomacy as an indispensable tool for its foreign policy in order to improve the international image by telling its story and presenting a specific self-image. Chinese leaders understood the importance of the perception

of one country in international relations and focused on a people-based approach, that is, creating a perception in the publics of other countries. The Chinese language, which has long been an elusive medium in communication, is increasingly becoming a tool of public diplomacy and a symbol of China's opening. In this context, this study represents an internationally active China that takes its place in the global order but is also concerned about its own image. As we stated in the introductory discussion, every public diplomacy aims to serve national interests. Public diplomacy in China serves China's foreign policy interest as a reflection of unhindered economic development, which is not in conflict with the interests of Bosnia and Herzegovina in particular. The goal of public diplomacy is to promote the Chinese national interest in BH and to make its voice heard, and to present China in accordance with certain images that we have specifically singled out here as the subject of research. The representation of "real China" in the world provokes debate and skeptical approach in Western countries.

China is viewed differently by the European Union and the Western countries as compared to the views held by Bosnia-Herzegovina, Serbia and the Central and Eastern European countries (d'Hooghe 2010; Turscanyi et al. 2020). The common point is a relatively small level of knowledge of Chinese culture, history, values. In the West, this lack of knowledge causes misperceptions of China as a threat, and in others, the representation of China exclusively in a positive light or as a source of new political and economic opportunities, without deeper analyses or understanding. There is still very little information about China, especially in Bosnia and Herzegovina, which traditionally has no developed study of Sinology or much interest in studying China. This does not apply to Serbia, where Oriental studies have been studied since 1926, and within it, the beginnings towards the study of China as well. A deeper understanding of China, "additional knowledge", creates a basis for greater knowledge of new insights, knowledge-based policies and better cooperation

China, which accounts for a fifth of the world's population and a fifth of total GDP, is the world's second-largest economy, the world's largest exporter and importer of goods, remains a major factor in the international system. While we cannot influence the way the world is viewed through the prism of danger and growing power, hegemony and conflict, we can better listen and learn to understand what China wants today, what it says and what it represents. Sinology studies, which include an interdisciplinary approach to the study of China and Chinese civilization, will enable new generations to gain better insight and help better cooperation with China. An additional value would be the establishment of a think tank that would bring together professors and students dealing with China and produce recommendations for the adoption of policies and strategies related

to China and cooperation with China. Academic study of the People's Republic of China considering all aspects of this five-thousand-year-old civilization, tradition, philosophy, language and culture represented and continued by modern China today and its influence in the modern world, especially in the Western Balkans and Bosnia and Herzegovina is necessary for proper orientation foreign policies and strategies of Bosnia and Herzegovina and the Republika Srpska.

In addition, these findings will be supplemented with the new results on the two-year basis survey conducted in BH. Future research should consider comparative research with CIs in the region and the potential effects of the current global situation.

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Ljiljana STEVIĆ

**KINESKA KULTURNA MEKA MOĆ:  
STUDIJA SLUČAJA BOSNE I HERCEGOVINE**

**Apstrakt:** U radu je analiziran uticaj koji kineska javna diplomatije i meka moć (kulturna meka moć) imaju na javno mnjenje u Bosni i Hercegovini. Testirane su tri specifične slike koje Kina želi da projektuje u Bosni i Hercegovini: Kina kao drevna civilizacija, lider zemalja u razvoju i odgovoran partner u međunarodnoj zajednici. Razmatra se da li kulturna meka moć, primenjena putem Konfucijevih instituta, programa akademske razmene i *think tank* institucija, utiče na percepciju javnosti u Bosni i Hercegovini. U prvom delu rada dat je teorijski okvir javne diplomatije, meke moći i kulturne diplomatije, dok se u drugom ocrta institucionalni, diplomatski i regulativni okvir meke moći i predstavljaju zainteresovane strane, odnosno akademska razmena i Konfucijevi instituti. U završnom delu analizirane su anketa i intervjui i predstavljeni rezultati o tome kako ovi različiti alati javne diplomatije oblikuju percepciju Kine u Bosni i Hercegovini. Rad se zaključuje tvrdnjom da se meka moć kineske javne diplomatije ostvaruje u Bosni i Hercegovini, kao i da je ona prihvaćena.

**Ključne reči:** kulturna meka moć, javna diplomatija, kulturna diplomatija, državni imidž, Konfucijevi instituti, akademska razmena.

# **SCIENTIFIC REVIEW**



## **The World is Not a Blank Canvas: Or Why Should We Teach Political Geography?**

Mihajlo Kopanja<sup>1</sup>, Pavle Nedić<sup>2</sup>

*Okunev, Igor (2021). Political Geography. Bruxelles: Peter Lang. 474 pp. ISBN: 978-2-8076-1621-9 DOI: <https://doi.org/10.3726/b17747>*

This article was not written *by* geographers *for* geographers. On the contrary, this article was written by authors interested in international and security studies and is meant for those studying international problems. This is an important note to highlight because no matter how porous the boundaries between social science disciplines are, researchers tend to stay within the confines of the familiar. IR researchers read IR works, are familiar with IR works, and rely on IR works – for the most part. But as John Agnew (1994, 56) points out, IR tends to fall into what he calls the “territorial trap”, seeing “geography as a body of fixed facts setting the environment for the action of territorial states that are essentially the same today as 200 years ago”. Even when geographical notions are present, they are mostly either reduced to what Agnew discusses – the state as a spatially fixed unit, domestic/foreign polarity, and the state as a container of society (Agnew, 1994) – or they have some relatively marginal importance in the theoretical causal mechanism (e.g. Walt 1987; Mearsheimer 2001). Simply put, notions such as a billiard table or even tectonic plates (for example, see: Krasner 1982) fail to encapsulate the full spatial complexity of our world. The world is not a blank canvas, and to better understand the complex and multifaceted political processes and structures, it is necessary to consider the relations between the political subjects and different units in physical space.

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This is where political geography comes in! Political geography as a scientific discipline studies the spatial dimension of politics. As Richard Hartshorne (1960, 56) puts it quite elegantly, it is “the study of the variations of political phenomena from place to place”. As a sub-discipline of geography, political geography studies area differentiation (Cohen 1975, 3) by combining knowledge of political science and geography. Therefore, the world is not a blank canvas for political geography because not only do political phenomena vary from one part of the world to the other, but their differentiation matters in our understanding of political processes *both in concrete cases as well as in general*. The last line is not highlighted for no reason. While IR does take into account specific spatial factors when it comes to case study research, we cannot say the same for general IR theorising – the balance of power works the same at any time and in any place. To sum it up, improving our study of international *problematique* requires not seeing the world as a blank canvas, but instead refining our understanding of the complex and multifaceted political processes and structures and their impact. The first step to that is to teach and learn political geography.

Among many great political geography textbooks (e.g., Glassner and de Blij 1986; Gallaher et al. 2009), one of the latest additions to this corps – *Political Geography* by Igor Okunev, Professorial Research Fellow & Director at the Center for Spatial Analysis in International Relations, Institute for International Studies, MGIMO University, aspires to be the benchmark for such an endeavour. Gerard Toal (2021) hails it as “the ultimate political geography textbook”. John Pickles (2021) counts it among the most important political geography and geopolitics textbooks in recent decades. A similar view is given by Mikhail Grachyov (2021), who puts Okunev’s new look at “old science” as “an authoritative source to be cited by researchers”. The authors of this paper share such a view. The textbook offers a systematic breakdown of crucial terms, concepts, and subjects of this scientific discipline, making it useful both for newcomers to the topic as well as experts alike, due to its clear structure, easy-to-understand explanations, and comprehensiveness.

The textbook itself is divided into twelve chapters. But, it ought to be highlighted from the beginning that not all chapters are of the same importance to those studying international *problematique*. While the authors of this paper argue that geography matters, this does not automatically mean that all fields of research in geography matter to the same extent. Okunev’s textbook strives to be an all-encompassing tool for teaching political geography in its totality. Therefore, it is understandable why, for non-geographers, some segments can be of secondary relevance. The first chapter, *Introduction to Political Geography*, lays out the key concepts that are then delved deeper into in the following

chapters. Okunev (2021, 19) defines political geography as a “discipline concerned with the spatial dimension of politics”. Such a definition diverges slightly from those given by Hartshorne or Cohen because it implies a greater level of explication given to the discipline. Reading Hartshorne’s definition, given above, one might think that political geography is more descriptive than explanatory in the sense that it identifies political variations in different areas of the world. Okunev’s view of the discipline provides a more encompassing foothold because it implies that political geography observes politics through spatial variables, therefore having greater explanatory potential.

However, we must point out that this definition of political geography brings it very close to our understanding of geopolitics – i.e., *the spatial analysis of (international) politics*. This is especially true when it comes to the second chapter of the textbook, as we will discuss later in the paper. Some might see this as a “double-edged sword” of sorts. On one hand, geopolitics did evolve from political geographic considerations, making such connections logical (e.g., Mackinder 1904; de la Blache 1926). But already during the 1940s, authors pointed out that geopolitics was closer to political science than to geography, meaning that geopolitics and political geography did evolve in separate directions (Cahnman 1943, 55). On the other hand, from 1945 onwards, political geographers strived to remove any association between their discipline and geopolitics because of the usage of the term by Nazi Germany. However, such a view of geopolitics suffers from the *reductio ad Hitlerum* – an association fallacy meaning that if you share something with Hitler (Nazi Germany), your position is automatically wrong/invalid. Geopolitics, seen as the spatial analysis of international politics, need not necessarily have anything in common with its use by the likes of Haushofer’s Munich Club and can be a useful way of understanding international problems. Okunev’s definition of political geography, which brings it closer to geopolitics, can serve both disciplines – bringing political geography closer to IR but also stripping geopolitics of the possibility of future misuse, as it had been done in Nazi Germany.

Perhaps more importantly, Okunev distinguishes between several levels of spatial organization. Now, it is important to note that this is a story of scale and not a story of levels of analysis. After Kenneth Waltz differentiated the levels of analysis in *Man, the State and War*, IR researchers mostly used them as mutually exclusive analytical categories (Waltz 1959). If we exclude works like Putnam’s on two-level games or Buzan’s on the concept of security, researchers have begun theorising on several levels of analysis, primarily through the development of neoclassical realism in the second half of the 1990s (Putnam 1988; Buzan 1983; Ripsman et al. 2016).

On the other hand, scale in political geography most prevalently represents “a `vertical` series of nested levels, local, national, regional and global, that provides a convenient way of thinking about relationships...across different spatial extent” (Dahlman 2009, 190). As Okunev (2021, 21) puts it, “being physically in one place, we find ourselves in several layers of political space at the same time”. The importance of scale means that we can observe the effects and impacts of the same international problem on different scales, i.e., spatial levels, in order to gain a deeper understanding of the issue at hand. Within the textbook, Okunev takes the state as the primary unit and starting point and divides other levels into two large groups: the supranational and the subnational. The first consists of global, megaregional, transregional, macroregional, and mesoregional levels, and the second encompasses supraregional, regional, intraregional, subregional, and local levels. Additionally, he defines the two fundamental principles of spatial organization. Relying on the distinction between unitary and federalist states, Okunev applies the same concept to all levels of spatial organization. The unitary principle exists when a higher level of spatial organization determines and shapes a lower one, while the federalist principle means that the lower levels will form the higher one.

As mentioned previously, the second chapter, *Global Geopolitical Systems*, concerns the supranational levels of spatial organization. This chapter is not only the closest one to geopolitics but IR as well. Okunev examines them primarily from a geopolitical lens, employing the concept of geopolitical power systems. They could be antagonistic systems with competing subsystems (East vs. West) or civilization-centred systems, such as in the Clash of Civilizations model by Samuel Huntington (Huntington 1996). The concentric systems stem from the writings of classical authors of the Anglo-American school of geopolitics: Alfred Tayer Mahan, Halford Mackinder, and Nicholas Spykman, whose work focused on the development of concepts of Heartland, Lenaland, and Rimland (Mahan 1890; Mackinder 1904; Spykman 1944). Another type is the polar systems (unipolar, bipolar, and multipolar), based on the number of great powers. Regarding great powers, Okunev distinguishes between a consistent power, a rising power (an underachiever) that has the capabilities but whose status as a great power is not universally recognized, and a revisionist power (an overachiever), whose status as a great power is accepted but is founded on its now declining capabilities.

Okunev gives significant attention to the regional systems based on geographically defined macro- and mesoregions. Macroregions correspond to the continents of the world, while mesoregions “constitute stable historical and geographical groups of countries within a continent” (Okunev 2021, 63). If we



begin with the notion that the world is not a blank canvas, the focus is given to different regions and their specific characteristics that represent such a statement. Now, one might object that this chapter should be more extensive. But we should bear in mind that this is a textbook intended to introduce readers to key concepts and approaches to thinking about problems of focus in political geography. Without a firm understanding of the foundations, facts about how the world politically differs from place to place, as well as their impact on understanding international problems, become somewhat meaningless. Therefore, this decision by Okunev is understandable. The following chapter, *Integration Groups*, continues the focus on the supranational level. It tackles the various forms of integration in which states take part. Okunev explains the various stages of economic integration, from the preferential trade areas to the economic unions, as well as the other types of integration based on different policy areas, such as the visa-free zones, currency unions, and military alliances.

The fourth chapter, *States*, explores in detail the titular unit of political and geographical organisation and analysis. After tracing the evolution of the state from the Neolithic revolution, across city-states and both ancient and colonial empires, to the modern nation-state, the author describes the differences between some important and mutually similar concepts. He points out the contrast between the source and the holder of power. The source of power is essentially the sovereign, the actor vested with the right to govern, while the holder of power is “an institution that *de facto* administers state affairs” (Okunev 2021, 127). The different sources of power, namely the monarch or the people, lead to different forms of government: monarchies and republics, respectively. Criticizing the Montevideo criteria for statehood, consisting of a permanent population, defined territorial boundaries, a government, and the capacity to enter into relations with other states, Okunev argues that some states, such as the Vatican City and the Order of Malta, do not fulfil the first criterion, and points out that not a defined territory but a link to an ancestral territory is required. Thus, he comes to two necessary ingredients for statehood: territorial rootedness and sovereignty (internal and external). Combining territorial rootedness with two aspects of sovereignty, he proceeds to map various types of states, ranging from sovereign states, possessing all three characteristics, to quasi-states, which pose neither one.

As Okunev places the national scale at the centre of his work, one might argue that this chapter could come prior to the discussion of supranational regions. Not only are macro and mesoregions formed primarily by nation-states, but their integrations are the focus of the third chapter as well. But whether the same can be said for the two subsequent chapters (fifth and sixth) that focus on

the properties and composition of state territory is even more questionable. These chapters deal with the state's territorial position on the world map and the internal features of its territory, respectively. Okunev elaborates on how size, shape, neighbourhood, continentality, isolation, enclavity, and exclavity influence the position of a state. Now, the issue is this: can we talk about these features without first understanding the macro and mesoregions that states are positioned in? This question highlights the notion of scale, as discussed previously. A state is not just what defines it internally, but externally as well. Without an understanding of both internal and external elements, you cannot understand the property of a certain state. Therefore, the order can be left to the preference of the author as long as the logic is consistent. In the case of this textbook, it means that the chapters are organised on a descending scale – from global to local.

The seventh chapter focuses on those spatial wholes that are not part of any state. As Okunev (2021, 207) notes, "some areas that are not part of the sovereign territory also come under the state's jurisdiction". For example, the exclusive economic zone, the continental shelf, or occupied territories. They are called territories with a mixed regime and, together with international territories and internationalised territories, which are both subjects of the eponymous chapter nine, are part of the mixed level of spatial organization. Internationalized territories are the opposite of those with a mixed regime because they are part of the state's territory but are governed by an international authority. Examples are international straits, canals, lakes and rivers. On the other hand, the international territory belongs to all of humanity, and states cannot exercise specific authority in these areas. These include the high seas, the international seabed area, the international airspace, the outer space and celestial bodies, the Arctic and the Antarctic.

Chapter eight, *Dependent Territories*, analyses another specific level – the suzerain one. It encompasses territories between the state and the regional level. Their existence stems from colonialism and the subsequent opposing phenomenon – the decolonization process. While continental empires embarked on internal colonization of their vast land territories, the sea empires ventured to new undiscovered lands, which led to the creation of colonies outside of the metropolitan state and culminated in imperialism as the final stage of colonialism. The six waves of decolonization enabled the formation of modern non-self-governing territories that Okunev classifies into four categories based on a combination of two criteria: incorporation into the structure of the state and organization, defined as a degree of self-government. Chapter *Capitals and Centers* deals with these two important concepts. The author contrasts the

classical idea of a geographical centre, understood whether as a geometric median centre, a demographic centre of the population, or a political centre of the state's administrative hierarchy, with the notion of a pole of inaccessibility, which is "a location whose remoteness makes it the most challenging to reach" (Okunev 2021, 350). The chapter also discusses the functions of the capital: as a representation of a nation (the symbolic function), as the seat of government (the institutional function), and as one side of the centre-periphery dichotomy (the regional function).

*Borders and Cleavages* are the subjects of the next chapter. Okunev explains the three stages of boundary-making: delimitation, demarcation, and remarking, and examines the divided cities through which the state border runs. Writing on the social cleavages, he draws from the influential works of Lipset and Rokkan (1967). The second-to-last chapter, *Regions and Municipalities*, explores various forms of subnational spatial organization. The administrative divisions do not have any kind of political power and are only a representation of the central government at a lower level. On the other hand, autonomies exercise various degrees of authority and self-government. However, unitary and federal states can both have administrative divisions and/or autonomies, since the type of state depends on whether the power is granted top-down or bottom-up. The final chapter, *Spatial Identity*, is influenced by the discipline of critical geography and incorporates constructivist analysis of spatiality. In addition to objective, physical, absolute space, there is relative space, which is subjective and socially constructed through the functions and characteristics we assign to it. The first is connected to territorial identity, which rests upon the features of the terrain that define a group, such as the specific worldview of mountain dwellers based on the objective characteristics of their surroundings. The second influences the spatial identity, which is based on the relationship of a place with other locations. For example, Saint Petersburg is seen by its citizens as a window on Europe.

The world is not a blank canvas, and to understand it right, we must have a strong foothold in the discipline of political geography. Complex and multifaceted political processes and structures, as well as international problems that stem from them, must be tackled by recognizing the world's spatial differentiations. If we not only learn how to see and recognise the multiplicity of colours that the world canvas is made of, our understanding of international problems can only get better. Textbook *Political Geography* by Igor Okunev does precisely that. It is a thoroughly researched textbook that covers a vast number of concepts, terms, and phenomena, well-organised and logically divided into specific chapters, and enhanced by numerous illustrative examples that are particularly interesting for students of Russian politics and geography. It also provides numerous and

carefully curated recommendations for further reading, making this book a great teaching tool and a starting point for research into any aspect of the diverse ways spatiality influences politics. For IR scholars, the chapters on macro and mesoregions and those dealing with the state are particularly relevant. Our university curriculums should reflect on these reflections. Whether it is Political Geography, Regional Studies, or the Geopolitics of World Regions, future generations of researchers of international problems would benefit from being taught about and trained in the ways our world differs.

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# **BOOK REVIEW**





## **Contextualizing international relations' phenomena within democratic peace**

Gajić, Aleksandar. 2021. *Democracies do not wage war? And other views*. Belgrade: Institute of European Studies, pp. 215. ISBN 978-86-82057-80-2

Democratic Peace Theory (DPT) has seen a resurgence in academic thematization in recent years. Even though the first decade of this century brought scepticism on idea that political regime type greatly influences the adoption of foreign policy preferences, lately more and more attention has been paid to this theory. V-Dem<sup>1</sup>, one of the largest databases that measures political regime type changes around the world, reports that between 2011 and 2021, the world saw a massive surge of autocratization. Authoritarian activities, as well as the sudden decline of particular aspects of democracy, such as the quality of election procedures and the deliberative model of democracy, have caused a drop of liberal democracy during the last decade (V-Dem 2022). When producing a multiplicity of papers that add to IR analyses, the academic community deploys democracy as a significant variable and tool in an attempt to understand the complexity of contemporary international relations (Dujić 2015). Such methods, which allowed the degree of democracy to be reintroduced into academic work, reignited debates about the notion of democratic peace's use and its applications in empirical research.

The book „Democracies do not wage war“ published by the Institute of European Studies in Belgrade and written in Serbian language (original title: *Демократије не ратују? и други огледи*), is one such effort to bring the postulates of democratic peace closer to the domestic academic public and its application to the analysis of current problems in the system of international

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<sup>1</sup> This project is being implemented by the V-Dem Institute based within the University of Gothenburg, Sweden.

relations. It is 215 pages long and is divided into six thematic chapters, the first of which introduces the DPT, while the other five correspond to individual case studies.

The book commences with brief introduction of the DPT, its fundamental postulates, and the evolution of the theory. The author discusses the definitions of “war” and “democracy” as key DPT variables, as well as the history of wars between countries with democratic political regimes and DPT criticisms. He deploys five phenomena immanent to international relations that correspond to the book’s case studies.

As the book’s first case study, Gajić (2021) examines the disparity between the EU’s and Russian Federation’s divergent ideologies and geopolitical aims. He suggests that the EU is prone to normative power usage, while on the other hand, he describes the *realpolitik* concept deployed by the Russian Federation aiming to accomplish its foreign and security policy. His argument is that Russia sees EU efforts in the post-Soviet zone largely as a geopolitical struggle to expand its sphere of influence over its cultural and historical space, to its detriment, in an environment where no power vacuum can exist. Furthermore, he claims that Russian influence in this area should be developed in a preventative, progressive, and peaceful manner. The EU, on the other hand, perceives Russia’s actions as aggressive, resurgent Russian imperialism motivated by nostalgic historical feelings and illogical impulses.

The right to self-determination is discussed in the second case study from an international legal perspective. The author utilizes the academic concept of sovereignty as an entity that results in a violation of the right to self-determination. Besides, he addresses the “external” and “internal” components of the right to self-determination, as enumerates five key distinctions (mis)applications of this right in Kosovo and Metohija and Crimea. The first difference arises from the state-historical context, the second – legal-procedural, refers to the (un)use of the internal type of right to self-determination, the third is related to the legitimacy of the central government in relation to which the right to self-determination is required, the fourth – to different contexts in terms of the existence of external military aggression, while the fifth difference is related to the international legal status of the area whose population has “resorted” to the right to self-determination (Gajić 2021).

The book’s third case study examines small-country foreign and security policy strategies from Serbia’s standpoint. The author provides an outline of many alternatives on disposal to small nations in present circumstances after placing “small states” in the theoretical context of democratic peace. He then discusses how small countries could perform well in international system. Following the

existing theoretical explanations of the foreign policies of small countries, the author introduces the balancing strategy, bandwagoning strategy, proclamation of a neutrality, and the hedging strategy deployment. The majority of this chapter is devoted to an examination of Serbia's choice of strategy that it conducts in its foreign policy. According to Gajić, Serbia used the bandwagoning option to join the European Union throughout the first decade of this century. He furthermore states that Serbia's modern foreign and security policy is built on a strategy that is akin to hedging, namely the policy of "four pillars of foreign policy". He concludes that, in a typical situation, it is uncertain if Serbia uses strong bilateral ties with PR China as a hedging strategy in its EU relations, or whether these moves from official Belgrade signal a possible new era in Serbia's foreign and security policy paradigm.

Gajić (2021) includes human rights and military interventions in the fourth case study of this book. He begins by describing Costas Douzinas' approach to the ethics of so-called humanitarian operations. Westphalian sovereignty and human rights, according to this UK philosopher, are mutually independent variables in international politics (Douzinas 2009). The author discusses how Douzinas sees the interaction between legally legislative norms and informal ethics in international politics. In addition, the author portrays the objectification of human rights as a significant aspect of international relations. The author closes the chapter by addressing some early outstanding concerns that developed in this field of democratic peace considerations.

The final case study in the book examines the evolution of the OSCE. The author examines the actions of this global corporation in light of its evolutionary issues. Gajić cites the OSCE's massive bureaucratic apparatus and lack of in-depth attention to international security matters as two major criticisms of this international organization. He then referred to the Russian Federation's proposal for OSCE institutional reform as a security guarantor in the wider Eurasian region. Such proposal incorporated "Treaty on Security in Europe" made by the Russian Federation as an initiative for effective cooperation mechanisms that should provide solutions to security challenges and threats. The key regulation was contained in Article 2 of the Draft, which proposed that a state would not undertake, participate in or support actions or activities that significantly affect the security of another signatory state. The chapter concludes with discussion of future political and institutional issues facing the OSCE, as well as the OSCE's reaction to emerging security threats across Eurasia.

Even though the book "Democracies do not wage war" contributes to knowledge of liberal conceptions of international relations to some extent, it is not immune to both general and specific critiques. On a broad level, the book lacks a significant focus on what the theory of democratic peace is primarily concerned

with – peace studies and, more especially, armed conflicts. The author does not link a fundamental variable of democratic peace – armed conflicts – to any of the case studies' matrix, which does not correspond to standard practice in existing scholarly works. It remains unclear how the postulates of democratic peace are applied to problems that burden contemporary international relations such as secession, the choice of security strategies, the functioning of international organizations, and the issue of human rights. The monograph ends without a concluding chapter in which the findings would be systematized, and the author does not observe qualitative insights that might have emerged from case studies.

Despite these criticisms, this monograph has qualities in terms of incorporating some IR phenomena into the DPT matrix. The choice of five case studies is more than relevant in nowadays academic practice. Such security issues are treated in their contemporary outlook in the system of international relations through the prism of ethical, legal-institutional, and normative problems, which is another confirmation of adequate scientific work on this topic. In such an endeavor, the author favors a state-centric approach, which is why this book could be rather considered an *ode* to the monadic variation of the democratic peace theory. The fact that this is one of the first publications in the topic of DPT to be published in Serbian language adds to the overall quality of the book, as similar attempts that have been made in the domestic academic community so far are rather limited. Finally, academics and the general public who want to understand more about how international relations are intertwined with a range of bilateral and multilateral concerns can benefit from this book.

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In-text citation:

(Scott [1982] 2007)

(Future Weapons 2019)

(Tech Legend 2020)

### Social media

Reference list entry:

National Library of Australia. 2020. "National Library of Australia's Facebook Page". Facebook, August 1, 2020. <https://www.facebook.com/National.Library>.

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Trapara, Vladimir. 2018. "Victory or nil". *Unwrapping the Essence* (blog). May 29, 2018. <https://unwrappingtheessence.weebly.com/blog/pobeda-ili-nista>.

In-text citation:

(National Library of Australia 2020) (Kruszelnicki 2017)

(Trapara 2018)

### **Doctoral dissertation**

Reference list entry:

Rohrbach, Livia. 2020. *Beyond intractability? Territorial solutions to self-determination conflicts*. Doctoral dissertation. Department of Political Science, University of Copenhagen.

In-text citation:

(Rohrbach 2020)

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Reference list entry:

Oxford Library. 2012. "Library Strategy". Oxford Library. Accessed 3 June 2012. <http://www.ol.org/library/strategy.html>.

Google Maps. 2015. "The British Library, London, UK". *Google*. Accessed February 5, 2015. <https://www.google.com.au/maps/place/The+British+Library/@51.529972,-0.127676,17z/data=!3m1!4b1!4m2!3m1!1s0x48761b3b70171395:0x18905479de0fdb25>.

IIEP [Institute of International Politics and Economics]. n.d. "Mission". Accessed August 1, 2020. <https://www.diplomacy.bg.ac.rs/en/mission/>.

In-text citation:

(Oxford Library 2012)

(Google Maps 2015) (IIPE n.d.)

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Reference list entry:

Guzzini, Stefano. 2013. *Power, realism, and constructivism*. Abingdon and New York: Routledge.

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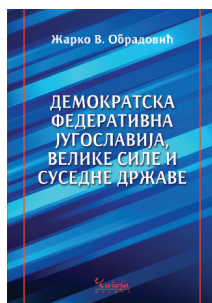
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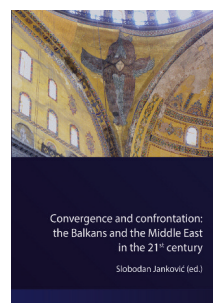
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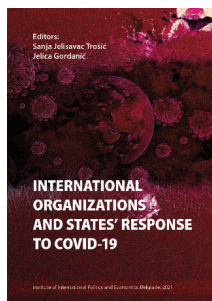
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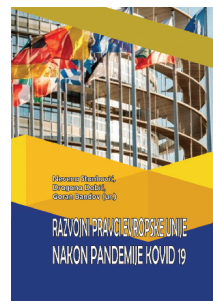
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