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## ***Journal of Political Science: Bulletin of Yerevan University***

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*Review by: Anna Aleksanyan*

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Human Security in Asia: Interrogating State, Society, and Policy, edited by Debasish Nandy, and Debnan Majee. Palgrave Macmillan, Singapore, 2024. XXI, 346 pp. <https://doi.org/10.1007/978-981-99-3585-7>

*Review by: Viktorya Melkonyan*

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Evaluating NATO Enlargement: From Cold War Victory to the Russia-Ukraine War, edited by James Goldgeier, and Joshua R. Itzkowitz Shifrinson. Palgrave Macmillan, Cham, 2023. XVII, 645 pp. <https://doi.org/10.1007/978-3-031-23364-7>

*Review by: Svetlana Jilavyan and Magda Arsenyan*

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## **In this Issue**

In the conditions of large-scale confrontations among nations, the tasks of complementarity of national, regional and global security throughout the world, as well as ensuring the quality of human life are becoming more complicated, have become significantly more urgent in connection with new challenges, dangers and threats that are becoming increasingly chaotic. Along with traditional dangers, threats and wars, political instability and environmental cataclysms, new dangers and threats have emerged in the form of interstate conflicts and undeclared wars, the spread of international terrorism and crime, a sharp deterioration in the environment, large-scale man-made accidents and disasters, climate change on our planet, depletion of natural resources, changes in the direction of demographic tasks, etc.

Ensuring a comprehensive multi-stage security system in connection with the emergence of new dangers and threats to its vital interests inherently presupposes a search for new approaches to the policy of ensuring global and national civilizational security. Globalization and Europeanization have strengthened the interconnection and interdependence of different regions, and thus scientific and technological progress has given rise to new global threats to the vital interests of nations, peoples, interstate organizations, CSOs, military alliances, etc.

The civilizational community and the UN have not yet found answers to these threats, since the task of ensuring complex multi-stage security in the conditions of modern global resilience urgently requires scientific understanding, political analysis of the tasks associated with ensuring global security in the broad sense and human security as the most important component of international, regional and national security. These approaches should focus, apparently, not on preventing local and world wars, the probability of which, of course, is not excluded, but on eliminating a set of smaller-scale military conflicts that cause significant damage to human sustainable development, and broad political, social and economic processes that directly or indirectly affect the resilience and vital interests of nations and countries.

Modern approaches to ensuring comprehensive security are less focused on military and political processes, but at the same time they focus on tasks related to the globalization of politics and economics, energy supplies, regional political instability, crime, terrorism, corruption, illegal drug trafficking, the spread of epidemics and diseases, etc.

In 'Intersections of Middle East crises and African Stability: assessing the impact of regional conflicts on peace and security in Sub-Saharan Africa', Abraham Ename Minko analyzes key internal and external political and social factors that affect many states in the Middle East and Africa. The article takes into account the fact that public authorities and societies in these countries are still facing the consequences of events that began in early 2011. It is quite obvious that the study of social and political crises in the Middle East and North Africa is not limited to these problems. An analysis of existing publications leads to the conclusion that there are many points of view on various aspects of the phenomenon of social and political crises in the Middle East and North Africa, and no unity is observed. Political transformations and a number of armed conflicts have created new risks and an increase in destructive factors in the

countries of the Middle East and Africa. The escalation of violence in certain areas of the Middle East and North Africa has led to the formation of new stable migration flows from the countries of the region, which has had the most serious impact on the EU Member States. At the same time, the course of the conflicts, according to the author, has led to a steady increase in the general level of extremist sentiments and has created a constant threat of the spread of radical ideas both in North Africa and the countries of the Middle East, and in Europe. According to the author, the need for a careful study of the causes, the immediate course of the processes that have occurred and the resulting consequences of the destabilizing events in North Africa and the Middle East is becoming obvious, in relation to both the countries being studied and the social and political situation at the regional and global levels. The article presents conclusions concerning theoretical and practical dimensions related to security challenges in Sub-Saharan Africa, as well as problems of analyzing the international situation related to this region of Africa as a whole. It should be noted that these conclusions include general theoretical works on policy, practice and possibilities for overcoming the crisis, and also highlight the challenges that hinder the stabilization of the situation in Sub-Saharan Africa.

In his article ‘A small state with growing influence: balancing Azerbaijan in global energy policy’, Suren Tadevosyan analyzes the growing competition between small states for markets, foreign investment, innovation, and new technologies, which is why the problem of small states’ competitiveness in the global economy has acquired particular importance. The article examines how Azerbaijan implements a policy of military aggression and ethnic cleansing against Armenia and Nagorno-Karabakh with the help of global energy policy. As an example, the author examines the 44-Day War and the militaristic mechanisms of ethnic cleansing of Nagorno-Karabakh, as well as the post-war situation in the South Caucasus. In many studies of global competitiveness, priority is given to large states, since they have a predominant impact on the development and functioning of the world economy. However, most of the states in the world have small areas and small populations, so they are the ones that experience the impact of globalization to the greatest extent. In this regard, the small states of the South Caucasus are especially interesting for study, which, despite fierce competition from large states, are trying to achieve a resilient level of economic development and well-being. The energy strategy of Azerbaijan aimed to attract foreign investment and modern technologies to the oil and gas industry. The principles of rational use of natural resources for the benefit of Azerbaijan and the use of oil revenues for the development of other sectors of the economy were the basis of the oil and gas policy of Azerbaijan. The author analyzes the features of Azerbaijan’s growing influence in the regional and international arena, its transformation from a regional leader into a global player. In just two decades of independence, Azerbaijan was able to turn its energy resources into a formula for its own success in rapprochement with global players.

In ‘Reimagining counterstruggle as a comprehensive theoretical framework for policy design and implementation: dimensions and factors of struggle and resistance’, Sergei Khatunov analyzes the political factors of counterstruggle, which are characterized, first of all, by the targeted use of various strategies to achieve political,

economic, military and other goals, which is inherent in public authorities, local government and society. The article notes that today's increased interest in the problem of counterstruggle is explained by a sharp increase in the scale of resistance among nations and countries due to the escalation of conflicts and the formation of a geopolitical information space. In modern conditions, the continuously developing information and communication technologies steadily increase the volume and speed of political counterstruggle. In this sense, the interaction of space, time and force within the framework of counterstruggle gives rise to trifunctionality. The possibilities of counterstruggle in the shortest possible time are improving, and the dependence of the effectiveness of political power on the ability to carry out confrontation in the foreign and domestic political spheres is becoming increasingly obvious. It should be noted that the experience of various states in using resources during wars and armed conflicts of the last decade allows us to say that the targeted use of various means is becoming one of the decisive factors, not only largely determining victory or defeat, but also capable of preventing open armed confrontation.

In the article 'Gridlocked streets or simply disinterested? Urban youth and unconventional political participation in Zimbabwe's Second Republic', Octavious Masunda analyzes the key prerequisites for the development of the Second Republic of Zimbabwe as a participant in global and regional integration processes, which faces the task of defining strategic foreign policy priorities. The article focuses on the conditions of transformation of economic and political systems, the crisis of value orientations, the creation of a system of political socialization and the formation of a new political culture of urban youth in the Second Republic of Zimbabwe is required. Political socialization ensures the preservation and transmission of political experience to new generations, the continuity of political institutions, norms, values, and the stability of the political system of Zimbabwe. For the Second Republic of Zimbabwe, it is important to raise the level of political culture of young people and urban youth, to expand their understanding of their place and role in the political process. The political crisis in Zimbabwe has had a significant impact on the situation in Southern Africa and has been discussed more than once at the highest level both in the African region and on a global scale. It has become a test of the commitment of African states and organizations to the declared principles of solidarity and mutual assistance. The task of uniting international efforts in order to implement a coordinated policy aimed at achieving sustainable development in the region retains its practical significance in the context of the severity of existing ethnic, migration, social, economic and political problems.

In the article 'Resilience of Civilianic Democracy in the face of challenges and gaps in European Integration: the political dimension of the Index of Civiliancy', Ashot Aleksanyan and Arusyak Aleksanyan discuss the main political challenges of the EaP countries in achieving democratic consolidation, as well as the Civiliancy Index methodology for measuring and ranking the EaP countries. The EaP countries are forced to respond to the numerous and alarming challenges of post-Soviet authoritarian countries, environmental and demographic, energy and resource, aggravated by the danger of proliferation of weapons of mass destruction, terrorism, etc. The regional scale and radical nature of the changes taking place in the post-Soviet EaP countries

allow the authors to suggest the application of the Civiarchy index and the formation of a new system of Europeanization. In parallel with these processes, the article revises many provisions and phenomena of the Europeanization dimension that characterize the factors of European political integration of the EaP countries. Including one of the basic foundations of this system is the democratic sovereignty of the EaP countries as one of the key actors of European political integration. The authors draw attention to the fact that post-war Armenia and the Russian-Ukrainian war since 2022 create a new situation in the EaP space, which, despite the heavy legacy of past discord and wars, is uniting around the EU, and the EU, in turn, is accepting more and more new members. In the context of confrontation between the global West and Russia, the EU represents a new pole influencing political processes not only on the continent, but also throughout the world. The EaP countries found themselves at the crossroads of various paths for further development, approaching the transition to a new stage of political integration with the EU. Therefore, the EU, its institutions and processes are of interest to the authors and most researchers who are concerned about the strategic integration and European future of the EaP countries. It should be taken into account that political integration within the EU is the only one of its kind, and, therefore, unique in terms of the practical implementation of the ideas that have worried the authors since 2013.

In her article 'Understanding the dynamics of transition of the women's movement in Armenia: challenges for democratic representation and increasing political influence', Olga Azatyan analyzes various dimensions of the women's movement, which is dictated by the fact that, firstly, the degree of formation of civil society in Armenia cannot be assessed without taking into account the participation of women, who make up more than half of the population of our country. Secondly, the formation of civil society, the growth of public activity of citizens, the initiative of their associations are clearly manifested in the women's movement, due to the fact that this social group is able to react sharply to the processes and changes taking place in society, protecting not only their own interests, but also defending the positions of the least protected social groups of Armenian society. Having emerged as a social and political movement for the equality of men and women, the women's movement has grown into a movement for democratic progress, and the tasks and goals that the movement's participants set for themselves concern not only women, they are significant for the development of the entire Armenian society. In this sense, the participation of the women's movement in the social process cannot be isolated, considered outside the political process, since, being a form of citizens' participation in public life, these organizations do not oppose themselves to the political system, do not seek to replace the institutional structures of representative democracy. Quite the contrary, they ensure the viability of the democratic political system, introducing new topics for discussion into the public sphere, taking into account the understanding of changing social interests and values. The creation of women's associations, their consolidation provides this social group with the opportunity to be heard when making important political decisions. The practical activities of women's public associations not only confirm the developed political concepts of civil society, but also show that the participation of broad strata of the population in social movements is, in essence, a manifestation of the democratization of Armenian society.

This volume of the journal includes three book reviews on peace education and religion, human security in Asia, and an assessment of NATO expansion from the Cold War to the war between Russia and Ukraine. These books analyze the factors of peace education, global and regional security, and migration processes that lead to the fact that modern society, despite the education of uniform values in certain spheres of life, is excessively diverse in matters of religion and human security.

The instability of the situation indicates the absence of models of solutions, the need for theoretical understanding of the accumulated experience, forecasting and preventing interreligious conflicts and contradictions. A significant part of the questions regarding the form and content of modern religious education in the EaP countries are formulated by modern political pedagogical practice, predetermined by the search for social consensus, achieving public accord. Like all modern peace education, the specific features of religious education cannot be understood based only on the local context, since the influence of international trends and events brings the local context into the global one. Religious education is present in European countries in various forms and for various social groups, but it is impossible to speak of a single European approach to this issue. The organization and content of religious education or teaching of knowledge about religion differ significantly from country to country.

In various chapters of these books, the authors examine subsequent catastrophes and wars, taking into account the accompanying new, previously non-existent dangers up to the threat of the destruction of humanity. Society and culture can no longer today be guided by old ideas, by traditional forms of self-defense. It is necessary to look into the eyes of new dangers that are generated by reason itself, it is necessary to seek means of self-defense in the conditions of military conflicts and wars. According to the authors of the chapters of these books, the undeclared war between Russia and Ukraine since 2022, political Europeanization requires some acceptable form of overcoming the principle of non-interference in the sovereign affairs of the EaP countries and is accompanied by the introduction of new mechanisms for ensuring peace in peacekeeping operations, as well as international sanctions against authoritarian regimes into world practice. Various approaches to a comprehensive multi-stage system of European security are highlighted, as well as to what resilient mechanisms can still complement European integration and Europeanization of the EaP countries.

*Editorial Board*

**INTERSECTIONS OF MIDDLE EAST CRISES AND AFRICAN STABILITY:  
ASSESSING THE IMPACT OF REGIONAL CONFLICTS ON PEACE AND  
SECURITY IN SUB-SAHARAN AFRICA**

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**Abstract**

This article examines regional crises and conflicts in the Middle East and Africa, assessing their impact on stability and security in a comparative perspective. It focuses on identifying common and specific elements in the structure of conflicts in the Middle East, such as the civil war in Syria and the Yemeni crisis, as they have far-reaching consequences beyond their immediate regions, significantly affecting the political, economic and security dynamics of sub-Saharan Africa. These crises contribute to refugee flows, arms trafficking, and the proliferation of terrorism, exacerbating instability in already fragile African states. The spillover effects challenge the capacities of African regional organizations like the African Union and ECOWAS to maintain peace and security. Additionally, the involvement of external powers, including the U.S., Russia, and China, in Middle Eastern conflicts further complicates the landscape, influencing African responses and policies. African nations face the dual challenge of addressing internal vulnerabilities while mitigating the adverse impacts of Middle Eastern conflicts. Diplomatic and economic strategies are crucial for enhancing resilience and stability. Understanding the intersections of these regional crises is essential for developing comprehensive policy frameworks that address the root causes and consequences of such conflicts. By exploring these interconnections, it becomes possible to identify effective measures for bolstering African stability in the face of external pressures and fostering a more secure and prosperous future for the continent.

**Keywords:** Middle East crises, African stability, refugee flows, arms trafficking, terrorism, humanitarian crisis, resilience, political instability.

**Introduction**

The impact of Middle Eastern conflicts on Sub-Saharan Africa reveals a complex interplay of regional dynamics that extends well beyond the immediate geographic

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boundaries of the conflicts themselves. As conflicts like the Syrian Civil War and the Yemeni Crisis continue to destabilize the Middle East, their reverberations are increasingly felt in Africa, manifesting in various forms of instability and disruption. Understanding these interactions is crucial for devising effective policy responses and enhancing regional stability.

The Syrian Civil War, which began in 2011, has generated a massive outflow of refugees, with millions fleeing the violence and destruction. This displacement crisis has not only affected neighboring countries like Turkey and Lebanon but also extended to Africa. For instance, in countries such as Egypt and Sudan, the arrival of Syrian refugees has placed additional strain on already limited resources and infrastructure. The influx has led to increased competition for jobs, education, and health services, exacerbating socio-economic tensions and sometimes fueling local conflicts. In Sudan, where the government has struggled with internal conflicts and economic difficulties, the addition of refugees has further strained its fragile stability (Hatem 2009).

Similarly, the Yemeni Crisis has had far-reaching implications for African nations, particularly in the Horn of Africa. The ongoing conflict and humanitarian disaster in Yemen have led to an increase in piracy and arms trafficking in the Red Sea and Gulf of Aden, which affects countries such as Somalia and Djibouti. The proliferation of weapons has fueled local conflicts and empowered militant groups, complicating efforts to restore peace and stability in these regions. For example, the rise of Al-Shabaab in Somalia has been linked to both regional arms trafficking and the broader instability in the Horn of Africa, illustrating how Middle Eastern conflicts contribute to regional security challenges.

The broader implications of Middle Eastern conflicts also extend to economic and political dimensions. African states are often caught in the crossfire of geopolitical interests and power plays involving external actors who are also involved in Middle Eastern conflicts (Moran 2014). The involvement of powers such as the United States, Russia, and China in Middle Eastern crises has indirect effects on African stability, as these external influences can alter regional alliances and economic conditions. For example, the shifting dynamics in Middle Eastern oil markets and trade routes can affect African economies, particularly those that are heavily reliant on trade with the Middle East (Somerville 2009).

Regional organizations like the African Union (AU) and the Economic Community of West African States (ECOWAS) are tasked with addressing these spillover effects (Henry 2021). However, their capacity to respond is often limited by resource constraints and political challenges. The AU's efforts to mediate conflicts and support peacekeeping missions can be undermined by the complexities introduced by external conflicts, highlighting the need for enhanced international cooperation and support to bolster regional stability.

## **Impact of Refugee Flows**

The impact of refugee flows from Middle Eastern conflicts on Sub-Saharan Africa is a pressing issue that underscores the complex interactions between regional crises and their far-reaching effects (Kelley and Oded 1988). The ongoing turmoil in the Middle

East, exemplified by the Syrian Civil War and the Yemeni Crisis, has led to significant refugee movements that extend beyond the immediate region, profoundly affecting various aspects of life in African countries (Wise 2009, 13-26, 129-148).

One of the most tangible impacts of these refugee flows is the strain they place on the resources and infrastructure of host countries. For instance, Lebanon and Jordan have been heavily impacted by the influx of Syrian refugees, but the ripple effects are also felt in Africa. Countries such as Egypt and Sudan, which have seen an increase in refugee populations, face severe pressure on their already limited resources (Gross 2020). In Egypt, the arrival of Syrian refugees has compounded existing socio-economic challenges, including high unemployment rates and strained public services (Cook 2020; Kwarten 2020). This influx has led to increased competition for jobs, housing, and healthcare, exacerbating social tensions and contributing to local instability. In Sudan, where the government is grappling with internal conflicts and economic difficulties, the addition of refugees has further stressed an already fragile system, making it harder to provide adequate support and services (Fiseha 2024).

The strain on infrastructure is not limited to basic services but extends to economic sectors as well. In regions such as East Africa, the presence of refugees has impacted local markets and economies (Betts, Omata and Bloom 2017). For example, in Uganda, which hosts a significant number of South Sudanese and Congolese refugees, the sudden increase in population has put additional pressure on local food supplies and housing. While Uganda has been praised for its relatively open refugee policy, the rapid population growth in refugee-hosting areas has led to inflation and increased competition for resources, affecting both refugees and residents. For example, in the Bidibidi settlement, one of the largest refugee camps in Uganda, the local economy has seen a boost in trade and small businesses. However, the influx of refugees has also led to inflation and increased competition for jobs and resources, impacting both refugees and residents (Shih et al. 1991).

In Kenya, the Dadaab refugee camp, which hosts a significant number of Somali refugees, has faced severe challenges related to resource allocation (Opi 2024). The camp's growing population has led to the scarcity of essential resources like water, food, and sanitation facilities. This has not only impacted the quality of life for refugees but has also strained the local communities surrounding the camp. The competition for limited resources has heightened tensions and occasionally led to conflicts between refugees and residents (Nyadera, Islam and Agwanda 2024, 133-169). The situation has been further complicated by the influx of refugees during periods of heightened conflict in Somalia, which has intensified the pressures on local infrastructure and services (Nyadera, Islam and Agwanda 2024, 113-131; Shilling 1996).

Security concerns also arise from large-scale refugee movements. The refugee camps in border regions can become hubs for smuggling and trafficking activities. In the Lake Chad Basin, where the conflict with Boko Haram has displaced millions, the refugee crisis has been linked to the proliferation of arms and insurgent activities. The porous borders and large refugee camps in countries like Niger and Chad create conditions conducive to the movement of armed groups and the trafficking of weapons, complicating security efforts in these regions (Kavuro 2023; Ní Ghráinne 2014).

Social integration issues are another significant challenge. Refugee communities often face difficulties in integrating into host societies, leading to social friction. In South Africa, where there are substantial numbers of refugees from various conflicts, including those from the Middle East, there have been reports of xenophobic attacks against refugees. These tensions are exacerbated by competition for employment and resources, creating an environment of distrust and hostility.

Furthermore, the refugee crisis can strain humanitarian aid and development efforts. In places like Mozambique, where refugees from various conflicts have sought refuge, international aid agencies struggle to meet the growing needs (Cardoletti-Carroll 2016). The increased demand for humanitarian assistance puts additional pressure on aid organizations, which are often already working with limited resources (Faist, Gehring and Schultz 2023). This can lead to gaps in aid provision and difficulties in addressing the needs of both refugees and local populations effectively.

### **Arms Trafficking and Proliferation**

Arms trafficking and proliferation have become critical issues in the context of Middle Eastern conflicts, with significant repercussions for Sub-Saharan Africa (Brauch 2024; Beck 2004). The turbulence in the Middle East, driven by conflicts such as the Syrian Civil War and the Yemeni Crisis, has fueled a proliferation of weapons that adversely impact African regions (Fernández and Sabrine 2024; Foyth 2023). This dynamic highlights the complex relationship between global conflicts and regional security.

The Syrian Civil War, which has drawn in various international actors and factions, has been a significant source of arms proliferation. The conflict has led to the accumulation and distribution of a vast array of weaponry, much of which has flowed into Africa. For instance, reports indicate that weapons from Syria have ended up in conflict zones across Africa, including Somalia and South Sudan. In Somalia, the presence of advanced weaponry has exacerbated the ongoing conflict involving the militant group Al-Shabaab (Mwangi 2023). The influx of these weapons has intensified the group's capabilities, making it more challenging for peacekeeping forces and local governments to stabilize the region. The sophisticated arms, including rocket-propelled grenades and automatic rifles, have contributed to the prolongation and intensification of violence, undermining peacebuilding efforts (Besenyő and Sinkó 2024; Matusitz and Wesley 2024).

Similarly, the Yemeni Crisis has had a notable impact on arms trafficking in the Horn of Africa (Cherubini 2023; Juss 2013). The conflict in Yemen has created a chaotic environment in which arms smuggling thrives, affecting neighboring countries such as Somalia and Djibouti. The Gulf of Aden and the Red Sea, strategic maritime routes, have become transit points for smuggling operations (Zaccara and dos Santos Gonçalves 2021). For example, weapons from Yemen have been intercepted by regional authorities in Somalia, contributing to the destabilization of the country. The proliferation of these arms has empowered various militia groups and exacerbated the already volatile security situation, making it more difficult for humanitarian and developmental efforts to proceed effectively (Betts, Omata and Bloom 2017).

The presence of small arms and light weapons from the Middle East has also influenced conflicts in the Lake Chad Basin region (Tella 2018). The Boko Haram insurgency, which affects Nigeria, Niger, Chad, and Cameroon, has been significantly bolstered by weapons sourced from the Middle East (Solomon 2024; Fatile and Ejalonibu 2024). The insurgent group has gained access to a range of weaponry that has enhanced its operational capacity and extended its reach. This influx of arms has complicated efforts to combat the insurgency and stabilize the region, leading to prolonged instability and suffering.

The impact of arms trafficking extends beyond direct conflict zones, affecting regional security and development. In West Africa, for instance, arms trafficking has contributed to a rise in violent crime and insecurity. Countries like Mali and Burkina Faso, which have experienced instability due to local and regional conflicts, also face challenges related to the proliferation of weapons (Halloway 2023; Tofangsaz 2015). The availability of firearms has facilitated organized crime and insurgent activities, further straining already fragile security systems and undermining development efforts (Khanyile 2024). The illicit trade in weapons has led to an increase in attacks on civilians and humanitarian workers, further complicating efforts to provide aid and support to vulnerable populations.

Furthermore, the proliferation of weapons has a broader impact on humanitarian efforts and community safety (Mokhorova, Demidov and Chernozemova 2024; Wang 2020). The widespread availability of arms complicates disarmament initiatives and peacebuilding processes. In countries like the Central African Republic, where armed groups frequently engage in conflict, the presence of illicit weapons hampers efforts to establish peace and security. The inability to control and regulate arms flows makes it difficult for peacekeepers and local authorities to enforce ceasefires and disarmament agreements effectively (Wang, Cui and He 2022).

The arms trafficking and proliferation driven by Middle Eastern conflicts have significant and far-reaching impacts on Sub-Saharan Africa (Busingye 2022; Carey 2002). The influx of weapons into regions such as Somalia, South Sudan, the Horn of Africa, and West Africa has intensified local conflicts, fueled insurgent activities, and undermined regional security and development efforts. Addressing these issues requires coordinated international and regional strategies to control arms flows, enhance border security, and support disarmament initiatives. Effective measures to combat arms trafficking and proliferation are essential for restoring stability and promoting peace in affected areas.

## **Terrorism and Extremism**

The interplay between Middle Eastern conflicts and the rise of terrorism and extremism in Sub-Saharan Africa underscores a significant and troubling dynamic (Naudé 2021; Horn 2018). The turbulence in the Middle East, marked by conflicts such as the Syrian Civil War and the Yemeni Crisis, has not only destabilized the region but also contributed to the spread of extremist ideologies and terrorist activities across Africa. This phenomenon highlights the complex connections between regional conflicts and global security threats.

The Syrian Civil War has been particularly influential in the proliferation of extremist ideologies. The conflict, which has seen the involvement of various militant groups, including ISIS, has created a breeding ground for extremism. The collapse of state structures and the chaos of the war have allowed ISIS to establish a presence in the region, and its influence has extended beyond Syria's borders. In Africa, the rise of extremist groups such as Boko Haram in Nigeria has been linked to the ideologies and tactics of ISIS. Boko Haram, which initially focused on local grievances, has increasingly adopted ISIS-style tactics, including suicide bombings and mass kidnappings (Sakariyau and Bello 2024; Makinda 2006). The group's shift towards more extreme methods can be traced to the influence of Middle Eastern terrorist organizations, which have provided both ideological inspiration and practical methods of violence.

Similarly, the Yemeni Crisis has contributed to the spread of extremism in the Horn of Africa. The conflict in Yemen has created a chaotic environment that has been exploited by extremist groups. Al-Qaeda in the Arabian Peninsula (AQAP), which has operated from Yemen, has used the instability to recruit and train militants. The group's influence has spread to neighboring countries such as Somalia, where Al-Shabaab, an Islamist militant group, has benefited from AQAP's connections. Al-Shabaab has adopted more radical tactics and has conducted high-profile attacks in Somalia and neighboring Kenya, including the 2013 Westgate Mall attack in Nairobi. The links between AQAP and Al-Shabaab illustrate how conflicts in the Middle East can exacerbate and fuel extremist activities in Africa (Mwangi 2023; Gaibulloev and Sandler 2019).

The spillover of extremism from the Middle East has also impacted the Lake Chad Basin region. Boko Haram's insurgency, fueled by weapons and ideological influence from the Middle East, has caused severe instability in Nigeria, Niger, Chad, and Cameroon (Mutanda 2017). The group's activities have included attacks on military and civilian targets, abductions, and the imposition of extremist interpretations of Islamic law. The extremist violence in the Lake Chad Basin has created a humanitarian crisis, with millions displaced and communities living in constant fear. The regional response to Boko Haram's insurgency has been complicated by the group's ability to operate across borders and by the influx of extremist tactics and ideologies from the Middle East. The spread of terrorism and extremism in Africa is also evident in the Sahel region, where groups such as AQIM (Al-Qaeda in the Islamic Maghreb) and its affiliates have gained ground. The instability in Mali and other Sahelian countries has been exacerbated by the influence of Middle Eastern extremist groups. AQIM has established networks in the Sahel, leveraging the region's porous borders and weak governance to operate and expand. The group's activities, including kidnappings for ransom and attacks on security forces, reflect the broader impact of Middle Eastern conflicts on regional security dynamics (Hoffman 2022; Li et al. 2021).

The rise of extremism has profound implications for regional stability and humanitarian efforts. In countries like Burkina Faso and Niger, where extremist groups have gained a foothold, the impact on local communities has been severe. The presence of extremist groups has led to increased violence, displacement, and a strain on

humanitarian resources. The local populations face frequent attacks and live under constant threat, complicating efforts to deliver aid and support (Solomon 2015).

The spread of terrorism and extremism from Middle Eastern conflicts to Sub-Saharan Africa demonstrates the interconnected nature of global security challenges. The influence of Middle Eastern extremist ideologies and tactics has significantly impacted African regions, contributing to the rise of militant groups and exacerbating regional instability. Addressing these issues requires a comprehensive approach that includes counterterrorism efforts, regional cooperation, and international support to mitigate the impacts of extremism and promote stability and security in affected areas.

### **Responses of African Regional Organizations**

The responses of African regional organizations to the impacts of Middle Eastern conflicts reflect a range of strategies and challenges as they work to address the complex issues arising from these external crises. Organizations such as the African Union (AU) and the Economic Community of West African States (ECOWAS) have been at the forefront of efforts to manage the consequences of regional instability, including the influx of refugees, arms proliferation, and the rise of terrorism and extremism (Frimpong 2023; Engel 2014). Analyzing their responses reveals both their achievements and limitations in tackling these challenges.

The AU, as the premier continental organization, has undertaken several initiatives to address the multifaceted impacts of conflicts in the Middle East. One notable example is the AU's engagement in peacekeeping missions (Kilonzo and Chitando 2023). The AU has been actively involved in peacekeeping operations in countries such as Somalia, where the African Union Mission in Somalia (AMISOM) has been instrumental in combating the militant group Al-Shabaab. AMISOM's mission has been critical in stabilizing Somalia and reducing the group's control over territory. However, the mission has faced challenges, including logistical difficulties and the need for more substantial support from international partners. The AU's efforts are constrained by limited resources and political will among member states, which can impact the effectiveness of its operations (Glas 2018).

ECOWAS, a regional organization focused on West Africa, has also played a significant role in addressing the repercussions of conflicts in the Middle East. ECOWAS has been involved in various peacekeeping and stabilization efforts within the region (Frimpong 2023). For example, ECOWAS has taken steps to address the security challenges posed by extremist groups in the Sahel region. The organization has coordinated with international partners to support regional security initiatives, such as the Sahel Alliance, which aims to combat terrorism and promote development in affected areas. Despite these efforts, ECOWAS faces difficulties in managing the complex security dynamics in the Sahel, where extremist groups exploit regional instability and weak governance.

In addition to peacekeeping and security measures, African regional organizations have also been engaged in addressing the humanitarian impacts of Middle Eastern conflicts (Gardachew 2020). The AU and ECOWAS have both worked to coordinate responses to the refugee crisis resulting from regional conflicts. For instance, the AU

has facilitated discussions on managing refugee flows and improving humanitarian assistance. The AU's efforts include advocating for international support and resources to assist countries hosting large numbers of refugees. However, the effectiveness of these initiatives is often limited by the lack of sufficient funding and the challenge of coordinating responses across multiple countries with varying capacities (Bappah 2022; Omorogbe 2011).

Another significant aspect of the AU's response involves addressing the spread of arms trafficking and related security concerns. The AU has developed frameworks such as the African Peace and Security Architecture (APSA) to address issues related to arms proliferation and conflict prevention. The APSA framework includes mechanisms for early warning, conflict mediation, and disarmament initiatives. However, the implementation of these frameworks is frequently hampered by inadequate funding, logistical challenges, and the complexities of regional politics (Akech 2020).

The responses of African regional organizations also highlight the need for increased international support and cooperation. The AU and ECOWAS often rely on partnerships with international organizations, such as the United Nations and the European Union, to bolster their efforts (Nzau 2022; Hammed 2015). For example, the AU's AMISOM mission in Somalia is supported by funding and logistical assistance from international partners. Similarly, ECOWAS's initiatives in the Sahel benefit from collaboration with the French-led Operation Barkhane and other international actors. These partnerships are crucial for enhancing the capacity of African regional organizations to address the impacts of Middle Eastern conflicts. However, reliance on external support can also create dependencies and challenges in ensuring the sustainability of interventions (Nzau 2022).

The responses of African regional organizations to the impacts of Middle Eastern conflicts illustrate a range of efforts and challenges. While organizations like the AU and ECOWAS have made significant strides in addressing security, humanitarian, and arms trafficking issues, their effectiveness is often constrained by resource limitations, logistical difficulties, and the need for coordinated international support. Addressing these challenges requires continued efforts to strengthen regional capacities, enhance international cooperation, and develop comprehensive strategies to mitigate the impacts of external conflicts on African stability (Adeyeye 2024; Burke 2017).

## **Economic Impact and Development Disruptions**

The economic impact and development disruptions resulting from Middle Eastern conflicts have profound consequences for Sub-Saharan Africa, affecting trade, investment, and overall economic stability. These disruptions are intricately linked to global economic systems and have significant implications for African countries that are already facing economic challenges (Emupenne and Small 2024).

One prominent example of economic disruption is the fluctuation in global oil prices caused by conflicts in the Middle East. The volatility in oil-producing regions such as Iraq and Libya directly impacts African economies, particularly those that are heavily reliant on oil imports. For instance, many countries in Sub-Saharan Africa, including landlocked nations, rely on oil imports for energy needs and transportation

(Juška 2024; Kaaba and Fagbayibo 2019). When conflicts in the Middle East disrupt oil production or create uncertainties in global oil markets, these countries face increased fuel costs, which can lead to inflation and higher transportation expenses. This, in turn, affects the cost of goods and services, exacerbating economic pressures on already vulnerable populations.

Additionally, the disruption of trade routes due to Middle Eastern conflicts impacts African economies. The Suez Canal, a crucial maritime route that connects Europe to Asia and the Middle East, is vital for global trade, including the import and export activities of African nations. Conflicts in the Middle East can lead to disruptions in this trade route, causing delays and increased shipping costs. For example, the 2021 Ever Given ship blockage in the Suez Canal, though not directly linked to conflict, highlighted the vulnerabilities in global trade routes. Such disruptions can lead to increased costs for importing goods and exporting African commodities, impacting the economic stability of countries that depend on these routes for trade (Ani 2019).

Investment flows are another area significantly affected by Middle Eastern conflicts. Conflicts and instability in the Middle East can lead to a reduction in foreign direct investment (FDI) in Sub-Saharan Africa. Investors, concerned about the risks associated with regional instability, may redirect their investments to more stable regions. For example, the unrest in Libya and the broader Middle Eastern region has created an environment of uncertainty that can deter international investors from entering African markets. This lack of investment can stifle economic growth, limit job creation, and hinder development projects in sectors such as infrastructure, healthcare, and education.

The economic disruptions also extend to the impact on tourism and local businesses. Many African countries rely on tourism as a significant source of revenue. The instability caused by conflicts in the Middle East can affect global travel patterns and reduce the number of tourists visiting Africa. For instance, during periods of heightened conflict in the Middle East, travelers may avoid long-haul trips or travel to regions perceived as safer. This decline in tourism can negatively impact local businesses, including hotels, restaurants, and tour operators, leading to job losses and reduced income for communities that depend on tourism.

Moreover, economic disruptions from Middle Eastern conflicts can exacerbate existing socio-economic challenges in Africa. In countries like South Sudan and the Central African Republic, where conflict has already led to economic instability, additional disruptions from external conflicts can further hinder recovery efforts. The combination of internal and external economic pressures can create a vicious cycle of poverty and instability, making it more difficult for these countries to achieve sustainable development and economic growth (Chakanyuka 2020).

The economic impact and development disruptions resulting from Middle Eastern conflicts have far-reaching consequences for Sub-Saharan Africa. The fluctuations in oil prices, disruptions in trade routes, reductions in investment flows, and declines in tourism all contribute to economic instability and hinder development efforts. Addressing these challenges requires a comprehensive approach that includes diversifying economies, strengthening regional trade and investment partnerships, and improving resilience to external economic shocks. By implementing these strategies,

African countries can better navigate the complexities of global economic disruptions and work towards sustainable development and stability.

### **Impact on Governance and Rule of Law**

The impact of Middle Eastern conflicts on governance and the rule of law in Sub-Saharan Africa illustrates a complex interplay between external instability and internal state dynamics (Akinola and Liaga 2023; Vandeginste 2013). These conflicts often exacerbate existing weaknesses in governance structures and legal frameworks, leading to significant challenges in maintaining order and implementing effective governance.

One of the most striking examples of how external conflicts affect governance in Sub-Saharan Africa is the situation in Somalia. The prolonged conflict in the Middle East, including the rise of extremist groups such as ISIS, has had ripple effects on the Horn of Africa. Somalia, already grappling with its own internal strife and weak governance, has been significantly impacted by the spread of extremist ideologies and the proliferation of arms. The presence of Al-Shabaab, an extremist group with links to Al-Qaeda, reflects how regional conflicts contribute to the erosion of state authority and the rule of law. The group's ability to conduct high-profile attacks, such as the 2017 Mogadishu bombing, demonstrates the challenges faced by Somali authorities in maintaining security and governance in the face of external influences (Ssenyonjo 2013).

In West Africa, the effects of Middle Eastern conflicts have similarly impacted governance structures. The insurgency of Boko Haram in Nigeria, which has been influenced by extremist ideologies from the Middle East, highlights the strain on local governance. The Nigerian government's struggle to control the insurgency has been exacerbated by the group's sophisticated tactics and the influx of arms and resources linked to broader regional conflicts. The governance challenges are evident in the difficulty of providing basic services and maintaining law and order in areas affected by Boko Haram's insurgency. The resulting humanitarian crisis, with millions displaced and local economies disrupted, underscores the impact of external conflicts on state capacity and governance (Ikpat 2023; Magliveras and Naldi 2013).

The situation in Libya further illustrates how conflicts in the Middle East can undermine governance and rule of law in Africa. The collapse of the Libyan government following the 2011 NATO intervention, coupled with the ongoing instability and factional fighting, has created a power vacuum that has affected neighboring countries. For example, the influx of weapons and fighters from Libya has contributed to the destabilization of the Sahel region. In countries such as Mali and Niger, the presence of armed groups and the proliferation of illicit arms have undermined efforts to establish effective governance and rule of law (Gwatiwa 2022; Pergantis 2016). The challenges faced by these countries include managing internal security threats and rebuilding state institutions in the context of external influences and destabilizing factors.

The economic impact of Middle Eastern conflicts also contributes to governance challenges in Sub-Saharan Africa. The strain on public resources and infrastructure caused by external economic disruptions can weaken state capacity and governance.

For instance, in the Central African Republic, where conflict and instability have long plagued the country, external economic shocks related to Middle Eastern conflicts have exacerbated the challenges faced by the government. The inability to effectively manage resources and provide essential services undermines the rule of law and governance, leading to a cycle of instability and weakened state authority.

Addressing these governance and rule of law challenges requires a multifaceted approach. Strengthening state institutions and legal frameworks is essential for enhancing resilience and improving governance in the face of external pressures. This includes investing in the capacity of local authorities, promoting transparency and accountability, and fostering effective rule-of-law mechanisms. Additionally, regional and international support is crucial in helping affected countries build and sustain effective governance structures. Collaborations with international organizations and partners can provide the necessary resources and expertise to support governance reforms and legal frameworks.

The impact of Middle Eastern conflicts on governance and the rule of law in Sub-Saharan Africa is profound and multifaceted. The erosion of state authority, the weakening of governance structures, and the undermining of legal frameworks illustrate the complex challenges faced by affected countries. Addressing these issues requires strengthening local governance, improving state capacity, and enhancing international support to build resilience and ensure effective governance and rule of law in the face of external conflicts.

## **Role of External Powers**

The role of external powers in the context of Middle Eastern conflicts and their impact on Sub-Saharan Africa is both significant and multifaceted. External actors, including global and regional powers, influence African stability through various means such as military interventions, diplomatic efforts, and economic aid. Their involvement shapes the dynamics of conflicts and has profound implications for the security and development of affected regions in Africa (Odobo, Alumona and Erameh 2024; Akuffo 2011).

One of the most prominent external actors in Middle Eastern conflicts is the United States. The U.S. has been deeply involved in conflicts such as the Syrian Civil War, providing military support to various factions and conducting airstrikes against terrorist groups like ISIS. This involvement has had indirect effects on Africa (Kostelyanets 2023; Cimiotta 2017). For instance, the fight against ISIS has led to increased efforts in counterterrorism globally, including in Africa. The U.S. has partnered with African nations to combat groups influenced by ISIS, such as Boko Haram in Nigeria and Al-Shabaab in Somalia. The U.S. has provided military aid, training, and intelligence support to help African countries address these threats. While this support has bolstered local counter-terrorism capabilities, it has also introduced challenges, including the need for effective coordination between international and local forces and concerns about the long-term sustainability of these interventions.

European powers, particularly France and the United Kingdom, also play a significant role in addressing the impacts of Middle Eastern conflicts on Africa (Pisouli

and Hain 2017). France, for example, has been actively involved in military operations in the Sahel region through Operation Barkhane, which aims to combat extremist groups and stabilize the area. This operation is part of France's broader strategy to address the security challenges arising from Middle Eastern conflicts and their spillover into Africa. The presence of French forces has been crucial in supporting regional governments and countering extremist activities. However, France's involvement has faced criticism and challenges, including allegations of neocolonialism and concerns about the effectiveness of military solutions in addressing the underlying causes of extremism.

The United Nations is another key external actor, playing a vital role in addressing the humanitarian and security impacts of Middle Eastern conflicts on Africa (Desmidt and Lamont 2019). The UN has been involved in various ways, including through peacekeeping missions, humanitarian aid, and diplomatic efforts. For example, the UN's Office for the Coordination of Humanitarian Affairs (OCHA) provides crucial assistance to refugees and displaced persons in African countries affected by conflicts in the Middle East. Additionally, the UN has supported peacekeeping missions in areas such as South Sudan and the Central African Republic, where the destabilizing effects of regional conflicts have been felt. Despite these efforts, the UN's ability to respond effectively is often constrained by funding shortages, bureaucratic challenges, and the complexities of coordinating with multiple stakeholders (Spalek 2012).

Regional powers such as Saudi Arabia and Iran have also had a significant impact on African security dynamics. Saudi Arabia, for instance, has been involved in supporting various factions and groups across the Middle East, with implications for African security. The kingdom's support for anti-Houthi factions in Yemen has contributed to the broader regional instability, which has indirectly affected neighboring African countries. Iran, similarly, has been linked to various militant groups in the Middle East, and its influence has extended to African regions (Mafumbo, Nakaiza and Sekito 2024). The presence of Iranian-supported groups in the Horn of Africa, such as those aligned with the Houthis in Yemen, has implications for regional security and stability.

China, with its growing presence in Africa, also plays a role in the broader context of Middle Eastern conflicts. China's involvement is primarily economic, with substantial investments in infrastructure and resource extraction across Africa. While China's engagement in Africa is largely focused on economic development, its role also intersects with security dynamics. For instance, Chinese investments in unstable regions may be affected by the broader security context, including the impacts of Middle Eastern conflicts. China's approach emphasizes non-intervention and respect for national sovereignty, which influences its responses to regional security challenges.

The role of external powers in the context of Middle Eastern conflicts and their impact on Sub-Saharan Africa is complex and multifaceted. The involvement of global and regional powers shapes the dynamics of conflicts and affects African stability through military, diplomatic, and economic means. While external support can enhance local capabilities and provide critical assistance, it also introduces challenges related to coordination, sustainability, and the broader implications of foreign interventions. Addressing these issues requires a nuanced approach that considers the diverse

interests and impacts of external actors while promoting effective collaboration and support for regional stability and development.

## Policy Recommendations for Enhancing Resilience

Addressing the challenges posed by Middle Eastern conflicts on Sub-Saharan Africa necessitates robust policy recommendations to enhance resilience and stability in affected regions. These recommendations should encompass a range of strategies aimed at strengthening local capacities, improving regional cooperation, and fostering international support. Each of these strategies plays a crucial role in building resilience against the complex impacts of external conflicts.

One key policy recommendation is the enhancement of regional cooperation and integration. Effective regional cooperation can significantly improve the ability of African nations to address cross-border challenges, such as arms trafficking and extremist movements. For example, the establishment of the Multinational Joint Task Force (MNJTF) by the Lake Chad Basin countries—Nigeria, Niger, Chad, and Cameroon—has been instrumental in combating Boko Haram. The MNJTF's collaborative approach has allowed these countries to pool resources, share intelligence, and conduct joint operations. Expanding such regional frameworks and encouraging greater cooperation among African nations can enhance collective security and improve responses to threats that transcend national borders.

Strengthening the capacity of local governments and institutions is another critical recommendation. Local governments are often on the front lines of dealing with the direct impacts of conflicts, such as managing refugee influxes and responding to humanitarian needs. In Uganda, for instance, the government has been praised for its relatively open and supportive policy towards refugees, which has involved significant local and international coordination. However, the capacity of local authorities to manage these challenges is frequently limited by inadequate resources and infrastructure. Investing in the development of local institutions, including enhancing their capacity for crisis management and service delivery, is essential for building resilience (Maseno and Chitando 2024). This investment should include both financial resources and training to improve the effectiveness of local governance in responding to crises.

Addressing the root causes of instability and conflict is crucial for long-term resilience. The impact of Middle Eastern conflicts on Africa is often compounded by existing vulnerabilities, such as poverty, political instability, and weak governance. For example, in the Sahel region, the presence of extremist groups is exacerbated by socio-economic grievances and weak state institutions. Developing comprehensive strategies that address these underlying issues—such as promoting economic development, improving governance, and addressing social inequalities—can help mitigate the impact of external conflicts. Programs focused on economic development, such as those aimed at creating job opportunities and improving education, can reduce the appeal of extremist ideologies and contribute to greater stability.

Enhancing international support and coordination is another vital component of building resilience. International organizations and external powers play a significant role in providing humanitarian aid, technical support, and funding for security and

development initiatives. Strengthening coordination among international actors can improve the effectiveness of aid and support. For example, the collaboration between the United Nations and regional organizations in addressing the humanitarian crisis in South Sudan has demonstrated the importance of coordinated international efforts. Ensuring that international support is well-aligned with the needs and priorities of affected regions can enhance its impact and sustainability (Haysom and Battersby 2023).

Improving border security and management is also essential in mitigating the impacts of external conflicts. Effective border management can help prevent the proliferation of arms and reduce the movement of extremist groups across borders. In regions like the Horn of Africa, where porous borders facilitate smuggling and the spread of extremism, enhancing border security is crucial. Initiatives such as strengthening border patrols, improving surveillance, and fostering regional cooperation on border management can help address these issues. Additionally, investing in technology and infrastructure for border security can provide more effective monitoring and control.

Lastly, promoting dialogue and reconciliation processes is important for fostering long-term stability. In regions affected by conflict and extremism, efforts to build peace and reconcile communities can contribute to resilience. Initiatives that bring together different stakeholders, including local communities, government representatives, and international actors, can facilitate dialogue and address grievances. For instance, community-based reconciliation programs in Rwanda, following the genocide, have played a significant role in rebuilding social cohesion and stability. Similar approaches can be applied in other contexts to address the impact of external conflicts and promote enduring peace.

Enhancing resilience in Sub-Saharan Africa in the face of Middle Eastern conflicts requires a multi-faceted approach that includes regional cooperation, strengthening local capacities, addressing root causes of instability, improving international support, enhancing border security, and promoting reconciliation. Implementing these policy recommendations can help build a more robust and resilient framework for addressing the complex challenges arising from external conflicts and contribute to long-term stability and development in affected regions.

## **Conclusion and discussion**

In examining the intersections between Middle Eastern crises and Sub-Saharan African stability, it becomes evident that these external conflicts have profound and multifaceted impacts on the region. The influence of Middle Eastern conflicts extends beyond immediate humanitarian concerns, deeply affecting the economic, security, and governance landscapes in Africa. Addressing these impacts requires a comprehensive understanding of the interconnectedness of global conflicts and regional stability.

The economic disruptions caused by Middle Eastern conflicts significantly affect Sub-Saharan Africa, as demonstrated by the volatility in global oil markets and disruptions in trade routes. African economies that depend heavily on oil imports or global trade routes, such as those involving the Suez Canal, face increased costs and

economic instability when conflicts disrupt these markets. For instance, the fluctuations in oil prices following conflicts in the Middle East create inflationary pressures and higher transportation costs in African countries. Similarly, disruptions in trade routes impact the export and import activities of African nations, exacerbating economic challenges and hindering development.

The proliferation of arms and the spread of extremist ideologies from the Middle East have further complicated the security landscape in Sub-Saharan Africa. Conflicts in the Middle East have facilitated the flow of weapons and militants into the region, contributing to the rise of extremist groups such as Boko Haram and Al-Shabaab. The destabilization of regions like the Sahel and the Horn of Africa reflects the challenges faced by African countries in maintaining security and combating insurgencies. The involvement of external actors and the influx of arms have undermined local governance and exacerbated existing vulnerabilities.

Governance and the rule of law in Sub-Saharan Africa are also significantly impacted by external conflicts. The erosion of state authority and the weakening of legal frameworks in countries like Somalia and Libya illustrate the challenges of managing internal stability in the face of external influences. The inability of local governments to effectively address security threats, manage resources, and provide basic services underscores the broader implications of regional conflicts on governance structures. The interplay between external conflicts and internal governance challenges highlights the need for robust institutional frameworks and effective rule-of-law mechanisms to build resilience and stability.

Addressing the complex impacts of Middle Eastern conflicts on Sub-Saharan Africa requires a multifaceted approach. Regional cooperation and integration are essential for enhancing collective security and addressing cross-border challenges. Strengthening local governance and institutional capacities is crucial for improving crisis management and maintaining rule of law. Additionally, international support and coordination play a vital role in providing humanitarian assistance, technical support, and funding for security and development initiatives. Improving border security and promoting dialogue and reconciliation processes are also key components of building resilience and fostering long-term stability.

In conclusion, the intersections between Middle Eastern crises and Sub-Saharan African stability reveal a complex and interconnected landscape of economic, security, and governance challenges. The impact of external conflicts on Africa underscores the need for comprehensive strategies that address both immediate and long-term concerns. By strengthening regional cooperation, enhancing local governance, and improving international support, Sub-Saharan Africa can better navigate the challenges posed by external conflicts and work towards sustainable development and stability. The path forward requires a concerted effort from both regional and global actors to address the multifaceted impacts of Middle Eastern conflicts and support the resilience and growth of African nations.

### **Supplementary material**

The supplementary material for this article can be found at <https://doi.org/10.46991/JOPS/2024.3.9.011>

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### **Conflict of interests**

The author declares no ethical issues or conflicts of interest in this research.

### **Ethical standards**

The author affirms this research did not involve human subjects.

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## A SMALL STATE WITH GROWING INFLUENCE: BALANCING AZERBAIJAN IN GLOBAL ENERGY POLICY

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### Abstract

Azerbaijan holds a pivotal position in the global energy landscape due to its substantial hydrocarbon resources and strategic location between Europe and Asia. This study examines Azerbaijan's role as a key energy supplier within the context of its relationships with the EU and Russia. Applying role theory as the analytical framework, the research explores how Azerbaijan conceptualizes, negotiates, and performs its energy diplomacy while balancing external pressures and internal objectives. The study addresses three core questions: how Azerbaijan's identity as an energy supplier influences its foreign policy, how it aligns with the EU's energy diversification and sustainability goals, and how it mitigates role conflicts with Russia while preserving its sovereignty. The research employs qualitative methods, analyzing secondary data and policy documents to assess Azerbaijan's strategic approaches. The findings illustrate Azerbaijan's ability to assert agency within asymmetrical power dynamics, reinforcing its energy role with the EU through infrastructure projects like the Southern Gas Corridor, while managing role conflicts with Russia through economic cooperation and pragmatic engagement. This analysis highlights Azerbaijan's adaptability and strategic positioning, contributing to the broader discourse on small-state agency and the geopolitics of energy diplomacy.

**Keywords:** Azerbaijan, role theory, energy diplomacy, European Union, Russia, Southern Gas Corridor, energy security, small-state agency.

### Introduction

Azerbaijan is situated at a key juncture between Europe and Asia and occupies a special place within the international energy landscape. Quite large supplies of hydrocarbon raw material—primarily oil and natural gas—and the advantageous geographical position within the Caspian Basin turn Azerbaijan into a significant provider and hub of energy. It is important for many initiatives aimed at reducing the energy dependence of Europe on Russia, among which it includes the Southern Gas

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Corridor (SGC). There is, however, much more to Azerbaijani foreign policy and energy diplomacy than the raw export of hydrocarbons: the country has to manœuvre a very complex web of geopolitical relationships, while concurrently adhering to shifting tectonic plates in international relations, including an accelerating transition towards renewables.

This is an intricate geopolitical balancing with great challenges and opportunities for Azerbaijan. A relatively small country, it is confronted by external expectations from the EU and Russia, both interested in its energy resources and transit corridors. At the same time, the ruling elite in Azerbaijan conceptualize and bargain over its international identity, balancing the external imperatives with a domestic agenda of economic diversification, political sovereignty, and national self-determination.

While such dynamics do defy conventional representations of small states as objects of international relations, Azerbaijan is a specific case that testifies to agency on the part of small states in forms of successfully adjusting to external influences or even using one's resources as levers within the international system. The application of role theory strengthens the examination of Azerbaijan's energy diplomacy by providing a theoretical framework through which to investigate how states conceptualize, negotiate, and then enact their roles within the global system. The role theory emphasizes how the internal conception of a state's role—its self-identified identity and purposes—is dynamically interrelated with the external expectations of roles created by other international actors (Holsti 1970; Holsti 1978). This particular framework is exceptionally useful for Azerbaijan because it explains the country's behavior of balancing between contradictory influences from the EU and Russia. The EU sees Azerbaijan as a critical partner in its plans for energy source diversification and transition to cleaner energy sources (Azimov 2021). Meanwhile, Russia tries to keep Azerbaijan within its orbit, at least regarding energy matters, drawing on its historical prerogatives as a regional hegemon (Aleksanyan 2024; Wilson 2017).

Given these competing pressures, this paper explores how Azerbaijan conceptualizes and performs its role as an energy supplier to mediate between the influences of the EU and Russia. Specifically, the study examines how Azerbaijan's self-identification as an energy supplier shapes its foreign policy, how it coordinates its role with the EU's objectives on diversification and sustainable energy, and how it mitigates potential role conflicts with Russia while pursuing its energy agenda.

We use the interpretive lens of role theory to argue that Azerbaijan performs the role of energy supplier not only through the shipment of hydrocarbons, but in a two-pronged manner: investment in renewable energy resources, coupled with close cooperation with world powers, to mediate the drives of the EU for energy diversification and sustainability with those of Russia towards securing regional hegemony. Through the deliberate construction and adjustment of its international identity, Azerbaijan demonstrates a remarkable capacity for strategic adaptability and agency within highly competitive geopolitical contexts. This paper contributes to the existing literature on the agency of small states in international relations by illustrating how Azerbaijan effectively navigates competing demands from major global and regional powers (Galstyan 2024). A closer examination of Azerbaijan's energy diplomacy reveals how small states can overcome external constraints, leverage their

unique strengths, and maintain relevance in an ever-evolving international environment.

### **Historical Evolution of Azerbaijan's Role as an Energy Supplier**

The evolution of Azerbaijan's role as a key energy supplier is deeply rooted in its historical path, heavily marked by previous periods of independence, foreign domination, and further recovery of self-government (Cornell 2011, 199). In this respect, from the very beginning as a large oil producer at the end of the 19th century to strategic readjustments following the fall of the Soviet Union, Azerbaijan's energy sector has represented a complex relationship between external constraint and internal aspiration. This section examines the historical variables that significantly shaped Azerbaijan's perception of its national role as an energy supplier. These include the legacy of the Soviet period, marked by centralized control and resource exploitation; the challenges of the post-Soviet transition, characterized by economic and political instability; and the transformative developments that established Azerbaijan as a pivotal player in the global energy market (Polláková 2018).

Azerbaijan's significance as an energy producer commenced in the late 19th and early 20th centuries, during which time the area established itself as a worldwide frontrunner in oil production (Altstadt 2017). By the year 1901, Baku was responsible for over fifty percent of global oil output, thereby drawing substantial foreign investment and fostering technological progress. However, all that dramatically changed in the course of Azerbaijan with the Soviet takeover in 1920. During the Soviet rule, the energy resources of Azerbaijan were centralized, included in the general industrial complex of the USSR, and exploited systematically for the purposes of the Soviet Union (Yergin 2008). Although that period had some positive features of technological and infrastructural progress, it reduced Azerbaijan's autonomy and made it a peripheral source within a commanding system (Cornell 2011, 199-203). The oil supplies of Azerbaijan played an important role in the Soviet military campaign during the period of World War II, providing a large portion of fuel used by the Red Army. Given the highly centralized nature of Soviet politics, however, this provided little say for Azerbaijan as to its own resources (Mukhtarov, Aliyev and Maharramli 2022; Abbasov, Karimov and Jafarova 2022). Decisions on exploration, extraction, and distribution were made in Moscow, and the authority of Azerbaijan was strictly limited (Yergin 2008). This externally imposed role brought immense role strain as the aspiration of independence was not in consort with being compelled to depend upon the Soviet system (Cornell 2011, 199-203).

With the collapse of the Soviet Union in 1991, developments in energy resources took a different dimension. Of course, with independence came the opportunity for Azerbaijan to assume full control over its energy resources, but with this came a considerable challenge. The early years of the 1990s were characterized by political instability, an economic decline, and the disastrous (for Azerbaijan) outcomes of the Nagorno-Karabakh conflict (Melander 2001). It is within this period that the Azerbaijan Government realized that its energy sector played a vital role in the stabilization of the economy, strengthening sovereignty, and reconstructing

international prestige (Cornell 2011, 199-203). President Heydar Aliyev, who came to power in 1993, managed to reconstruct Azerbaijan's national role conception as an important supplier of energy (Ibrahimov 2024). Aliyev's perspective was fixed on remodeling Azerbaijan from an obedient energy supplier in the Soviet setup into an independent actor capable of using its resources to rejuvenate the nation (Ibrahimov 2024). The process inherently called for a deliberate act of playing the role whereby Azerbaijan assumed full responsibility for its energy initiatives and actively engaged with international partners to become a key player in the global energy sphere.

The signing of the 1994 'Contract of the Century' marked a watershed in Azerbaijan's energy diplomacy since the break-up of the Soviet Union (Caspian-Alpine Society 2024). That deal, grouping together a consortium of Western oil companies, reflected a strategic turn by Azerbaijan toward Western markets and structures. The agreement paved the way for foreign investment in the development of large oil fields, such as the Azeri-Chirag-Gunashli (ACG) field, and laid the foundation for Azerbaijan's long-term energy policy (Caspian-Alpine Society 2024). It demonstrated, besides its economic significance, that Azerbaijan was seriously building along the road of sovereignty, showing capabilities to dramatize this position of an independent energy provider. The Contract of the Century has given the opportunity for Azerbaijan to gain success in repositioning itself externally as a reliable partner in the context of global energy security (Aliyev et al. 2024; Tarasova 2017). Internally, this performance of the new role was supplemented with considerable efforts of aligning national goals - economic development, sovereignty - with external expectations of stability and reliability. The role shifting of Azerbaijan from a marginal player in Soviet times to an active player in the global energy diplomacy game testifies to its capability for strategic role enactment and bargaining (Cornell 2011, 207-212).

Ilham Aliyev continued to broaden this vision, ensuring the policy of modernization and diversification in the energy sphere, representing big infrastructure projects as signs of national success. A major breakthrough in this regard was the Baku-Tbilisi-Ceyhan pipeline, finally completed in May 2006, which linked Azerbaijani oil supplies directly to the West via Georgia and Türkiye. Avoiding Russian territory, the BTC pipeline became a symbol of Azerbaijan's determination to control its export routes and further align itself with Western interests. The emergence of the SGC further strengthened Azerbaijan's strategic position in terms of European energy security (Cornell 2011, 207-212). The SGC, comprising the South Caucasus Pipeline, the Trans-Anatolian Pipeline, and the Trans Adriatic Pipeline, directly connects Azerbaijani gas to European consumers, solidifying Azerbaijan's role as a crucial energy supplier for Europe (Siddi 2018; Winrow 2013). All these steps raised not only Azerbaijan's geopolitical importance but also proved that it is capable of finding its way out of the opposite interests of both the regional players and international actors. Iconic architectural images, like the Flame Towers in Baku, became visual representations of Azerbaijan's energy riches and its aspirations to develop the country further, stitching energy into the cultural and symbolic fabric of the nation.

These actions with accompanying narratives linked energy resources to national pride and tacked on public opinions to the strategic goals of the government. Energy was more than just a commodity; it was framed in such a way that, besides being a

unifying force, it could also rise above the country's problems, including the legacy of Soviet subordination and the decades-long conflict over Nagorno-Karabakh. While cultivating the national value of energy independence, Azerbaijan reduced potential role strain between public opinion and its state role performance on the global stage.

This has, however, come with its share of challenges. Despite the revenues from energy that have propelled huge economic growth, serious concerns around corruption, inequality in income, and regional disparities are still prevalent (Cornell 2011, 238-240). Reports by international organizations, including Transparency International (2017) and the World Bank (2022), show challenges in governance that undermine efforts toward the fair distribution of energy wealth. Added to these factors, centralization of power in the Aliyev administration has exacerbated them, where critics pointed out how the state's narrative of energy wealth as a unifying force clashed with lived experiences at the margins. The mismatch brings along tensions that entangle efforts at keeping internal cohesion and a stable national identity.

### **The EU's Energy Diversification Strategy and the Performance of Azerbaijan's Role**

The EU has long grappled with energy security concerns due to its heavy dependence on Russian gas supplies (Gils 2019; Gils 2024). Historical events such as the Russia-Ukraine gas disputes in 2006 and 2009 exposed the vulnerabilities associated with this dependence, prompting the EU to seek diversification of both energy sources and transit routes (Rodríguez-Fernández, Fernández Carvajal and Ruiz-Gómez 2020).

As Azerbaijan worked to consolidate its role as a key energy supplier, the European Union introduced new external role expectations that redefined the strategic importance of Azerbaijani energy. These expectations gained urgency with the outbreak of the Russia-Ukraine war, which fundamentally altered the EU's energy priorities. Before the war, Russia accounted for approximately 40% of the EU's natural gas imports, leaving Europe vulnerable to geopolitical coercion (Celi, Guarascio, Reljic et al. 2022). With Russia weaponizing energy exports by reducing flows through pipelines like Nord Stream 1, the EU launched the REPowerEU plan in May 2022 to accelerate its transition away from Russian gas and diversify its energy sources (Siddi 2023).

Azerbaijan's strategic significance grew considerably within this context. The new 2022 EU-Azerbaijan Memorandum of Understanding on Strategic Energy Partnership (European Commission 2022) formalized this relationship, reflecting the EU's expectation that Azerbaijan would expand its gas exports to meet Europe's immediate needs. In 2023, Azerbaijan exported approximately 11.8 billion cubic meters (bcm) of natural gas to Europe (Shahbazov 2024), accounting for about 2.5% of the EU's total gas consumption. On the oil front, the EU imported around 19.8 million tonnes of Azerbaijani crude in 2022 (LUKOIL 2022; Ibadoglu 2024), representing approximately 5% of the EU's total crude oil imports. These figures underscore Azerbaijan's role as a key, though not dominant, energy supplier to the EU, highlighting the strategic importance of its energy resources in the region's diversification efforts.

With Azerbaijan being in an important position for EU projects of energy diversification, its potential for selective adaptation to these demands is a looming issue (Gils 2024). While the EU presses for transparency, governance reforms, human rights and democracy, and compatibility with sustainability goals, Azerbaijan pitches those aspects of the partnership that enhance its sovereignty and geopolitical importance in order to avoid broader demands for political change (Gils 2019; Gils 2024). The State Oil Company of Azerbaijan Republic (SOCAR) exemplifies this adaptation. To maintain credibility with European partners, SOCAR has implemented governance improvements, such as adopting international financial reporting standards and increasing operational transparency. These changes enhance Azerbaijan's reputation as a dependable partner while securing continued investment in its energy infrastructure. Nevertheless, governance practices in Azerbaijan still raise many controversies. The 2023 resolution by the European Parliament expressed concern with democratic deficiencies and the human rights record in Azerbaijan, indicating tensions between the EU normative agenda and domestic policy in Azerbaijan (European Parliament 2023). These critiques notwithstanding, the EU has mainly compartmentalized the relationship with Azerbaijan, bracketing political reform for energy security (Kamilsoy and Zamejc 2022). Such pragmatism underlines the urgency with which Europe needs to make sure that its energy supply is stable in light of the Russia-Ukraine War.

Azerbaijan's partnership with the EU concerning energy security is consistent with shared objectives; however, it simultaneously engenders intrinsic tensions owing to conflicting role expectations (Gils 2024; Gils 2018). The EU's strategic alliance with Azerbaijan emphasizes energy security and diversification; nonetheless, its extensive normative framework—which encompasses expectations for governance reforms, transparency, and adherence to human rights—poses a risk of role strain. From the point of view of role theory, Azerbaijan's role conflict follows from the divergence between internal role conceptions—sovereignty and domestic control in first place—and external role expectations from the EU. In addressing this conflict, Azerbaijan has pursued approaches of selective engagement focused on the fulfillment of energy-related expectations while limiting political critiques. For example, the Azerbaijani authorities have framed the SGC as an entirely economic project, deliberately refusing to align with the political attitudes of the EU. The framing of issues reduces tensions and allows Azerbaijan to maintain a fragmented relationship wherein energy cooperation is stepped up despite far-reaching normative incompatibilities.

It remains, however, to be proven feasible. The increasing focus on renewable energy sources and climate commitments by the EU raises questions regarding the long-term viability of the hydrocarbon-based aspect of Azerbaijan's strategy. The European Green Deal (European Commission 2024b) and the following REPowerEU (European Commission 2022) plan have marked a shift in the EU's attention in which the role of Azerbaijan as a gas supplier is bound to shrink. This shift in the EU toward cleaner energy will also allow Azerbaijan to sidestep implications for being less relevant. With that in mind, Azerbaijan, being aware of the changing character of the global energy market, started to adopt renewable energy sources into its energy mix.

This step constitutes an effort toward maintaining its position as a reliable energy partner for Europe (LaPorte 2024).

Since 2022, Azerbaijan has signed agreements with international investors for the development of serious projects on renewable energy, including wind and solar stations totaling more than 700 megawatts. This strategic shift, therefore, coincides with the priorities of the EU geared toward sustainability and climate action. By investing in renewables, Azerbaijan positions itself as a progressive energy partner that could help meet the long-term energy goals of Europe (Civillini 2024). For example, the state has signed cooperation with the EU within the Green Energy Partnership for the purpose of integrating renewable energy sources into the SGC infrastructure (European Commission 2024a, 2024b). Such steps show that Azerbaijan is ready to change its role performance considering the emergence of new external demands without any loss of independence. Viewed through the lens of role theory, Azerbaijan's renewable energy initiative illustrates the nation's ability to adapt its roles. By broadening its self-perception from a conventional hydrocarbon supplier to a multifaceted energy provider, Azerbaijan mitigates possible role strain and improves its strategic adaptability. Challenges, however, remain: at the current moment, renewable energy potential is still in its infancy in Azerbaijan, and such a transition requires huge financial investment, technological know-how, and institutional reforms (Civillini 2024).

### **Russia's Role Expectations and Azerbaijan's Strategic Position**

Russia's relationship with Azerbaijan is shaped by a complex interplay of power dynamics, historical ties, and evolving geopolitical realities. Through the lens of role theory, Moscow's approach reflects a persistent effort to prescribe Azerbaijan a role that aligns with its strategic objectives. These include safeguarding Russia's influence in the South Caucasus, maintaining dominance over regional energy flows, and limiting Azerbaijan's integration with Western structures (Naumkin 2002; German 2022; Manukyan 2024; Mankoff 2022). However, Azerbaijan's self-perception as a sovereign and independent energy supplier often diverges sharply from these external expectations, creating a continuous undercurrent of role conflict between the two states (Aslanli 2010; Köstem 2022).

Russia views Azerbaijan as strategically vital due to its geographic position and energy potential. The South Caucasus serves as a crucial buffer zone and transit corridor, connecting Europe and Asia (Shlykov 2024). Azerbaijan's significant hydrocarbon resources make it a key player in global energy markets, further elevating its importance in regional calculations. Moscow's expectations for Azerbaijan are deeply embedded in its broader geopolitical strategy, which seeks to preserve its traditional dominance over the post-Soviet space.

Azerbaijan, however, has consistently resisted these prescriptions, asserting its independence through policies and projects that bypass Russian influence (Ismayilov 2019; Çakmak and Özşahin 2023). The Southern Gas Corridor (SGC), which directly connects Caspian gas to European markets, epitomizes Azerbaijan's defiance of Moscow's expectations. This divergence underscores the fundamental conflict between

Russia's prescribed role for Azerbaijan and Baku's own priorities (Çakmak and Özşahin 2023; Silaev 2021). The Ukraine war has significantly amplified these dynamics, altering both the regional balance of power and the global energy landscape. As Europe moved to reduce its dependency on Russian gas, Azerbaijan emerged as a crucial alternative supplier. This shift has allowed Azerbaijan to assert its role more confidently, deepening its partnerships with European states while Russia's traditional dominance in the region has declined.

Russia's response to these developments reflects both adaptation and persistence. On one hand, Moscow continues to seek influence in Azerbaijan's energy sector through economic ties. Russian energy companies, such as LUKOIL, hold stakes in major Azerbaijani projects like the Shah Deniz gas field, maintaining a foothold in Azerbaijan's hydrocarbon industry. These investments create a degree of interdependence that mitigates tensions and ensures continued cooperation in certain areas. On the other hand, Russia employs diplomatic and economic tools to encourage alignment. Initiatives such as discounted energy supplies and offers of infrastructure collaboration aim to entice Azerbaijan into closer integration with Russian-led frameworks, though with limited success.

From Azerbaijan's perspective, maintaining pragmatic ties with Russia is essential for mitigating the risks of outright conflict. Azerbaijan avoids direct confrontation by framing its energy initiatives as economic endeavors rather than geopolitical maneuvers against Russia. This neutral framing reduces the likelihood of escalating tensions and enables Azerbaijan to pursue its energy agenda without provoking Moscow. For example, while Azerbaijan prioritizes export routes like the SGC and Baku-Tbilisi-Ceyhan (BTC) pipeline, it continues to use the Baku-Novorossiysk pipeline for some oil exports, signaling its willingness to maintain limited cooperation with Russia.

The broader implications of this balancing act highlight Azerbaijan's ability to leverage its strategic assets to navigate asymmetrical power dynamics. By capitalizing on its geographic position and energy resources, Azerbaijan asserts its autonomy while simultaneously mitigating the pressures imposed by Russia's role expectations. The post-Ukraine geopolitical environment has further strengthened Azerbaijan's hand, enabling it to perform its self-identified role as a sovereign energy supplier with greater confidence.

The role conflict between Azerbaijan and Russia ultimately illustrates the complexities of small-state agency in the context of great-power influence. While Moscow continues to promote its expectations through economic and diplomatic channels, Azerbaijan actively reshapes its role to align with its national interests. This dynamic underscores the fluidity of roles in international relations, where smaller states can challenge external prescriptions by leveraging strategic assets and pursuing adaptive strategies.

### **Mitigating Role Conflict: Azerbaijan's Pragmatic Balancing**

Azerbaijan's ability to mitigate role conflicts with Russia lies in its pragmatic approach, blending strategic cooperation with diplomatic neutrality and selective

engagement. As Azerbaijan asserts itself as a sovereign energy supplier and deepens its ties with Europe, it simultaneously manages the expectations of its more powerful northern neighbor. This balancing act is particularly challenging given Russia's historical dominance in the South Caucasus and its role as a major energy competitor. By fostering economic interdependence, maintaining neutral rhetoric, and accommodating limited Russian interests, Azerbaijan mitigates potential tensions without compromising its core national priorities.

One key aspect of Azerbaijan's strategy is its deliberate focus on fostering mutually beneficial economic ties with Russia (Graef 2023; Tyushka 2024). The bilateral trade relationship remains strong, with Azerbaijan exporting agricultural products, polymers, and industrial goods to Russia while importing machinery and essential commodities. This economic interdependence has been particularly important for Russia, whose economy faces the strain of international sanctions following the Ukraine war (Graef 2023). Azerbaijan's logistical and trade contributions, including its role in the International North-South Transport Corridor, have provided Russia with critical access to global markets (Vinokurov, Ahunbaev and Zaboev 2022; Odintsov 2022). These pragmatic engagements reduce the likelihood of conflict by emphasizing shared economic interests rather than geopolitical competition (Götz 2022; Skalamera 2022).

In the energy sector, Azerbaijan avoids openly antagonizing Russia while pursuing its independent agenda. Russian energy companies, such as LUKOIL (LUKOIL 2022; Ibadoglu 2024), maintain stakes in key Azerbaijani projects like the Shah Deniz gas field. These partnerships create a degree of interdependence that moderates potential friction, as both countries benefit economically. Azerbaijan also continues to export a portion of its oil through the Baku-Novorossiysk pipeline (Ismailov and Nadjafova 2022), even as the majority of its exports are directed westward through the Baku-Tbilisi-Ceyhan (BTC) pipeline and the Southern Gas Corridor (SGC). By maintaining limited cooperation in energy transit, Azerbaijan signals its willingness to accommodate some Russian interests while prioritizing its alignment with European markets.

Another vital component of Azerbaijan's strategy is its commitment to neutral rhetoric and careful framing of its energy initiatives. Unlike other countries in the region, Azerbaijan avoids openly criticizing Russia or framing its energy projects as geopolitical maneuvers. Instead, it presents initiatives such as the SGC as apolitical efforts to enhance regional energy security and economic development. This narrative minimizes the perception of Azerbaijan as a rival to Russia and reduces the risk of overt confrontation. By framing its actions in terms of mutual benefit, Azerbaijan fosters an environment conducive to dialogue and cooperation (Veebel and Ploom 2024), even as it pursues divergent objectives.

The full annexation of the Nagorno-Karabakh in 2020-2023 marked a significant turning point in Azerbaijan's relationship with Russia. Following the withdrawal of Russian peacekeeping forces and Azerbaijan's full annexation of the region, Baku eliminated a longstanding source of external influence in its domestic affairs. Russia's preoccupation with the Ukraine war and its diminished regional influence have limited its ability to assert control over Azerbaijan's decisions. This has allowed Azerbaijan to

consolidate its sovereignty in the South Caucasus without facing significant backlash from Moscow.

From a role theory perspective, Azerbaijan's approach exemplifies the concept of role negotiation and adaptation. Faced with conflicting expectations from Russia and Europe, Azerbaijan has successfully redefined its role as a sovereign energy supplier by leveraging its geographic position, energy resources, and diplomatic flexibility. The key to this success lies in Azerbaijan's ability to align certain aspects of its role performance with Russian interests while pursuing its broader objectives independently. For example, by continuing economic and energy ties with Russia, Azerbaijan reduces role strain and creates space for maneuver in its relationships with other powers.

Multi-vector diplomacy remains a cornerstone of Azerbaijan's strategy. By cultivating strong ties with Türkiye, the EU, and other regional actors, Azerbaijan dilutes Russia's influence and ensures access to alternative sources of support (Murinson 2009). This multi-faceted approach enables Azerbaijan to maintain its strategic autonomy without becoming overly reliant on any single actor. For instance, Azerbaijan's partnerships with Türkiye, exemplified by the Trans-Anatolian Pipeline (TANAP), and its alignment with European energy priorities through the SGC, underscore its ability to balance competing pressures (Yorucu and Mehmet 2022). At the same time, Azerbaijan continues to engage with Russia through multilateral forums and bilateral agreements, signaling its commitment to regional stability.

Despite these successes, Azerbaijan's balancing act remains fraught with challenges. The asymmetry in power dynamics with Russia necessitates constant vigilance, as any significant shifts in Moscow's posture could disrupt the delicate equilibrium. Furthermore, Azerbaijan's growing alignment with Europe, particularly in the energy sector, increases the risk of geopolitical friction, especially as Russia seeks to reassert its influence in the South Caucasus. However, Azerbaijan's strategic use of framing, coupled with its pragmatic engagement with Russia, mitigates these risks and preserves its ability to act independently.

## Conclusion and discussion

Azerbaijan's energy diplomacy illustrates the complexities and opportunities faced by small states in responding to asymmetrical power dynamics within a globalized and interconnected world. Positioned at the intersection of Europe and Asia, Azerbaijan has leveraged its geographic location, substantial hydrocarbon resources, and strategic partnerships to emerge as a critical energy supplier in a rapidly evolving international energy landscape (Gurbanov and Mammadli 2024). Through the application of role theory, this analysis highlights Azerbaijan's ability to conceptualize, negotiate, and perform its role as an energy supplier amidst competing pressures from the EU and Russia.

Azerbaijan's pursuit of sovereignty and strategic autonomy underpins its foreign policy and energy diplomacy. From the historical constraints of the Soviet era to the transformative 'Contract of the Century', Azerbaijan has consistently sought to assert its independence through deliberate infrastructure development and partnerships. The

Southern Gas Corridor, the Baku-Tbilisi-Ceyhan pipeline, and other strategic projects exemplify Azerbaijan's role as an indispensable energy provider to Europe, reducing the continent's dependence on Russian energy supplies. This role has only grown in significance in the context of the Russia-Ukraine war, which has reshaped European energy priorities and placed Azerbaijan at the center of diversification efforts. However, Azerbaijan's role as an energy supplier is not without challenges. While its collaboration with the EU has elevated its strategic importance, it has also created role conflicts with Russia. Moscow's historical dominance in the South Caucasus and its desire to control regional energy flows often clash with Azerbaijan's independent energy policies. Yet Azerbaijan has successfully mitigated these conflicts through pragmatic engagement, economic interdependence, and strategic framing of its energy initiatives as apolitical. The continued use of the Baku-Novorossiysk pipeline and partnerships with Russian energy companies like LUKOIL demonstrate Azerbaijan's willingness to accommodate certain Russian interests without compromising its broader objectives.

The annexation of Nagorno-Karabakh in 2023 created new risks to the national and human security of Armenians and Armenia (Barbieri and Aleksanyan 2024), and further strengthened Azerbaijan's sovereign foreign policy and diminished Russia's influence in the region. The withdrawal of Russian peacekeepers and the complete annexation of Nagorno-Karabakh territory and the occupation of part of Armenia by Azerbaijan marked a decisive shift in regional dynamics, allowing the Azerbaijani leadership to focus more on national development and energy diplomacy. This turning point underscores Azerbaijan's growing confidence and its ability to find a delicate balance between asserting its sovereignty and maintaining stable relations with its northern neighbor.

Azerbaijan's energy diplomacy provides valuable insights into the agency of small states in global politics. By leveraging its strategic assets, managing role conflicts, and adopting a multi-vector foreign policy, Azerbaijan demonstrates that even smaller nations can shape their roles in the international system. Its ability to adapt to shifting global dynamics while maintaining its sovereignty offers a model for other small states facing similar challenges. As Azerbaijan continues to transition toward renewables and address governance challenges, its energy diplomacy will remain a cornerstone of its foreign policy, exemplifying the resilience and agency of small states in a competitive and uncertain world.

### **Supplementary material**

The supplementary material for this article can be found at  
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### **Conflict of interests**

The author declares no ethical issues or conflicts of interest in this research.

## Ethical standards

The author affirms this research did not involve human subjects.

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## REIMAGINING COUNTERSTRUGGLE AS A COMPREHENSIVE THEORETICAL FRAMEWORK FOR POLICY DESIGN AND IMPLEMENTATION: DIMENSIONS AND FACTORS OF STRUGGLE AND RESISTANCE

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### Abstract

This article analyzes strategic issues related to political factors of counterstruggle, which manifest different dimensions of confrontation, counteraction, opposition and resistance. This stimulates the development of innovative solutions that are actively used by political actors to analyze the economic, social, political situation in countries and regions with transitional political and economic systems, as well as to prepare public opinion for making important political decisions. In this context, political assets can quickly transform into liabilities, and ignored liabilities can become invaluable assets. Existing conceptual frameworks for policymaking fail to effectively address the enormous uncertainty inherent in environmental assessment, especially the complexity of constant, gradual change. The counterstruggle framework offers a more effective approach, mitigating the oversimplifications often found in geopolitical analysis. This framework builds on the trifunctional hypothesis, emphasizing compensatory capacities and the need for a balance between all factors to achieve a given goal. This article analyzes the interplay of space, time, and force within counterstruggle that gives rise to trifunctionality. This provides insight into the adaptive capacity available to navigate uncertainty and change, ultimately contributing to the stability that states and societies seek. The relationship between politics and economics goes far beyond our usual perception, in an inverse correlation influenced by the multiplicative effect of counterstruggle factors. In situations marked by uncertainty, the ability to quickly assess and adapt to the current environment becomes paramount, opening up numerous underappreciated methods of policy research.

**Keywords:** conception, conceptual framework, thinking tool, confrontation, counterstruggle, counteraction, opposition, resistance.

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## Introduction

Determined by political counterstruggle (protivoborstvo)<sup>\*</sup>, experience and interests of political subjects, political sciences at the same time develop according to their own laws, that is, they possess relative independence and internal logic of their development. At the present stage, the development of political science arises on the basis of the previous stage, which was accumulated earlier, at previous stages. Continuity in political science is the fact that in reality itself there is a progressive development of objects and phenomena, caused by their inherent contradictions.

A. Einstein and L. Infeld described this process very figuratively: “Creating a new theory is not like destroying an old barn and erecting a skyscraper in its place. It is rather like climbing a mountain, gaining new and wider views, discovering unexpected connections between our starting points and its rich environment. But the point from which we started out still exists and can be seen, although it appears smaller and forms a tiny part of our broad view gained by the mastery of the obstacles on our adventurous way up.” (Einstein and Infeld 1938).

Novaculum Nominalium or Occam’s Razor is a double-edged weapon. In politics, it is particularly sensitive because of the unforeseen consequences that arise. In pursuit of a simple formula of happiness or a concept understandable to all, especially with the wrong thinking tool, there is always a huge risk of throwing the baby out with the bathwater. The dogmatic nature of this weapon, which in unskilful hands or unstrengthened minds can cut off not only everything unnecessary, is beyond doubt (Thorburn 1918, 352). However, in order not to turn a sound rule of methodology into a metaphysical dogma, as sometimes happens with Occam’s Razor, it is necessary to build the conception not on a myth, but on a thinking tool. Moreover, here it is important to realize that the phrase “*Entia non sunt multiplicanda praeter necessitatem*” does not mean primitivism. Simply unjustifiably cutting something off with Occam’s razor can destroy the foundation of advanced thought or the basis for analyzing a political situation. Curiosity, the precursor to the beginning of creative thinking and the innovative process, is the multiplication of entities. In addition, later on, when you have to give up some previous experience, when you move to a qualitatively new level, it does not seriously damage creative thinking, because the cognition of a multiplicity of entities can be useful in something else. Jakob Burckhardt warned of the lack of benefit of violent simplification of a picture of the world, which logically must yield to a still more violent one. He believed that we should avoid simplifications because “one abstraction made way for a second, still greater abstraction.” “In the end, people become exceedingly sensitive to any differentiation; the simplification and standardization secured by the great State suffice no longer.” (Burckhardt 1950, 95, 116).

The conception of geopolitics is a typical victim of Occam’s razor, and its simplicity hides its primitivism. The basis of any conception is the thinking tool with which it is developed. For geopolitics, this tool was territorial space. The conception of

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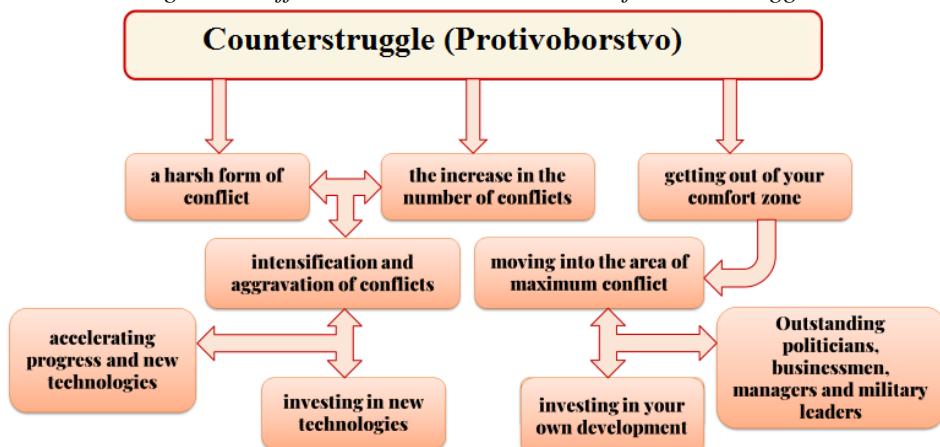
<sup>\*</sup> In this article, the concept of ‘Counterstruggle’ (Protivoborstvo) also includes ‘Confrontation’, ‘Counteraction’, ‘Opposition’ and ‘Resistance’, since this concept means a struggle against someone or something, resistance to someone or something.

geopolitics is based on space, not even in its diversity, as it could be presented by the science of the 20th century. In such a conception, relying on only one-factor leads to the fact that there are no compensatory factors at all. This leads to difficulty in achieving balance when it becomes necessary. It is the strategies based on such a conception that quite often lead to one-sided development of the state, where the balance is imperceptibly disturbed when the environment changes. For example, we know from history that any empire always takes as a basis the conception of geopolitics, i.e. expansion of territorial space. However, all empires sooner or later begin to disintegrate or its territorial space shrinks over time as resources and the ability to hold territories diminish. This shows that without taking into account other factors such as time and force, the conception of geopolitics does not give a balanced action.

In contrast to the conception of geopolitics, the conception of counterstruggle is based on three basic factors. In fact, its working tools are three factors that require constant balancing. The flexibility of the conception lies in the fact that each factor is compensatory for the other two. In three factors - space, time and force - space is the primary factor, but not the key factor and not more important than the other two.

What is counterstruggle? Counterstruggle (protivoborstvo) is a struggle against someone or something, resistance to someone or something (Efremova 2001). Quarrel, conflict, battle, war all this is counterstruggle, and this state in man is inherent in nature. T. Hobbes in chapter XIII of Leviathan states that principal causes of quarrel are hidden in the nature of man. "For war, consisteth not in battle only, or the act of fighting; but in a tract of time, wherein the will to contend by battle is sufficiently known: and therefore the notion of time, is to be considered in the nature of war." (Hobbes 1998, 83-84). Hobbes's war includes various forms of struggle or resistance, i.e. actually extended counterstruggle, and time is a critical factor in any struggle. Counterstruggle appears where there is a rigid form of conflict, an increase in the number of conflicts and an exit from the comfort zone (see Figure 1).

*Figure 1. Different levels and dimensions of counterstruggle*



Therefore, counterstruggle generating harsh conflict gives impetus to investment in modern technologies, increase and aggravation of conflicts and disturbance of balance gives impetus to acceleration of progress and new technologies, people getting out of their comfort zone gives very strong development of personality in conditions of such conflict, which leads to emergence of outstanding personalities and heroes.

These profoundly transformative conflicts, which are the cornerstone of our coexistence, lead to uncertainty, which translates into uncertainty and fear in decision-making. Napoleon remarked on the point that generals were rarely in a hurry to give battle: "They were well into their positions, entrenched, thinking about their combinations; but there began their indecision; and nothing is more difficult, and yet more precious, than to know how to make up one's mind." (Emmanuel 2021). These feelings of uncertainty and fear in decision-making force us into a mode of short-term crisis management - to the detriment of long-term strategic and sustainable solutions. This reactive approach gives the adversary an advantage if he is better able to assess the constantly changing environment and adjust strategic decision-making to preempt our tactical decisions driven by short-term management. Prussian Field-Marshal Moltke gave very valuable advice on how to act under conditions of uncertainty: "The main point in a series of genuinely special cases is to perceive the situation hidden in the fog of uncertainty, correctly to estimate what is known, to deduce what is unknown, to arrive at a quick decision, and to carry it out powerfully and consistently." (Moltke 1993, 92-93). This advice provides an understanding of where the sources of errors in decision making are hidden and the main ones arise in cognition of the factual situation, in assessing the given, in determining the unknown and in executing the decision. In the process of struggle, managers make mistakes on all these points.

In confrontation, constantly emerging problems require ever new methods of action, the use of ever new means, so that it is always possible to adhere to a single strategic goal and a balance of counterstruggle factors. Fulfilling this requirement is not easy, as the complex environment in some managers reduces mental flexibility and paralyses the will. This stems from the fact that formulaic solutions do not work and one-sided thinking closes the way to alternatives. To break this vicious circle, we need a paradigm shift. The conception of counterstruggle helps to restore mental flexibility and commitment to proactive action. It is not a template, but a thinking tool for each specific case, the application of which requires first a careful weighing of factors and after balancing them.

### **A thinking tool of the conception**

Thinking tools are one of the key pillars of counterstruggle conception design. What is a thinking tool?

Imagine that you are standing in a field and you do not see that the earth is round. However, having seen in the field that the earth is flat, you no longer think that way today because you have a thinking tool that gives you the ability to think differently. Your thinking comes from knowledge of astronomy (celestial bodies have the shape of a ball) and physics (gravity or Newton's law of universal gravitation). Therefore, without seeing the curvature of the earth, you as a thinking tool apply not only what

you see, but also the experience of knowledge. This is how we have manifested a globe where we can all see and study our planet. There are also geographical and topographical maps that give you orientation on the ground. A map is also a tool, but it is already a different thinking tool. With a map, a person has a completely different thinking, because orientation on the terrain with and without a map gives completely different results. Moreover, with each new use of a map, a person starts to think faster and more creatively, because he has a new tool, on the basis of which new experience and new knowledge appear, and accordingly his thinking changes.

One of the thinking tools within the conception of counterstruggle is the tripartite scheme for constructing ideologies, conceptions and social structures. Since ancient times, the tripartite or trifunctional model of any social system or structure has been considered the most harmonious in Indo-European culture: “the tripartite ideology constituted a consistent but flexible system...There are reasons for believing that the tripartite ideology, though elaborated during the common period, had driven out or radically reinterpreted equally venerable conceptions.” (Eliade 1981, 195). Despite the different ways of thinking of the Indo-Europeans, “the general structure of the Indo-European ideology...informs us concerning the type of religious experience and speculation peculiar to the Indo-Europeans. It allows us, furthermore, to appreciate the particular creativity of each of the Aryanspeaking peoples.” (Eliade 1981, 194).

The tripartite social division represents the theory of three social functions and their corresponding ideologies as a phenomenon connected with the real process of social life and social relations. This phenomenon with each new and important stage in the life of society only emphasizes the fundamentality of the tripartite structure in the development of Indo-European society and its ideological attitudes. The universality of the trifunctional theory is the result of social realities, since “division into three by function” is a necessary stage in the evolution of any ideology, especially social ideology. The main point is that this model emerged or re-emerged just when it seemed to suit the development of western European society (Goff 1992, 256-257). This universality is also evident in the use of tripartite structures in contemporary rhetoric and political discourse: *veni, vidi, vici*; *liberty, equality, fraternity*; *signed, sealed, and delivered*; *father, son, and Holy Spirit*; *Tom, Dick, and Harry*; *the truth, the whole truth and nothing but the truth*; *this, that, and the other*. For these tripartite structures, as can be seen, are characterized by rhythmicity, a certain sequence, alternation of intonation, which allows the speaker to demonstrate systematicity, structural integrity, as well as to present community and unity with the listeners. Tripartite is the most rational social structure for human beings. Such constructions are a characteristic feature of political discourse, because through them they give an assessment of political subjects or phenomena, encouraging their target audience to approval or action (Atkinson 1984, 57-60). Here are prime examples of this (Crystal 2018, 378):

- Mark Antony (The first line of a speech in the play *Julius Caesar*, by William Shakespeare): *Friends, Romans, countrymen, lend me your ears.*
- Abraham Lincoln (From Gettysburg Address): *Government of the people, by the people, for the people.*
- Winston Churchill (From the traditional speech of the Prime Minister at the Lord Mayor’s banquet at Mansion House on November 10, 1942): *This is not*

*the end. It is not even the beginning of the end. But it is perhaps the end of the beginning.*

The construction of trifunctionality is a place of confluence of thought and language, because the ternarity is expressed in a certain form, a certain manner of thinking, of speaking the world, a certain way of putting man's action on the world (Duby 1980, 6). The trifunctional theory is the consciously making choices of the human mind among its latent riches (Dumézil 1986, 210). "Thirty or forty successive generations have imagined social perfection in the form of trifunctionality. This mental representation has withstood all the pressures of history. It is a structure." (Duby 1980, 5). This is what can explain the strength of such a design.

The structure (framework) of the conception should be based on a trifunctional model, where its three parts are internally connected, interdependent and require thinking in action. With the correct understanding of each part, the entire historical future sustainability of the state is linked. Take, for example, the conception of ratio status (*raison d'Etat*, *ragion di stato*, *reason of state*), found as early as in ancient writings as the Ciceronian 'ratio republicae'. However, as a political conception it was really introduced to us by Giovanni Botero. Already in its definition he presented it in the form of a trifunctional model. Botero in his treatise gave 'ragion di stato' such a definition: "Reason of state is knowledge of the means suitable to found, conserve, and expand dominion." (Botero 2017, 4). Thus, he declared the foundation, conservation, and expansion of dominion as the three parts of the conception. However, he believes, one of the functions of the conception, namely conservation, still designates more than the other two (Botero 2017, 4). Therefore, he understood the conception of reason of state as a justification of the sense or rationality of conservation of the sustainability of the state in the conditions of chaos and constant struggle for dominion.

Armand Jean du Plessis, known to us as Cardinal Richelieu, took Botero's function of conservation as a basis and derived a new trifunctionality for the conception of the *raison d'Etat*. In the midst of chaos, religious strife, and struggle for dominion, a way had to be found to conserve the state by giving this conservation meaning. Richelieu understood the conception of *raison d'Etat* not as the defence of national interest, but as the search for meaning in the conservation of the state and delivering it to each person. Richelieu saw the destruction of Christian society due to the lack of unity among Christians. Changing the nation's perception of time and space in a new way binds together human solidarity, itself and the process of its perception in space and time (Anderson, 2016). He realized that the conservation of state and society was not practicable without imagination creating a new collective tie. To exist at all, all communities must be imagined (Fields 1995, xxxiii). The value character of this connection for the state and for society lies in their convergence in moral and value unification in a manner similar to Durkheim's "one single moral community" (Durkheim 1995, 44). He therefore sanctioned two systems of morality - one for the individual and one for the state - thus completely secularizing the conception of reason of state, stripping it of all moral and religious considerations<sup>\*\*</sup>. He no longer saw God as a compromise figure in the Christian and religious state, since everyone believed

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<sup>\*\*</sup> Catholic France sided with the Protestants in the Thirty Years' War.

that only they were allowed to speak in God's name. At the same time, he saw that, after numerous attempts and assassinations of French kings by religious fanatics, the Botero prince-state axis was no longer working, but was only destroying the state. The state, unlike the king, is not a closed system, but a constantly expanding and changing system. Man, too, is in essence an open system and just as expanding and changing. Since the prince-state axis was losing strength and even in Botero was unclear (Botero 2017, note 1), Richelieu favoured the man-state axis. He realized that the forces of chaos and struggle within the state could not be stopped or completely ceased, but that they could be harnessed. Only two ways of implementation were possible at the time: to make the state more organized, thereby reducing the chaos within it, or to take the chaos within the state to the outside. These two ways reduced entropy and allowed for less policy uncertainty. Richelieu, having suppressed internal enemies, made the state more organized to suppress external enemies and threats. Guided by political necessity rather than moral principles, he gave concrete meaning to the reason of state for France. What led Richelieu to this conception of *raison d'Etat* was his observation of French political life and the chaos it produced. Thus, Richelieu observed that while the political nature of the state has a tendency to maximize entropy, the individual is attuned to maximize its reduction. His conception of *raison d'Etat* therefore sought to strike a clear balance between human aspirations and the political processes that were natural in nature.

In Richelieu's conception of the *raison d'Etat*, the meaning of conservation of the state is in the axis of man-state, not prince-state or nation-state. However, he adds a third functional part to the man-state axis - mortality - linking it to his new morality. The 'art of dying' is a moral lesson of renunciation to all who live, for 'Mourir, c'est prêcher un peu'\*\*\* (Duby 1984, 244). Richelieu explains that the salvation of a man who has an immortal soul occurs ultimately in the next world and so it is not surprising that he should answer before the judgement of God there, while the state is mortal because it has no life in the next world but only in this one. The salvation of the state is either in the present or nonexistent. Consequently, upon the salvation of the state, the human being must be responsible for its conservation immediately in this world as well. The punishments that are necessary for the survival of the state may not be postponed (Richelieu 1858, 195; Rehman 2019, 47). Richelieu's main message is that if the state is not salvaged today, it will no longer exist tomorrow. It should be understood that the third function in the trifunctional model of Richelieu's conception is the most complex. Richelieu, by including mortality in the axis of man-state created the expected imbalance, which creates a tough competition in the choice of human actions, and at the same time created the very compensatory opportunities, which were lacking for the realization of internal political balance.

Another thinking tool in the conception of counterstruggle is the existence of compensation opportunities. Any conception should take into account that the state is like a living organism and its policies should respond to any changes in the internal and external environment. The state always has strengths and weaknesses, so the management process supports the weaknesses at the expense of the strengths. In the

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\*\*\* To die is to preach a bit.

conception of counterstruggle with the help of controlling three factors it is possible to understand what are the strengths and weaknesses. However, it is not always possible to improve the weaknesses to the level we want. Therefore, we need to work on compensatory capabilities. Just as a blind person has compensatory capacities when their hearing and tactile senses are enhanced.

Practically any conception or system of views should have compensation mechanisms that ensure adaptation of the state, all its governing bodies and the system of power as a whole to changing conditions of the environment (changes in the world and regions, changes in the policies of partner states, impacts of negative factors, etc.). However, compensation cannot be long lasting, because, as a rule, it leads to the fact that work with a higher load becomes the cause of weakening of the parameters of the strong factor and causes vulnerability of the system as a whole. The weakened state of the parameters of the strong factor can cause deterioration, due to exceeding the compensation opportunities, of any balanced system. It is also necessary to take into account that in the process of compensation there arise besides real, also ephemeral threats, on which forces can be diverted. Unfortunately, the defence mechanism in the form of compensation of lacks of a weak factor reacts to real and ephemeral problems in the same way. Such errors are possible because of constant rivalry and competition, where not only deception is used, but constant misleading of one's adversary or competitor. This is an integral part and primary goal of any counterstruggle, which includes hybrid warfare.

Compensation or compensation opportunities allow the system to adapt in conditions of abrupt changes in the environment and to adjust to the emerging negative consequences. The balance of the system formed in this way sooner or later ends with the depletion of functional capabilities of the strong factor. The solution of this problem depends on the possibilities of strengthening the parameters of the weak factor in the process of such adaptation and the level of depletion of the source that consumes the weak factor.

If we consider the normal state of the state in a normal external environment as an equilibrium, then the impact of external and internal factors takes the state or some of its governing bodies out of equilibrium, and compensation mechanisms restore equilibrium by making certain changes in the work of governing bodies or changing them. Let us imagine such a situation. Existing flaws in domestic policy activate the discontent of citizens, putting a constant significant burden on law enforcement agencies. Solving this problem only with the use of compensatory possibilities leads to hypertrophy of governing bodies. In this case, the suppression of citizen discontent by law enforcement agencies compensates for the disorganization of governance, but increases the burden on them, creating a new threat. Such a temporary solution to the problem can only buy time to solve the problem, but cannot be considered acceptable. Temporary, because compensation does not balance the qualitative side of the problem, much less its subjective side. Unacceptable because it continues to upset the equilibrium.

Another thinking tool in the conception of counterstruggle is the maintenance of equilibrium (balance) of all factors in accordance with a certain goal. Equilibrium or balance is the state of an equilibrium system, the impact on which is compensated or

absent at all. For any conception, sustainability, and most importantly, increasing sustainability, is very important for understanding what is required for the state and society to fulfil its interests. The vulnerability of the state and society is nothing but the vulnerability of their interests.

Hybrid threats, for example, affect different sectors of society in different ways and to different degrees. Threats per se are not as dangerous as vulnerability, where the impact of force can be directed without proper counterbalancing by another force. If state policy does not aim to counter hybrid threats in the most vulnerable sectors, the equilibrium in society becomes unstable. Critical infrastructure, the economy and the military have many vulnerabilities that reduce resilience. State policies are forced to engage in issues of resilience building, which makes vulnerabilities an obvious argument in any competition to face the rival.

Herbert Spencer believed that the conflict of forces not in equilibrium results in rhythm. Rhythm is the excess of forces in one direction, which is not constant, because “every further transfer through space must alter the ratio between the forces concerned—must increase or decrease the predominance of one force over the other—must prevent uniformity of movement” (Spencer 1862, 317). The rhythm in politics is the rhythm of struggle. Everything strives for equilibrium, but it is constantly disturbed by the counteraction of an opposite force. In politics, all forces are in motion, so balanced motion is more important than static equilibrium.

### **Basic idea of conception of counterstruggle**

Politics and economy interact and collide among themselves much wider than our usual perception. Their interrelationship is the interaction of various forces both within and between societies. However, because of the complexity of analyzing the relationship between politics and economy, in political economy the analysis is usually simplified to the relationship between state and market or power and wealth. Analyzing the relationship between state and market or power and wealth attempts to solve narrowly focused problems. This leaves out of consideration the problem that forms the basis of any rivalry - how to overcome the opponent's force and/or impose one's will on it. The solution to this problem is embedded in the complex relationship between politics and economy. To understand this we need to define what is the relationship between politics and economy? This ratio indicates their common interrelated managerial nature of decision-making affecting people's livelihoods. Such a correlation has an inverse relationship. So, for example, what will be the cost of the tombstone of a deceased family member is determined depending on family policy, since it is impossible to return these costs, let alone make a profit from it. In fact, family policy decides how to allocate economic resources in such cases. Also, most state expenditures for political purposes cannot be recovered economically. And such vivid examples, can be military, cultural and grant aid expenditures. From this we can conclude that the relationship between politics and economy is rooted in their inverse relationship.

Therefore, taking the relationship between politics and economy as a basis, we will assume that the existing strong dependence between politics and economy will always

be inverse. That is, if something is gained in politics, something is diminished in economy and vice versa. We also recognize that neither politics nor economy can exist in a pure form, as policy impacts or economic changes occur over time and under different circumstances.

Such an inverse dependence when modelling their actions political actors should take into account the following: when trying to achieve a certain result in politics, it is necessary to find some economic result that must be sacrificed. And vice versa, if one is trying to achieve economic success, one should look for where to concede in the political sphere. However, we notice that a number of countries are strong both economically and politically. And the concessions and losses, although they appear, remain unnoticed or do not affect at the moment. We will try to give our explanation for this.

We know that the inverse relationship is expressed by the formula  $P = \frac{k}{Ec}$  or  $Ec = \frac{k}{P}$ , where  $P$  is the policy,  $Ec$  is the economy, and  $k$  is the coefficient. This formula means that an increase in one parameter leads to a decrease in the other parameter as much and vice versa. However, in the real ratio of politics and economy everything is not so simple, because there is also a qualitative component of the coefficient. Since the coefficient in the numerator adjusts the result, which is closer or further away from zero. If we plot the graph, we see that with a coefficient less than 1, the curve lies closer to 0. This means aggravation, i.e. more loss with less gain, but when the coefficient is above 1, the curve lies further away from 0. This means that the situation is far from crisis. And the more quantitatively and qualitatively the coefficient is greater, the further the curve is from 0. This indicates that having such a powerful coefficient it is possible to level out most of the losses in the struggle to achieve one's goal.

It is the coefficient in this relationship that makes the situation favourable for a policy in the struggle to achieve its objective or, conversely, aggravating. The coefficient includes factors that react directly or indirectly with each change, and not always linearly. It follows that the relationship between politics and economy is in a state of functional dependence, in which an increase in a certain quantity in politics (e.g. armaments) causes a proportional decrease in a dependent quantity in economy (e.g. investment in infrastructure) and vice versa. However, this increase or decrease cannot be linear, as it is complex in structure. If the coefficient of the state is powerful enough, the decrease may not even occur for a long time.

Such a powerful factor is the counterstruggle factors, which

- their influence is not immediately apparent;
- include elements that are mathematically difficult to calculate;
- include opportunities to achieve a political goal.

This is where the problem arises. How to understand that factors are not immediately apparent and are very difficult to see, but they offer opportunities to achieve a policy goal. The lack of seeing opportunities is related to a common cognitive distortion called survivorship bias: we know all the data from survivors, but we don't have any data from non-survivors. We have to improve on what we have little knowledge of and insufficient data about. Our wrong predictions and wrong decisions lead to an inability to see opportunities that are rare and time-limited. Not to see any data and at the same time to see many data is a major asymmetry that allows us to learn

to see the underlying problems. H. G. Gadamer argued that "... that the important thing is the knowledge that one does not know. Hence the Socratic dialectic-which leads, through its art of confusing the interlocutor, to this knowledge-creates the conditions for the question. All questioning and desire to know presuppose a knowledge that one does not know; so much so, indeed, that a particular lack of knowledge leads to a particular question." (Gadamer 2013, 374). Overestimating the available data and underestimating the data that is not directly observable increases asymmetry, distorting thinking. The availability of vast amounts of information is like deception; it can distort the thinking of almost anyone and cause them to make the wrong decision. George Box, a prominent statistician of the 20th century, observed: "Just as the ability to devise simple but evocative models is the signature of the great scientist so overelaboration and overparameterisation is often the mark of mediocrity" (Box 1976, 792).

In a broad sense, counterstruggle, like war, affects people both physically and psychologically. Throughout history, counterstruggle has been involved in the creation of human societies, even when armed struggle and physical violence were absent. Competition, resistance, fighting and the desire to be first have psychologically changed both individuals and the whole society. Continuity of counterstruggle gave people the main thing, the ability to think quickly and creatively. Thus accelerate the process of development of economic and political institutions and culture. And this is true both for those who suffered physically and for those who did not suffer at all, because 'these experiences have a compelling universality, and that one would indeed have to be blind to the world's course if one wished not to have these experiences' (Adorno 2001, 104). Moreover, the point is that psychology, or thinkability, makes all the difference in how people react to war and in the kinds of formal institutions they build in its wake' (Henrich 2021, 338). Counterstruggle is a creative movement through constant struggle, which is also accompanied by resistance. This struggle appears in various forms (see Figure 2). Each form of struggle is an interaction of the will and characters of the opposing parties.

*Figure 2. Typology and spheres of Counterstruggle*



In modern conditions, counterstruggle is very often expressed through the word 'war' - although the use of this word by different authors may have different meanings. For example, cold war, hybrid war, sanctions war, economic war, etc. These word combinations are nothing but the designation of counterstruggle using the word 'war'.

Counterstruggle and war are very similar in meaning, but the semantic meaning does not always reflect the internal dynamics of struggle and resistance that underlie them. It is this internal dynamic that gives them their distinction. Christopher Blattman has observed: "The problem with analyzing wars, however, is that the same things seem to get overlooked again and again, especially the nuanced and complicated strategic logics. Private information was one of these oft-overlooked forces. Another ...is the way that shifting power dynamics make it hard for enemies to commit to a deal." (Blattman 2022). The root of the difference is in the dynamics of the situation. It does not matter what dynamics, positive or negative, it still disturbs the balance, the existing equilibrium. The speed of balance destruction has different consequences and different positions of political actors. Counterstruggle necessarily includes all kinds of struggle and resistance to the full extent, i.e. according to the principle that if you do not use it, your opponent will, but with a certain limitation. The limitation is that the actors try to shift the balance slowly, disturbing the balance insignificantly, so that it is possible to adjust to the change without serious psychological shocks and without material losses and destruction. War also includes all kinds of struggle and resistance, but it breaks all the restrictions to which the opponents could limit themselves. Here the shift in balance creates a chasm in the perception of the struggle itself, and above all a psychological one. In contrast to counterstruggle, the psychological rejection of the enemy with the outbreak of war increases the intensity of some types of struggle and greatly reduces others. The transition from the state of counterstruggle to the state of war is made when a situation of impossibility to adjust to the change occurs and one of the parties is neither willing nor able to restore the equilibrium that has been disturbed by the opponent and/or themselves. However, the irrationality of war also includes the fact that the initiator of breaking the balance or shifting the equilibrium is unable to correct the situation or adjust to such drastic changes. Irrationality and orientation to a sharp break of the existing balance is connected with the fact that the human mind is inherently irrational. This was the way of thinking of the 20th century, it is the way it is now. "We no longer believe in the power of reason over life. We feel that life controls reason." (Spengler 2016, 82). This way of thinking is intertwined in specific, historically determined situations. And at some point, a person can no longer think rationally, conceptually, or even consciously because his ego shields him off from his feelings of guilt (Peters 2014, 151).

If we take Ludwig von Rochau's idea of *realpolitik*, it turns out that the starting point of all political knowledge begins with the conclusion that the law of survival of the fittest plays the same role in the life of states as the law of gravitation in the material world. And the main thing here is not only to realize this, but also to draw the right conclusion that the right of the stronger and the real power of the stronger are not equal. Equalizing them in the actions of the state becomes the cause of gross mistakes and serious defeats (Rochau 1859, 1). Most successfully combined the power of the state and the real power of the strong Otto von Bismarck, who for the sake of

preserving peace, was ready to share and bargain this power. «He was famed for his efforts to find negotiated solutions and avoid war. He even avoided exploiting German military victories, in part to lower the odds of a balancing coalition against him» (Blattman 2022, Ch. 5). Bismarck did not wage war primarily as an armed struggle, but as a counterstruggle, including all types of struggle, including military struggle. He successfully applied the counterstruggle theory: the balance was disturbed exactly as long as Germany was able to adjust to the change in advance or, more importantly, to do it before others. He did not take the next step until the state had adjusted to its previous one. In addition, if it failed to adjust, he retreated, sharing and bargaining for the power that his state had failed to master. Thus, he put real power above the right of the strong. His followers, however, not only failed to internalize his methods, but acted contrary to the theory of realpolitik, assuring themselves of their adherence to it. The two world wars and even the post-war conflicts are a vivid confirmation of this.

Any established world order is disrupted long before its dismantling is universally accepted. The system of international relations, which was established after the Peace of Westphalia, the Vienna Congress and the Potsdam Conference, was destroyed before the countries that recognized it began to openly fail to fulfil their obligations. That is, according to realpolitik, the real power of the centres of power is no longer sufficient to assert the right of the strong.

### **Method of analysis and evaluation of the counterstruggle framework**

People in their life subconsciously analyses and evaluates hundreds of different parameters when making a decision. All these parameters fit into just three factors: space, time and force. Throughout his life, a person analyses and evaluates situations and his environment. He does it constantly, because in his daily life he has to make many decisions all the time. The knowledge, experience, skills and abilities he acquires over time become the basis for his analysis and evaluation before making a decision. However, society likes to discuss and criticize the decisions made. Herewith, few people pay attention to the analysis and evaluation of the situation that precedes these decisions. This is surprising, because it is more important to discuss what leads to a decision.

Methods of analysis and evaluation may have errors. Accordingly, models based on them are not without flaws. ‘Models are not, however, without their drawbacks. It is just not possible to assimilate all variables of a complex event such as war. Multifarious factors such as individual attitudes, national will, and the ‘fog of war’ are outside the realm of contemporary model making’ (Konecny 1988, 46-47). To try to account for errors one should understand how one analyses and evaluates on a subconscious level. What parameters and factors help him in this?

So, let’s take the case of a person who wants to cross the street in the wrong place, ignoring the rules of the road. Obviously, as any pedestrian, he does not want to be hit by a car. Therefore, he must analyze and evaluate the situation, and predict such a model of behaviour, in which passing cars will not hit him. And this model will consist of relevant parameters that fit into the three factors mentioned above. Firstly, he must analyze the space around him. This space usually includes the following parameters:

the width of the street he wants to cross, determining the distance of the most dangerous section, the distance to the cars that are approaching his crossing point, the presence of obstacles he will not be able to overcome or a policeman nearby. Secondly, an analysis of time with the parameters included there, such as: the time he crossed the street at the dangerous section, the speed of the cars, the time available for contingencies, whether it is dark or light, what time of year it is. Thirdly, analyzing his capabilities, i.e. the power he possesses. Determining here the parameters, it should be taken into account that any person quite often tries to increase his capabilities with the help of improvised means. And this analysis usually includes relevant parameters: physical strength, availability or absence of appropriate means, clothes and shoes, as well as experience and competence, i.e. material and moral strength. There may be more or fewer parameters in the analysis of each factor, depending on the particular situation. Other parameters that the person deems important may also be included. After the analysis, the person begins to evaluate the results of the analysis of parameters and balances the factors, creating a model in his head. Such a model in our case is an anticipation of how a street crossing will be at a given location at a given time. Thus, on the basis of analyzing and assessing the situation, a person before starting to cross the street creates such a model, with the help of which he makes a decision to manage his traffic. How accurate and correct this model will be and how close to success he will be depends on the analysis and assessment of the situation at that time. In fact, any movement first originates in a person's thoughts and only then is realized in the form of concrete actions.

The models and calculations used for this kind of analysis and evaluation become basic to the human being. This is where the concept's analytical tool and its possible uses become visible. The concept, by making improvements in the area of situational analysis and assessment, leads to the development of a political-military simulation that shows the direction for changing the plan based on the strategic objective. Although a new concept may seem to lack a conceptual apparatus everywhere, there is a constant accretion of conceptual apparatus in the process of situation analysis and assessment. Accretion occurs when not only meaningful but also familiar words catch on with experience, and the shortage is felt when such words slip through. But defining concepts and terms - will not stop the scarcity and increment. The thing is, we don't always need to know the definition of a term to know what we are talking about. We just need to be in the same mindset in which specific concepts, terms, and sometimes new or half-forgotten words are used in order to understand. There are many important terms that are difficult to define but that we can still understand and use perfectly well. "This suggests that our understandings of terms are often prior to our definitions of them - and, so, that we don't always need definitions to understand each other." (McGuigan 2023). Analysis and evaluation in counterstruggle mainly involves working with existing concepts to clarify their meaning in a particular situation, previously absent or unnoticed or undervalued, to bring them into combinations with each other that are less familiar than those already established. Bringing together different and fragmented elements that initially seem poorly compatible with each other can yield less familiar, but not necessarily entirely new, combinations of scenarios.

Counterstruggle is usually existential in nature, i.e. opponents do not trust each other to such an extent that in the struggle and resistance they are ready to take significant risks, make irrational decisions, incur and inflict significant material and moral damage, as well as kill and be killed. The directionality and orientation of counterstruggle in the broad sense implies the active participation of the subject of politics, which sets the foundations and parameters of consciousness, will, feelings to create an impact on some object of confrontation. In fact, counterstruggle is not a single act at all, but a whole synthesis of acts. Any act of counterstruggle directed at an external object must find an interrelated effect on an internal object. Despite the fact that the directing of the act towards the external and towards the internal object is for different purposes, a kind of unity of method is nevertheless crystallized. However, unity does not mean balance or equilibrium, which is intractable and indefinable, since in analyzing and evaluating it is difficult to know where the culminating point is. Therefore, the basis of counterstruggle is the reality given to the human mind, something that is not given to the machine. Reflexion, as the analysis and evaluation of what is happening around us, is formed by addressing the components of reality, studying and comparing them.

Counterstruggle is a constant reflexion, but analyzing and evaluating a huge number of parameters of reality is not possible for human control. Here it is necessary to apply a procedure by means of which the huge number of parameters is reduced to three components (space, time, force) influencing reality, called factors. Each factor combines related parameters that influence the parameters of another factor. The analysis and evaluation of the space, time and force factors are more than suitable for analyzing emerging situations based on the evaluation of the information received.

The ability to make critical and diversified decisions to achieve policy goals begins with analyzing and assessing the factors that need to be balanced. An ancient Indian political treatise, Arthashastra, dating from around the first century AD (Rangarajan 1992, 20-21), expressed the wisdom of Indian civilization about the need to balance the factors of power, time and place as they reinforce each other (Olivelle 2013, 350). The ideas of the necessity of balancing factors in the treatise were expressed as follows: space, time, and force contribute one to the other; when one excels in space, time, and force, then proceed to consider something else; if one wishes to win, one should not embark on a campaign without grasping the strength and weakness of both one's own and the enemy's in relation to space, time, and force (Olivelle 2013, 349-52; Rangarajan 1992, 625).

As we can see, the idea of balancing the factors of space, time and force has been known since ancient times. The author of the treatise Arthashastra considered force, time and place useful in the performance of any activity (Bisht 2019, 114; Kautilya 1992). It is considered a book of political realism rather than powerless idealism and analyses how the political world works and rarely how it should work and this works better in practice to preserve the state and the common good (Boesche 2002, 17).

Once a political objective has been defined, the factors of space, time and force must be balanced against it. This means that you will need to interrelate these factors in such a way as to enhance your freedom of action and make it more difficult for your opponents. By analyzing and evaluating the factors individually, it is necessary to

understand how you will balance them in combination with the relevant objectives. The most notable example of someone who had the ability to correctly balance the factors of space, time, and force with a given objective was Napoleon I.

Each factor includes a number of parameters, which are the constituent elements of the factor. Also in each factor, the parameters are divided into objective and subjective. In this context, the following most important parameters that require constant monitoring can be identified:

- 1) *Space (one near the other):* 1.1) Physical (objective) space: Geographic space; Location and maps; Air and outer space; 1.2) Mental (subjective) space: Social space (including media space and cyberspace); Private (personal) space; Linguistic space (language distribution).
- 2) *Time (one after the other):* 2.1) Quantitative (objective) characteristic (metrized duration): Real time; Speed; Tempo; Time of day; Seasons; Century, epoch; Term; 2.2) Qualitative (subjective) characteristic (non-metrized duration): Temporality; Irreversibility; Continuity; Unidimensionality; Connectedness; Symmetry; Logical time.
- 3) *Force (one changes the other):* 3.1) Material (objective) forces (military, economic, financial, etc.): Reserves; Armed forces; Armament and military equipment; Technologies; Economic resources; Currency; Human resource; 3.2) Moral (subjective) forces: Ratio of forces; Moral forces; Intellectual forces; Governance (degree of centralisation and decentralisation); Literacy and competence; Mentality.

Parameter analyses should start with quantifiable parameters, i.e. objective parameters. First we analyze the objective parameters of space, then time and only at the end force. After that we proceed to analyze subjective parameters of space, time and force respectively. Subjective parameters occupy a special place in the analysis because they are not quantifiable and are difficult, and sometimes impossible, to estimate with any degree of certainty. These parameters involve so much uncertainty, variability, complexity and lack of precision. Subsequent factor estimation is done by taking into account the parameter analysis followed by balancing the evaluated factors with the goal. Factor evaluation should be done in pairs: space-time, space-force, time-force. The evaluation of factors is carried out in these pair combinations, after which there is an alignment with the strategic goal to be achieved. And when balancing the factors with the goal, space-time-force should go in sequence. However, a significant change in one of the factors will inevitably upset the overall balance and require a reassessment of all factors. This requires periodic monitoring to balance the factors with the goal. Also, any change in the goal will require a rapid reassessment of the relevant factors and their equilibration with the newly defined goal.

The correct evaluation and balancing of space, time and force factors is the most complex process. The following aspects should be emphasized in the success of achieving the balance of space, time and force factors: 1) a correctly set goal; 2) realistic analysis and evaluation of the factors; 3) correct analysis of the key parameters of the factor; 4) maximum freedom of action; 5) filtering the flow of information; 6) formation of one's own agenda; 7) rational decision-making; 8) control of

interrelations of factors in planning; 9) lack of one factor, replace with another; 10) change of one factor disrupts the balance; 11) if you don't have your own balance, destroy your opponent's balance.

### **Conclusion and discussion**

The famous phrase of the Roman politician Cato the Elder ‘Ceterum censeo Carthaginem esse delendam symbolizes’ perseverance and intransigence. This insistence by a politician of the Roman Republic to fight an opponent or obstacle called for the destruction of the foundations of danger. Nowadays, the use of the phrase is used as an implicit reference to the need to destroy the established status quo long before it becomes apparent. In any status quo, there is always a group of countries that did not participate because they remained outside the brackets of the fundamental treaties on world order. As a result, the balance of the post-war world is inevitably destroyed and a situation is created in which the actions of the guarantors of the post-war world can be described in the words of Isocrates ‘With those things in which I have skill the time doth not suit; and in those things with which the time suits I have no skill’ (Plutarch 1878).

The contemporary political situation reflects the disturbed balance of the post-war world, creating uncertainty for policy makers and an uncertain future world order. In the context of uncertainty, where it is difficult to identify the changing environment, the concept of counterstruggle provides a tool for assessing the situation and subsequent planning at all levels. The constant monitoring and balancing of space, time and force factors is a prerequisite for the conduct of struggle, especially when there is a high degree of uncertainty in the counterstruggle process.

The main problem with forecasting and planning is that people tend to solve those problems that they know how to solve. So they tend to start solving secondary problems instead of the most important ones. Moreover, to be successful, you need to solve the most difficult ones, which are usually the most important problems. Counterstruggle theory allows us to see the basic components that help in solving basic and complex problems. The factors of space time and force through evaluation and calculation help to solve the most important problems and, as a rule, the most difficult ones. In addition, balancing them with a strategic goal makes it possible to escape from constant uncertainty and to implement more sustainable policies and strengthen the economy. This is not a one-off operation, but an ongoing process.

### **Supplementary material**

The supplementary material for this article can be found at  
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The author declares no ethical issues or conflicts of interest in this research.

**Ethical standards**

The author affirms this research did not involve human subjects.

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## GRIDLOCKED STREETS OR SIMPLY DISINTERESTED? URBAN YOUTH AND UNCONVENTIONAL POLITICAL PARTICIPATION IN ZIMBABWE'S SECOND REPUBLIC

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### Abstract

This paper is situated in the political landscape of Zimbabwe's Second Republic, which many believed would usher in a new era of democratic governance. It examines urban youth and their engagement, or lack thereof, with unconventional modes of political participation. Utilising focus groups conducted in Harare and Bulawayo, findings reveal how young people engage with political issues through internet-based platforms and novel artistic expressions. While internet participation offers a space to the largely digitally savvy youth for critique and dialogue, it often fails to translate into tangible policy changes or meaningful impact, highlighting a sense of futility among the youth. Despite these creative outlets, findings also indicate a significant reluctance to participate in other traditional forms of protest, such as demonstrations or strikes, largely due to fears of police reprisals and the threat of lawfare. Life cycle factors, especially the economic situation, also deter further participation, as youths prioritise economic sustenance over political activism. The transition from Mugabe to Mnangagwa has not yielded the anticipated democratic dividend; instead, the political landscape remains unchanged, characterised by an enduring authoritarian culture. The pervasive use of lawfare and state security apparatus continues to deter young people from exercising their constitutional rights as outlined in Sections 58 (freedom of assembly and association), and 59 (freedom to demonstrate and petition). Unconventional participation can only thrive in an environment where constitutionalism is respected, thus the need for genuine commitment to democratic principles in Zimbabwe.

**Keywords:** youth, political participation, democracy, protests, demonstrations.

### Introduction

The political landscape in Zimbabwe has undergone a notable transformation since the ousting of long-time leader Robert Mugabe in a coup in November 2017. This pivotal moment marked the end of a 37-year rule characterised by economic decline, political

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repression, and social unrest and also ushered in a new era, the Second Republic, which was meant to be a new and unfolding democracy (Phulu and Kamga 2023). This Second Republic, led by Emmerson Mnangagwa, sought to project an image of renewal and reform; however, seven years down the line, the realities on the ground reveal less hope and more disillusionment. Amidst this backdrop, the role of urban youth in shaping the political narrative has emerged as a critical focal point, raising questions about their engagement, motivations, and the forms of political participation they endorse.

Youth, defined by the Zimbabwe National Youth Policy<sup>1</sup> as individuals aged between 15 and 35, constitute a significant demographic in Zimbabwe (67.7% according to the Zimbabwe Human Rights Commission), particularly in urban centres where they represent a substantial portion of the electorate (for those who are between 18 and 35). Historically, this group has been at the forefront of political movements from the period of the struggle against colonialism to the post-independence struggles, often catalysing change through protests, activism, and grassroots movements (Makwerere 2019; Sigauke 2020). However, the youth's relationship with traditional political structures has been complicated. While youth possess the potential to influence policy and governance, many young Zimbabweans express disenchantment with established political parties, viewing them as relics of a bygone era that have failed to address their needs and aspirations (Flam 2023; Balcı and Balcı 2011).

Studies demonstrate that while youth in Zimbabwe have a keen interest in politics, they are disengaged in formal or conventional politics which largely centres around electoral participation (Raftopoulos 2013; Masuku and Macheke 2021; Masunda 2023; Musarurwa 2018). This disinterest raises serious questions about the nature of political participation in Zimbabwe's 2nd republic and the avenues through which urban youth engage with the political process. The importance of youth in political participation cannot be overstated. Their experiences, shaped by high unemployment rates, economic instability, and limited access to quality education and healthcare, inform their political attitudes and behaviours (Musarurwa 2018; Ndebele and Billing 2011; Masunda 2022). As a result, youth in Africa and globally are increasingly exploring unconventional forms of political participation that transcend traditional voting and party affiliation (Ani and Okoye 2021; Nyatuka and Wolhuter 2023; Isaksson 2014; Kitanova 2019). This shift is indicative of a broader trend where young people seek to assert their agency through alternative channels, such as social movements, digital activism, and community organising. This trend is essential for grasping the evolving political landscape in Zimbabwe.

This paper seeks to address the central research question: How do urban youth in Zimbabwe navigate the political landscape in the post-Mugabe era, and what form(s) of political participation do they engage in? In addressing this question, it is important to consider the historical context that shaped the current political climate. The legacy of Mugabe's rule, characterised by authoritarianism and the suppression of dissent, left deep scars on the collective psyche of the nation (Hlungwani et al. 2021; Young 2019).

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<sup>1</sup> Ministry of Youth, Sports, Arts and Recreation of the Republic of Zimbabwe. 2019. "National Youth Policy 2020-2025." Accessed May 10, 2024. <https://zgc.co.zw/wp-content/uploads/2022/10/NATIONAL-YOUTH-POLICY-2020-2025.pdf>.

Many Zimbabweans belonging to the millennials and generation Z cohorts grew up in an environment where political participation was fraught with risks, leading to a pervasive sense of cynicism towards formal (electoral) political processes. The aftermath of the first post-Mugabe elections in 2018, which were marred by allegations of fraud and violence (Mungwari 2019), further exacerbated feelings of disenfranchisement among the youth. As a result, many young people have turned away from traditional political participation.

The advent of the Fourth Industrial Revolution has seen the rise of social media and digital platforms, which have played a pivotal role in reshaping political participation among urban youth. In an era where information is readily accessible, young people globally are leveraging technology to mobilise, organise, and advocate for change (Arora et al. 2022; Gibbons and Poelker 2020). In Zimbabwe, movements such as #ThisFlag and #ZimShutDown during the Mugabe era demonstrated the power of digital activism in galvanising public opinion and challenging the status quo (Gukurume 2017). These platforms provided space for young people to express their grievances and facilitate connections across diverse groups, encouraging a sense of solidarity and collective action.

### **Conceptualising political participation**

Political participation is a fundamental concept in democratic societies, referring to the ways in which individuals engage in the political process to influence decision-making and governance. It encompasses a wide range of activities, from traditional forms such as voting, campaigning for candidates, and joining political parties, to more contemporary and unconventional methods. The essence of political participation lies in the active involvement of citizens in shaping the political landscape, voicing their opinions, and advocating for their interests and rights (Macheke 2021; Ingwani and Kwaramba 2023). This engagement empowers individuals and builds a vibrant democracy where diverse perspectives contribute to policy formulation and community development.

The landscape of political participation has undergone significant transformation, driven by various social, economic, and technological factors (Mabhanda, Mabwe and Mashiri 2024; Gwindingwe 2023; Jena et al. 2023). Traditional forms of political engagement, while still relevant, have been complemented and, in some cases, supplanted by unconventional modes of participation. This expansion can be attributed to the growing disillusionment with established political institutions, particularly among younger demographics who often feel marginalised by conventional politics (Malafaia et al. 2021; Sloam and Henn 2019; Mhiripiri 2015). As a result, individuals are seeking alternative avenues to express their political views and effect change.

### **Unconventional political participation**

Since the 1970s, previously ignored forms of political participation have been recognised and labelled as unconventional, informal and novel. Unconventional political participation refers to forms of political engagement that deviate from

traditional or institutionalised modes, such as voting or running for office. This type of participation often emerges in response to perceived inadequacies in conventional political systems, providing alternative avenues for individuals and groups to express dissent, influence policy, or advocate for change. Unconventional political participation can manifest in various forms, including protests, civil disobedience, and the use of social networks for political mobilisation. These activities are often characterised by their innovative, non-institutionalised nature and can be seen as both a response to and a critique of existing political structures. A few of the unconventional modes are highlighted hereunder.

Unconventional participation often involves activities outside formal political institutions, such as protests, strikes, and boycotts (Pitti 2018; Grace and Danfulani 2015). These forms of participation are frequently innovative, challenging traditional norms and practices within political systems (Pitti 2018). In contexts where traditional avenues are inaccessible, individuals, particularly marginalised groups, utilise social networks to engage politically, as seen in rural Egypt (Hussein 2022).

The rise of the internet and social media has revolutionised political participation. Digital activism allows individuals to mobilise, organise, and advocate for change through online platforms. Movements like #BlackLivesMatter, #MeToo, and #ThisFlag in Zimbabwe exemplify how social media can amplify voices, encourage solidarity, and challenge prevailing narratives (Gukurume 2017; Ray et al. 2017). Digital spaces enable rapid dissemination of information and facilitate connections among diverse groups, empowering individuals to advocate for social and political change without the constraints of traditional political structures.

Grassroots activism is one mode of unconventional political participation which involves collective action at the community level, often initiated by individuals who feel discontented with the political status quo. These movements can address a wide range of issues, from environmental justice to human rights (Akihiko 2024; Chiumbu and Munoriyarwa 2023; Ruhanya and Gumbo 2023). By organising protests, rallies, and community meetings, grassroots movements mobilise citizens to demand change and hold authorities accountable. Examples include the environmental movement led by youth activists like Greta Thunberg, which has galvanised global attention towards climate action (Jung et al. 2020).

Relatedly, public protests and demonstrations serve as powerful tools for expressing dissent and advocating for change. They provide a platform for individuals to collectively voice their grievances and demand action from those in power. Historical examples, such as the Civil Rights movement in the United States and the Arab Spring, illustrate how protests can catalyse political and social change (LeBas and Young 2024; Ruhanya, Matsilele and Gumbo 2024; Malila and Pela 2020; Uldanov, Jakubiak and ait El Caid 2019).

Community organising, on the other hand, involves mobilising individuals within a specific locality to address shared concerns and advocate for collective action. This mode of participation emphasises building relationships, fostering solidarity, and empowering marginalised groups (Alexander and McGregor 2013; Christens et al. 2021). Community organisers often work alongside residents to identify issues, develop strategies, and implement solutions that reflect the needs and aspirations of the

community. This approach can lead to meaningful change at the local level and inspire broader movements.

Civic engagement encompasses a range of activities that promote active participation in the community, including volunteering, attending town hall meetings, and engaging in public discussions (Adler and Goggin 2005). While these activities may not always be overtly political, they encourage a sense of responsibility and connection to the community, encouraging individuals to become more informed and engaged citizens (Okocha and Akpe 2024). Civic engagement can serve as a pathway to more direct forms of political participation, as active individuals in their communities may be more likely to advocate for political change (McCabe and Gale 2023).

Artistic expression has long been used as a means of unconventional political participation, allowing individuals to convey their messages through music, literature, theatre, and visual arts. Artists often use their platforms to critique societal issues, raise awareness, and inspire action. In Zimbabwe, for instance, musicians like Thomas Mapfumo and Winky D and visual artists have played a crucial role in mobilising people and addressing political and social issues through their work (Chitando 2024; Matsilele and Msimanga 2022; Kellerrer 2013).

Boycotts serve as another form of unconventional political participation, allowing individuals and groups to express dissent against policies or practices they deem unjust. For instance, participants may refuse to purchase goods or services from specific companies or institutions with the aim of exerting economic pressure and driving change. This collective action highlights social grievances and raises awareness about issues such as labour rights, environmental concerns, or political repression (Gwaravanda 2023). Historical examples, such as the Montgomery Bus Boycott during the Civil Rights Movement, demonstrate the effectiveness of boycotts in mobilising communities and influencing decision-makers (Balci and Balci 2011).

Additionally, petitions allow individuals or groups to express their grievances and advocate for change outside traditional political structures. Petitioners can mobilise public opinion on specific issues by gathering signatures and support, demonstrating collective demand for action (Okocha and Akpe 2024; Mateveke and Chikafa-Chipiro 2020). They serve as a tool for citizens to influence policymakers and raise awareness about social or political concerns. Petitions can be physically and digitally distributed, exploiting technology to reach broader audiences. This method empowers individuals, promotes community engagement, and challenges established norms, reflecting a shift towards more participatory and grassroots forms of political activism.

### **Factors influencing youth disinterest vs engagement**

Factors that impact youth political participation can be classified into three broad categories: Micro (age, gender, political efficacy), Meso (education, family socialisation, peer pressure, trade union pressure) and Macro (political climate, economic conditions, party structure).

*Micro factors.* Young people are often less politically engaged than older generations, with a tendency to delay conventional political participation until later in life (Guzura, Dube and Madziwanzira 2017; Waerniers and Hustinx 2024). The relationship between age and voting behaviour is sometimes described as an inverted U-shape, where younger and older individuals participate less than those in middle age (Mutasa and Ndawana 2024; Waerniers and Hustinx 2024). Youth in Africa, defined as individuals aged 18-35, generally participate less in elections compared to older age groups. This trend is attributed to a lack of political knowledge and perceived inefficacy of the electoral process (Masarurwa 2018; Resnick and Casale 2014; Zakaria 2024). However, youth are increasingly engaging in new forms of political participation, such as activism and digital engagement, which traditional measures may not capture (Muxel 2009; Camara, Banu and Abeck 2023). In non-free countries, younger Africans are more engaged in protests, while political engagement declines significantly after age 60 (Dim and Schafer 2024).

Historically, young women have been excluded from political activities, but recent movements like MeToo have spurred increased political engagement among young women (Bessant 2022). Gender disparities in political participation can be attributed to socialisation processes and societal expectations, which often differ for men and women (Tarusarira 2013; Dilts and Guerrero 2006). The intersectionality of gender with other identities, such as race, further complicates participation patterns, as seen in the differing turnout rates among young black men and women (Camara, Banu and Abeck 2023; Coll and Juelich 2022).

Political efficacy, the belief in one's ability to influence political processes, plays an important role in shaping youth political participation (Chirongoma and Moyo 2023). It acts as a motivational factor that can either encourage or deter young individuals from engaging in political activities. Young Africans often feel marginalised and excluded from political decision-making, diminishing their sense of efficacy (Sauti and Makaripe 2023; Van Gyampo and Anyidoho 2019). The digital age has also seen youth using social media platforms like Instagram and Twitter to express political views, with political efficacy being a key factor in their engagement (Multani 2024; Ampomah and Cooper 2024).

*Meso factors.* Education plays a pivotal role in shaping political participation. While the impact of education on political engagement is mixed, active learning strategies in civic education have shown promise in enhancing participation, especially among marginalized groups (Persson 2015). Higher education levels correlate with increased political engagement, as seen in South Africa, where youth with educated mothers are more politically active (Amoateng 2015).

Family discussions about politics significantly influence youth political participation. In South Africa, political socialisation through family interactions is a strong predictor of political engagement among the youth (Gukurume and Maringira 2024; Amoateng 2015). The role of family in political socialisation is also evident in Ethiopia, where family pressure and socio-centric attitudes affect youth political involvement (Zerai, Dinku and Aynalem 2023).

Peer interactions are crucial in shaping political attitudes and behaviours. Engaging with peers in political discussions can enhance political awareness and participation among youth (Herzog 2023; Amoateng 2015). Social media has emerged as a platform where peer influence can be exerted, providing an alternative space for political engagement outside traditional structures (Van Gyampo and Anyidoho 2019).

Trade unions in Africa have become vocal advocates for addressing socio-economic inequalities, indirectly influencing youth political participation by highlighting issues that resonate with young people (Karreth 2018). Union membership can serve as a ‘school of democracy’, fostering political engagement among youth by exposing them to democratic practices and advocacy (Karreth 2018).

*Macro factors.* Political freedom and regime type play important roles in shaping youth political participation. In authoritarian countries, young people are less engaged in both electoral and non-electoral activities, but participation declines with age due to repressive political environments (Sabao and Nenjerama 2023; Dim and Schafer 2024). The political systems in some African countries often marginalise youth, excluding them from decision-making processes and policy implementation, which discourages their participation in mainstream politics (Van Gyampo and Anyidoho 2019; Masunda 2022).

The economic landscape, characterised by high unemployment and underemployment, particularly affects the youth, making them a critical demographic for electoral mobilisation (Zakaria 2024). Economic challenges contribute to the disenchantment of young people with traditional political structures, leading them to seek alternative forms of political engagement (Borges 2019; Ndhlovu and Santos 2022). Life cycle factors also often mean that young people have no time for politics as they are often engaged in activities to sustain their livelihoods.

On the other hand, political parties in Africa, especially liberation movements, are gerontocratic in nature; they often exploit youth for electoral gains but fail to integrate them meaningfully into party structures, leading to low levels of partisanship among young people (Zakaria 2024; Maringira and Gukurume 2022; Hlungwani and Sayeed 2018). The lack of political networks and experience among youth further limits their influence within political parties, despite their skills and knowledge (Ndlovu 2021).

### **Youth protests and demonstrations in Zimbabwe: A historical context**

Much of the unconventional youth political participation in Zimbabwe in the aftermath of independence took the form of strikes, protests and demonstrations, given that there was no social media at the time (Moyo 2024, 79-129; Mpofu 2023; Chokera, Mudzimba, Masengu and Mashingaidze 2024). Importantly, much of the activity from 1980 to about 2000 was in student demonstrations, which have always been an important feature of Zimbabwe’s political landscape. Independence in Zimbabwe in 1980 brought reforms in the education sector, where racial bottlenecks that previously existed were removed (Malunga 2022). These reforms resulted in an increase in the enrolment of black students at the University of Zimbabwe (which, at the time, was the only university in the country) (Hwami 2022; Makunike 2015; Ruhanya 2020).

Resultantly, the relationship between students and the government remained cordial for a little while. However, the increase in enrolment haunted the government a few years later as meant a corresponding increase in accommodation, student grants, and other services. These challenges became a breeding ground for protests on other national issues (Moyo 2024, 37-78). At the same time, with the ruling ZANU-PF government's increasing authoritarianism, the relationship between the government and the university students deteriorated beginning in the mid-1980s (Zondi 2011).

According to Hodgkinson (2013), three events stirred student demonstrations in the late 1980s: the anti-one-party statism agenda, the Willowgate scandal in which government ministers were accused of corruption, and the increasing heavy-handedness of the government on its critics. for instance, in September 1988, students from the University of Zimbabwe marched to the Central Business District of the capital Harare, accusing the government of having betrayed the goals of the liberation struggle. The government reacted by violently dispersing the demonstration and arresting many of the students. In the 12 months that followed this demonstration, the relationship between the government and the students' movement deteriorated significantly (Sabao and Nenjerama 2023; Hodgkinson 2013). In October of the following year, another student demonstration occurred at the university when the police attempted to arrest Arthur Mutambara, the then-leader of the Students Representative Council.

During the second decade of independence, student protests were on the rise. In 1989, the opposition Zimbabwe Unity Movement (ZUM) was formed. Its campaign was centred around anti-corruption and anti-Marxism themes, which corresponded with student issues (Raftapolous 1991). According to a UZ student leader, Mutambara (who later became Deputy Prime Minister of Zimbabwe between 2009 and 2013), students had to intensify their participation in national politics. Student demonstrations had thus become a launchpad to join national politics. Students established the Zimbabwe National Students Union (ZINASU) during the same period. ZINASU's main objective was to create a national platform for students in all tertiary institutions of learning (including the University of Zimbabwe, teacher training colleges and polytechnics) to advance the cause of good governance, democracy, and human rights issues.

In the same decade (1990-2000), several notable demonstrations took place where student participation was central. This was when the government introduced the Economic Structural Adjustment Programme (ESAP), which resulted in the social and economic hardship of Zimbabweans (Chinyoka 2023; Chattopadhyay 2000). The ZINASU, trade unions, and civic organisations organised strong resistance against the ESAP, resulting in the December 1997 national stay away and the highly subscribed national demonstrations in January 1998 (U.S. Department of State 1999). During the same year, ZINASU was instrumental in forming the National Constitutional Assembly (NCA), a civic body which lobbied for constitutional reform in the country. The government subsequently accepted the proposal for constitutional reform and initiated a constitutional review process (Hatchard 2001). In February 2000, the ZINASU, in collaboration with other civic organisations and the newly formed MDC opposition political party, successfully campaigned for a 'NO' vote to a government-sponsored

constitutional draft (Dorman 2003). Earlier, in 1999, the ZINASU was also actively involved in the formation of the opposition Movement for Democratic Change (MDC), with some of its former leaders, such as Tendai Biti, Learnmore Jongwe, and Nelson Chamisa, occupying influential posts in the new party.

Zimbabwean Youth participation in protest action between 2000 and 2014 significantly declined, mostly as a result of the suppression of human rights, especially freedom of assembly, as well as the effects of the post-2000 economic downturn. However, in 2016, non-violent youth led protest movements such as #ThisFlagMovement, #TajamukaSesijikile, #OccupyAfricaUnitySquare, and #ThisFlagMovement successfully mobilised for a two-day stayaway in protest against rising food and transport costs (Gukurume 2022). Similarly, #OccupyAfricaUnitySquare and #TajamukaSesijikile regularly mobilised protests mainly in Harare and Beitbridge. The post-2018 election period also saw largely youth demonstrations in Harare against the ZEC's delay in pronouncing presidential election results (Pikovskaia 2022; Ndawana and Hove 2023).

## **Methodology**

A qualitative methodology was used in this paper, focussing on insights derived from ten focus group discussions, which were conducted with five groups in Harare and five in Bulawayo. Each focus group consisted of 10 to 15 participants, resulting in a total of 115 youth aged 18 to 23, representative of generation Z. The focus groups were designed to facilitate open discussions, allowing participants to share their perspectives on political participation, motivations, and the barriers they face in engaging with political structures. Additionally, a literature survey was conducted to complement the focus group findings. This involved reviewing relevant scholarly publications that address urban youth political participation, unconventional engagement methods, and the historical context of Zimbabwe's political environment.

## **Internet-based platforms as an avenue for political participation**

In the urban centres of Harare and Bulawayo, Zimbabwean youth are increasingly utilising internet-based platforms to critique the government and express their political grievances. Social media channels such as Twitter, Facebook, and Instagram serve as vital tools for young people to mobilise, organise, and disseminate information regarding socio-political issues. Youth-led movements like #ThisFlag and #ZimShutDown exemplify how digital activism has galvanised public opinion and provided a platform for citizens to voice their dissent against governmental policies and actions. These platforms allow for the rapid sharing of information, enabling youth to connect, share experiences, and foster a sense of solidarity among diverse groups, thereby amplifying their collective voice. However, while these online critiques reflect a burgeoning political consciousness among urban youth, they often fall short of translating into tangible offline action. The futility of such critiques is evident in several ways. Firstly, the Zimbabwean government has a history of repressing dissent, leading to a pervasive culture of fear among the youth (Heinicke 2021).

The Data Protection and Cyber Security Act of 2021, the Criminal Law (Codification and Reform) Act of 2023 as well and the Interception of Communications Act of 2007 have been used to prosecute individuals accused of transmitting ‘fake news’. Many respondents expressed apprehension about participating in protests or demonstrations due to the potential for police brutality and legal repercussions. This fear stifles the transition from online activism to real-world engagement, as young people hesitate to take risks that could jeopardise their safety and well-being.

Some respondents had this to say:

- *I have a fake Facebook account as well as a genuine account. I only use the fake account to critique the government as I am aware that there is a law against saying bad things about the president,*
- *I know people like Fadzai Mahere have been arrested for posting fake news. So, whilst one can say things about the government online, they really need to be very careful about what they say.*

Moreover, online activism can sometimes create an illusion of participation without fostering genuine political change. The ease of expressing opinions online may lead to a phenomenon known as ‘slacktivism’, where individuals feel they have contributed to a cause simply by liking or sharing posts, rather than engaging in more impactful actions. As a result, while the critiques may resonate within digital spaces, they often do not mobilise the necessary numbers to effect change in the physical realm.

Additionally, the Zimbabwean government has demonstrated its ability to manipulate narratives and control public discourse, often dismissing online dissent as irrelevant or unrepresentative of the broader populace. This further diminishes the impact of online critiques, as they may not reach decision-makers or translate into policy changes.

### **Art, youth and politics in Zimbabwe**

Urban youth are increasingly turning to various forms of art, particularly ZimDancehall, to express dissent against the government. ZimDancehall, a genre of music that blends reggae and dancehall influences, has emerged as a powerful tool for social commentary and political expression among young people (Chidora et al. 2024). Some artists within this genre often use their lyrics to address pressing societal issues, including economic hardships, political corruption, and human rights abuses.

Through ZimDancehall and other forms of art, artists like Winky D, Baba Harare, Ricky Fire, and Awa Khiwe craft ideas that resonate with the frustrations and aspirations of the youth. Their music and poetry entertain and serve as a platform for voicing grievances against the government (Chidora et al. 2024). For instance, Winky D’s tracks often highlight the struggles faced by ordinary citizens, capturing the sentiments of disillusionment and anger towards political leaders (Matsilele and Msimanga 2022). The catchy beats and relatable lyrics encourage young listeners to engage with the political discourse, fostering a sense of solidarity and collective action.

Moreover, music videos and performances further amplify these messages, often featuring imagery that critiques the status quo. The vibrant visuals and energetic

performances attract large audiences, making ZimDancehall a potent medium for mobilising youth against governmental injustices. The genre also thrives on social media platforms, allowing for rapid dissemination of content and enabling fans to share their interpretations and reactions. However, the same artists have not been immune to alleged government harassment and, or prosecution. For instance, between 2020 and 2022 some of Winky D and Baba Harare's shows have been cancelled on the orders of authorities for unclear reasons.

### Protests and demonstrations

In this paper, it was important to establish whether young people in Harare and Bulawayo participated in demonstrations/protests against the government and whether they would ever consider doing so. From the findings, the majority of the respondents have never participated in protest action and demonstrations.

Two main reasons were put forward: fear and uncertainty of their legal right to protest. The outstanding reason which explains why most youth do not participate in protests and demonstrations is their fear of the police and army brutality toward protesters and demonstrators. As demonstrated below, participants believe that participation in protests can endanger their lives.

The respondents highlighted that:

- *If I am to go and protest, I must have a fat bank balance so that my parents can enjoy that money while I am in jail if I am lucky. Otherwise, I will be in the grave,*
- *I will not participate in any demonstration or protest. Look at what happened to Sikhala and Nharivhume; it shows you the futility of such actions.*

The Mugabe regime violently suppressed protests and demonstrations. This has been the case even after Emmerson Mnangagwa came to power in late 2017. The post-2018 elections saw seven people being killed; another seven had gunshot wounds, and another 274 human rights violations were committed. This created an uneasy situation wherein the government eventually appointed a commission of enquiry headed by former South African president Kgalema Motlanthe to investigate the causes of the violence and make recommendations (U.S. Department of State 2022; Zimbabwe Human Rights NGO Forum 2024, 4; Human Rights Watch 2019). The commission recommended that the perpetrators be prosecuted be brought to book - none thus far has faced justice. In January 2019, another violent demonstration against rising food and fuel prices occurred mostly in Harare and Bulawayo where security forces allegedly killed 17 citizens, 17 cases of rape committed, and 26 abductions. A total of 1803 violations of human rights took place (Zimbabwe Human Rights NGO Forum 2024; Amnesty International 2023; U.S. Department of State 2023). The case has been the same with the 2023 elections which were also marred by cases of politically motivated violence.

Some of the respondents had this to say:

- *I have never participated in any demonstration before. I saw some people in Tshabalala blocking roads in January 2019, but I chose to*

*stay indoors, and that turned out to be a wise move because the police later came for them, and some are still in jail as we speak,*

- *I watched the 2019 demonstrations from a distance. The challenge was that the demonstrations did not have any leadership. The leaders were talking on WhatsApp and Facebook. At the end of it all, Chamisa and his leaders were not arrested or dead. It's the ordinary poor people. So I have learnt that politicians can use you for their own mileage.*

The right to demonstrate is enshrined in Section 58 of Zimbabwe's Constitution. Section 59 of the Constitution states that every Zimbabwean has the right to demonstrate as long as they do so peacefully, without infringing on the rights of others. However, the government has often used the law, namely the Maintenance of Peace and Order Act (MOPA) (previously the Public Order and Security Act), to block protests and demonstrations.

Some of the respondents had this to say:

- *The problem is that our government does not recognise our rights to go and demonstrate,*
- *In Zimbabwe, politics starts and ends with votes. All of these other things are not allowed. So mine is to vote. If we win, we win; if we lose, we try our luck in the next election,*
- *As I said before, we are not in Europe here. Some of these things do not work here. I will not put my life at risk by joining such activities.*

The police argue that the law allows them to authorise any intended demonstration, while some legal experts claim that the law only states that the police must be notified. As such, MOPA has been used to bar people from demonstrating, with the opposition arguing that this is an abuse of the law. As of July 2023, a month before the harmonised elections, Zimbabwe's main opposition party, Citizens Coalition for Change (CCC), has had nearly 100 of its election campaign rallies and demonstrations banned by the police for what the CCC categorised as petty reasons (Matiashe 2023).

Although the majority of the respondents did not participate in protests and demonstrations, two of the respondents opined that protests and demonstrations could effectively work in Zimbabwe on the condition that they were organised in the same manner as during the Arab Spring or some protests that took place in South Africa where there was mass mobilisation.

Some of the respondents had this to say:

- *While I have not participated in demonstrations, I do think they work. We need the mentality of South Africans. The problem is that if anyone calls for a demo, only a few people go, and they easily get harassed. If we all go do you think they are going to kill us all?*
- *Politicians just want us to demonstrate for them while they are in the comfort of their homes. They call for demonstrations, but you do not see them. Go to Egypt or South Africa, Malema will always be in front. Even during the Tsvangirai days, we knew he would lead and get beaten up, but the problem now is that we have cowards of leaders.*

## Participation in a strike

Strike action is a form of political participation that workers in Zimbabwe have used from colonial times to the present. A distinction must be drawn between industrial strikes that take place at individual companies, organisations, and corporations and strikes by public servants which demand the attention of government in one way or another. For instance, in the late 1990s, there was a two-week civil service strike, followed by another two-month strike by junior doctors and nurses (Dansereau 1997). Doctors and nurses have recently engaged in strike action. In 2019, 2020, and 2021, doctors and nurses went on strike, protesting over poor salaries as well as the unavailability of personal protective equipment in the advent of COVID-19. As noted before, such strike action has been met by the government's brutal force and suspensions and dismissals from work of perceived ring leaders and some participants. Given the frequent strikes that occur in Zimbabwe, employed participants in the focus groups were asked whether they have participated in any strikes (Mutema 2023).

The most common reason for striking was low salaries. At the same time, some participants highlighted fear as a reason why they would not participate, given the response of the security sector which is often brutal. A participant who was a teacher acknowledged having participated in a strike over salaries, though others were reluctant to participate, even though they noted the issue of salaries, which would have made them participate if it was safe to do so.

*I am a teacher, and I have participated in a strike before. As civil servants, our salaries are very low, so yes, I joined after the Zimbabwe Teachers Association sent messages to say we should not open schools last term. However, the headmaster reported us to the district, so money was deducted from my salary. Now, the option is to just go to work and not really do the work. Let the parents do it.*

The fear of arrests and political harassment associated with strikes appeared as a reason why most respondents in the working groups would not participate in strike action.

- *I have seen those guys from the Zimbabwe Congress of Trade Unions and Rural Teacher's Association languishing in prison. As a civil servant, I can't participate in a strike. Those big guys can hire lawyers, but if we are arrested, who will represent us?*
- *Strike action almost always attracts the police. The police in Zimbabwe do not negotiate with anyone; they use violence to quell down even peaceful protests.*

Previous strike action by teachers and nurses resulted in the participants being openly assaulted by riot police and being detained and charged for disruptive behaviour (Pigou 2019, 3).

## Signing of petitions

Signing petitions is the most open, transparent, and effective way of involving the public in political participation, and is attractive to young people. Petitions have been used in numerous instances in many countries of the world. For instance, in Britain, Downing Street e-petitions have become a common tool used by citizens to communicate with politicians on policy issues (Wright 2015). Scholars like Yasseri, Hale and Margetts (2017) observe that the advent of social media has popularised petitions, although they also acknowledge that 99% of petitions do not succeed.

In Zimbabwe, individuals like Eve Charumbira solicited citizens to sign an e-petition that called for the UN and SADC to intervene in the political crisis in Zimbabwe after the killing of civilians by security forces in August 2018. Given the availability of social media and the ease of signing an electronic petition (e-petition), respondents were also questioned about their involvement in signing petitions to raise political issues (Ndlovu, Mtetwa and Makina 2021). However, most focus group participants, regardless of gender, age, education, and employment status, opined that they had not signed a petition before. The reasons vary, ranging from unawareness of what a petition is, its function, and whether it is successful. For example:

- *I do not know what a petition is; I have never seen one.*
- *I have not come across a petition before, but I think I would consider signing one if it speaks to issues dear to me. To me, it sounds like a safer way to express an opinion.*
- *Does it even work? If the government cannot listen to people demonstrating on the street, and actually responds by killing them, how about a piece of paper with some signatures?*

Two respondents confirmed having signed a petition before. These respondents demonstrated an understanding of the usefulness of a petition in raising an issue for attention. However, the issues they were attending to were not necessarily cause-oriented issues directed at the government or those seeking government intervention.

- *At my workplace, we had a number of issues resolved by signing petitions. Bosses are afraid of petitions because they show strength in numbers. I think it would work if, for example, the whole of Hillside suburb were to sign a petition against the non-collection of refuse by the city council.*
- *When I was at Teacher's College, we signed a petition against a lecturer who was sexually harassing female students.*

## Boycotts

A distinction must be made between political and consumer boycotts. Political boycotts refer to the refusal to cooperate, usually with a government, over a political issue or event such as an election or policy (Bingisai 2023; Beaulieu 2006). For example, in Zimbabwe, Morgan Tsvangirai withdrew his candidature in the June 2008 run-off election, which forced Robert Mugabe to engage Mr. Tsvangirai as Mr. Mugabe then

faced legitimacy challenges (Ploch 2008). Parliamentarians from the opposition MDC and CCC also often boycott parliament, especially when the president appears for his State of the Nation address. Similarly, students across tertiary institutions of learning, such as the University of Zimbabwe (UZ) and the National University of Science and Technology (NUST), boycotted lectures in protests against Mugabe's resistance to calls for his resignation. In particular, at the UZ, students gathered outside the exam halls, singing and briefly forcing the cancellation of exams (Harrison 2017).

On the other hand, consumer boycotts refer to not buying specific goods and services as a way of showing displeasure in the actions of the producer of the goods or provider of the services (Mhuru 2023). Some respondents have been involved in consumer boycotts, but this is beyond the scope of this study.

Gender clearly stood as a factor that distinguished political participation between male and female youth through boycott activities. The respondents who opined that they had participated in both political and consumer boycotts were female. The researcher sought to find out why women preferred to use boycotts compared to other forms of political participation, and the one reason that came out was safety, as shown in the view illustrated below.

According to (Stolle et al. 2005, 251; Adugu 2014, 43), it is only those who have high-income streams and those who are influential who engage in boycotts. However, this does not explain why female youth find boycotts acceptable. Boycotts are very safe.

*I highlighted earlier that I will not register to vote. That is my way of boycotting elections. It is very safe and effective, and I think it would actually make a huge difference if everyone were to boycott voting. I will be in my house with my children.*

When asked why none of the male participants had participated in boycott activities, the responses were mixed. Some felt that boycotts were not as effective, whereas others believed that they would work with better coordination.

This is what some male respondents had to say:

*I would want to be part of boycott activities, but you see that Zimbabweans are not united. So, whatever boycott action you may want to take, it will not work. I do not know of anyone who is happy with the local currency. Yet I remember at some point there was a move that we should boycott using bond notes. I felt it was a good move, but what did we do? We continued to use them.*

## **Occupation of buildings**

The last form of unconventional political participation is the occupation of buildings as a means of protest. A distinction must be drawn between the occupation of public buildings, which is mainly meant to attract the attention of government authorities to a particular issue or problem (Lopez and Bernardos 2015), and the occupation of private buildings, which may be motivated by private issues between the occupiers/trespassers and the owner of the building. In scholarly literature, the occupation of buildings is not

really a new phenomenon but one that is becoming more common in advanced democracies (Quaranta 2012). In the context of the study, one participant's view was that the occupation of buildings bordered more on criminality and would distract the cause at the end of the day.

*I do not think that would work. Looking at Mako, he anguished in jail. Sometimes you just need to make your point without committing a crime (Hillside employed youth focus group, 18-24 years).*

In the case of Makomborero Haruzivishe, a Harare-based youth, he and others forcibly locked the premises of Impala Car Rentals in Harare (Gambakwe, 2020). Mr. Haruzivishe and others went to the Impala premises to protest against the company, as it was allegedly hiring its cars to state security departments that were allegedly involved in the abductions of opposition activists.

### **Conclusion and discussion**

The research question guiding this study, how urban youth in Zimbabwe navigate the political landscape in the post-Mugabe era and the forms of political participation they engage in, reveals a number of factors influencing youth engagement and disinterest in conventional political activities. The findings indicate a significant detachment from unconventional forms of political participation largely due to a pervasive sense of disenchantment and fear stemming from historical and contemporary political repression.

The first critical finding is the youth's evident reluctance to participate in protests and demonstrations. Despite the constitutional right to demonstrate, the fear of police brutality and the potential for violent reprisals has created a chilling effect on youth activism. Participants in focus groups expressed a strong apprehension regarding their safety, citing instances of violence against protesters in the past and present. This aligns with the historical context of political repression in Zimbabwe, where government crackdowns on dissent have been commonplace. The legacy of violence and intimidation left by the Mugabe regime continues to influence youth perceptions of political engagement, leading many to view protests as futile and dangerous.

Moreover, the findings highlight that while there is a desire among some youth for mass mobilisation akin to movements seen in other countries, such as the Arab Spring, the lack of effective leadership and organisation in local protests has further diminished their willingness to engage. Youth respondents articulated a sense of disillusionment with political leaders who, they believe, exploit protests for their gain while remaining insulated from the risks faced by ordinary citizens. This disconnect between political leaders and the youth populace exacerbates feelings of cynicism and disengagement, indicating a crucial barrier to effective political participation.

Additionally, the study reveals that while some youth are aware of alternative forms of political engagement, such as signing petitions or boycotting, their actual participation remains low. The lack of understanding about the effectiveness of petitions and the perception that they do not lead to tangible change further discourage youth from engaging in this form of political activism. This reflects a broader trend

where young people, feeling marginalised and voiceless, opt for non-participation rather than engaging in processes they perceive as ineffective or irrelevant.

The findings also reveal that economic conditions play a significant role in shaping youth political participation. High unemployment rates and economic instability have led many young individuals to prioritise survival over political engagement, viewing participation as a luxury they cannot afford. This economic disenfranchisement feeds into a cycle of political apathy, as the youth feel that the political system does not address their immediate concerns. Consequently, the economic landscape in Zimbabwe acts as both a barrier to participation and a catalyst for disillusionment, further alienating youth from unconventional political processes. However, the emergence of unconventional political participation through digital activism and ZimDancehall presents a glimmer of hope. The findings indicate that urban youth increasingly exploit social media and digital platforms to express their grievances and mobilise for change. Movements such as #ThisFlag and #TajamukaSesijikile exemplify the potential of digital spaces to facilitate political expression and collective action among youth. This shift towards unconventional modes of participation suggests that while traditional avenues may be closed off, young people are finding innovative ways to assert their agency and advocate for their rights.

Urban youth in Zimbabwe represent a significant demographic, but their engagement in unconventional modes of political participation remains limited. The transition from Robert Mugabe to Emmerson Mnangagwa was anticipated to herald a new era of reform; however, the reality has been starkly different. Economic conditions have deteriorated further, exacerbating unemployment and social instability, while authoritarianism persists, stifling dissent and curtailing freedoms. As a result, many young people perceive political engagement as futile and dangerous, leading to a pervasive sense of disillusionment. Life cycle factors, such as the pressing need to secure livelihoods, further inhibit their ability to participate actively in political processes. The fear of repression, rooted in the legacy of violence and intimidation from both the Mugabe and Mnangagwa regimes, deters youth from taking risks associated with protests, activism, or other forms of dissent. Consequently, the combination of economic hardship, authoritarian governance, and a lack of meaningful avenues for participation has nurtured a climate of political apathy among urban youth, underscoring the urgent need for transformative changes that genuinely address their aspirations and grievances. Without these changes, the potential for youth engagement in Zimbabwe's political landscape remains severely constrained.

### **Supplementary material**

The supplementary material for this article can be found at

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### Ethical standards

The author affirms this research did not involve human subjects.

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## RESILIENCE OF CIVILIARCHIC DEMOCRACY IN THE FACE OF CHALLENGES AND GAPS IN EUROPEAN INTEGRATION: THE POLITICAL DIMENSION OF THE INDEX OF CIVILIARCHY

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### Abstract

The Eastern Partnership (EaP) countries face significant challenges in achieving democratic consolidation amid geopolitical tensions, authoritarian tendencies and regional conflicts. This paper examines the resilience of civiliarchic democracy as a framework to understand and address these challenges. The study employs a mixed methods approach including comparative analysis and the Civiliarchy Index to explore the interplay between European integration, democratic resilience and anti-civiliarchic forces. To identify the main principles of EU foreign policy in the EaP countries and its normative component, a qualitative targeted content analysis of official EU documentation was used. Additionally, the method of discourse analysis was used to consider the narrative regarding the participation and lobbying from the EU and European institutions and values within the EaP countries, as well as prepare for the negotiations with EU and EU member states for the interests of EaP countries. Europeanization and democratization determine both the political and social prospects for sustainable development of the EaP countries, as well as the hybrid challenges of strategic security and the dichotomy of inter-integration conflicts. The paper analyzes the gaps in European political integration in the EaP countries for the period from 2013 to 2023. The authors rely on studies on Europeanization and European political integration in the tradition of neo-institutionalism, as well as on the resilience of the EaP countries. The findings of the paper imply that the civiliarchic democracy the EaP countries face is thwarted by internal instability, external pressures and shortcomings in EU policies. But EU's strategic and engagement can in some extent tackle authoritarian trends and improve democratic institutions. Theoretical and practical insight into the concept of civiliarchic democracy and its resiliency in light of the

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democratization literature is the main contribution of the study. Policy and scholarly implications of the findings in support of improving democratic institutions and further inclusive European integration in the EaP region are suggested.

**Keywords:** civiliarchic democracy, civiliarchy, civiliarchic transformations, Europeanization, European integration, Eastern Partnership, liberal democracy, consolidation, post-Soviet populism.

## Introduction

In this article, the consolidation of democracy in the post-Soviet countries since 2013 is analyzed and challenged by the rise of interstate populism from the Russian political elite, which has created difficulties in the Europeanization and democratic transition of Ukraine, Georgia, Moldova and Armenia. In this sense, the aim of this article is to fill the theoretical gap in the political analysis of democracy and civiliarchy indicators, to employ the index of civiliarchy, and to explore the measurement of civiliarchic democracy in the context of post-Soviet interstate populism with a special focus on the challenges of European political integration of the EaP countries.

The research, of which this article forms a part, aims to provide a comprehensive analysis of the Political, Economic, Social and Cultural dynamics of civiliarchic democracy that shape the democratic transition processes in the EaP region. However, in this paper, we focus exclusively on the political dimension of the Civiliarchy Index, with the aim of providing a detailed description of all its subcomponents.

Thus, this article uses the Civiliarchy Index to measure and compare the foreign policy resources of the West and the EU, identify the capabilities of the West and the EU in conducting foreign policy towards the EaP countries, and analyze the prospects for European integration and the emergence of a space of multifaceted cooperation, where the resources of the EaP countries, the West, and the EU could complement each other to achieve common interests. In doing so, drawing mainly on the theoretical framework of polyarchic democracy (Dahl 1971), liberal hegemony (Mearsheimer 2018), world-systems analysis (Wallerstein 2004), the theory of waves of democratization and civil society (Huntington 1991a, 1991b), regime transformation (Linz and Stepan 1996; Galtung 1996), resilience of European integration and Europeanization (Schramm 2024a, 2024b; Debus and Schweizer 2024; Costa 2023), the institutionalization of democratic procedures and strategic peace (Galtung 1996; Gutbrod and Wood 2023), primarily legal and legitimate change of political power, laid the foundations for the consolidation of democracy (Dahrendorf 2006; Zakaria 1997).

The anti-civiliarchic boiling point and aggressive war against European integration of post-Soviet countries became the Eastern Partnership (EaP) summit in Vilnius from 28 to 29 November 2013, when hybrid pressure from Russia became the main reason why both Ukraine and Armenia announced a change in their foreign policy priorities, abandoning European integration. The political elites of both countries expressed a desire to distinguish between the European political and economic dimensions, thereby offering the EU political integration, and the Customs Union (CU) under the leadership

of Russia offering economic integration. It was quite obvious that the decisive role in the issue of refusing to sign the Association Agreement (AA) with the EU (Van der Loo 2017), as well as in the choice of Ukraine and Armenia, was played by the risks of national security, the main guarantor of which for both countries was Russia. If the war for Ukraine began back in 2014 with the annexation of Crimea by Russia and the incitement of conflict in the south-east of Ukraine, then for Armenia it began on September 27, 2020, when Azerbaijan launched a full-scale war against Nagorno-Karabakh and, in fact, a proxy war against Armenia.

With the start of negotiations on the the EU's Association Agreements (AAs) and Deep and Comprehensive Free Trade Areas (DCFTAs) with Ukraine, Georgia, Moldova and Armenia found themselves in a situation that resembled a 'dichotomy of inter-integration conflicts' (Alexanian 2014). During this time, the EaP countries, united by a network of integration projects and initiatives, achieved impressive economic results, significantly strengthened their financial situation, as well as the situation of the majority of the population. Until 2013, Ukraine, Georgia, Moldova and Armenia were increasingly mentioned in official EU documents as good examples of sustainable development and expansion of the range of geopolitical ties, considering them as pillars of the emerging civiliahrich world order (Davutoğlu 2020).

However, already at the initial stage of the EU's AAs and DCFTAs, signs of an unfriendly reaction from Russia, both within and between integration organizations in the post-Soviet space, began to clearly appear. In contrast to the level of resilience of the European integration of Ukraine, Moldova, Georgia and Armenia with the EU, regional integration with Russia and the Commonwealth of Independent States (CIS), the CU, the Eurasian Economic Community (EurAsEC) and the CSTO faced internal crises that practically paralyzed the integration dynamics. An additional obstacle was the changing attitude of the West towards Russia, the confrontation between Russia and the West and the shift in priorities of political influence (Pradhan and Kakoty 2024; Gel'man 2003). There was a need to adequately respond to the changes taking place in the post-Soviet space and the EaP countries, simultaneously resolving the accumulated contradictions and systemic crises. After the eastern enlargement of the EU, in Eastern Europe, in the space between Russia and the EU, there are only four countries that have retained the ability to choose institutional and political scenarios for their development – Ukraine, Moldova, Georgia and Armenia. The parallel interest of Russia and the EU in cooperation with them, the close ties of these countries with Russia and the EU, the role of these countries in energy and transport communications with the EU, as well as the imperative resilience to take into account the positions of Russia and the EU when conducting foreign policy show the main factors that since 2013 have been considered by Russia as a space of confrontation with the EU and the West (Malinova 2022; Gel'man 2022).

On February 24, 2022, Russia launched a full-scale military invasion of Ukraine, which became an open and brutal cycle of aggressive war against European integration not only of Ukraine, but also of other EaP countries (Ehrhart 2024). The continuation of the anti-integration war has become another indicator of the use of post-Soviet populism towards Ukraine by the Russian political elite (Pintsch and Rabinovych 2025; Freudlsperger and Schimmelfennig 2025). The Russian-Ukrainian war for Russia has

become a way to preserve its ‘traditional sphere of influence’ and ‘strategic interests’ in the European space through hard power and limiting Ukraine’s sovereign decisions. The EU and other Western countries, unlike Russia, are taking steps to strengthen relations with Ukraine and other countries of the post-Soviet space, which is a priority of the EU foreign policy, promoting sustainable integration, preserving sovereignty and maintaining the resilience of these countries.

Since in the EaP countries, along with the ongoing radical transformation in various areas, many problems arose: from reforming the political, social, economic model, the need to establish internal stability to major interethnic conflicts and armed clashes, the EU had no choice but to reconsider its Eastern policy strategy and try to establish close ties and cooperation with Ukraine, Moldova, Georgia and Armenia (Upadhyay 2024; Müller and Slominski 2024; Minesashvili 2022).

Thus, the EU is faced with a difficult task, since it is still trying to integrate these EaP countries into the pan-European union. In the context of the limitations of liberal democratic ideals and the military realities of international relations, we examine the various mechanisms of support for democratization of post-Soviet transitional political regimes by the EU and Western democracies, as well as the interactions among CSOs, political institutions and movements in the EaP countries. By critically analyzing its arguments, this article seeks to understand how the theory of Civiarchy can shed light on the problems that post-Soviet countries face in their authoritarian and democratic consolidation. In particular, we analyze the capacity of the civiliarchic foundations of democratization in Armenia, Georgia, Moldova and Ukraine, as well as the anti-civiliarchic foundations of authoritarianization in Azerbaijan and Belarus. This reveals the mechanisms of countering populist tendencies and the role of European integration in shaping democratic trajectories in the EaP countries (EEAS 2022).

By analysing the theory of civiliarchy and theoretical perspectives on civiliarchic democracy, this article aims to contribute to the existing discourse in the social sciences on the non-linearity of civiliarchic challenges to democratisation in Armenia, Georgia, Moldova and Ukraine, as well as non-civiliarchic and anti-civiliarchic challenges to autocracy in Azerbaijan and Belarus. It seeks to provide new insights into the resilience of civiliarchic democracy in the face of non-civiliarchic and anti-civiliarchic challenges to autocracy.

The findings of this study can inform policymakers and stakeholders in their efforts to strengthen democracy and promote more inclusive European political integration in the EaP countries. The study employs a mixed methods approach, including a literature review, case studies, comparative analysis and a Delphi method involving expert opinions. The aim is to provide a comprehensive understanding of the political, economic, social and cultural dimensions of civiliarchic democracy that shape the transition processes in the EaP countries and the complexities of European integration. Through this comprehensive analysis, we aim to shed light on the complex dynamics between civiliarchic democracy, anti-European populism and European integration, thereby contributing to a deeper understanding of the challenges and opportunities in the pursuit of democratic consolidation (Heinisch, McDonnell and Werner 2021; Malkopoulou and Moffitt 2023).

A comprehensive literature review establishes a theoretical framework, including relevant scientific perspectives, and provides an understanding of key theoretical concepts and terms. The results of this study contribute to a deeper understanding of European integration transitions, challenges and opportunities in the pursuit of democratic consolidation in four EaP countries, and authoritarian consolidation in two countries. By examining the resilience of ciliarchic democracy in the face of anti-religious populism and gaps in European political integration, this study develops a strategic framework for the stability of democratic institutions and the promotion of more inclusive European integration (Rašković, Haynes and Vangeli 2024).

In the following sections, we delve into the theoretical foundations of ciliarchic democracy, examine the causes and consequences of anti-European populism, study the resilience of ciliarchic democracy in the face of populist leaders and groups (Saxonberg and Heinisch 2022; Crowder 2023; Venizelos 2024), assess the gaps in European political integration, and discuss the ciliarchic implications for strengthening democratic institutions and overcoming existing divisions.

## **Methodology**

This study used a mixed methods approach to investigate the political, economic, social and cultural dimensions of the Index of Ciliarchy in the EaP countries. The research design included a literature review, case studies, comparative analysis and the Delphi method to collect expert opinions and assess the security, participation, transparency, representation, control, dialogue, partnership, accountability and development aspects of the political, economic, social and cultural dimensions. A comprehensive literature review and document analysis were conducted to create a theoretical framework, gain insights into the concepts of ciliarchic democracy, EU integration challenges, gaps and achievements. In particular, the literature review focused on examining the sustainability of ciliarchic democracy (Aleksanyan 1999, 2010a, 2010b) in the context of post-Soviet populism and gaps in European integration. The review covered scholarly works that examined the challenges and dynamics of democratic consolidation, the impact of populism on democratic processes, and the complexities of European integration in post-Soviet countries (Freudlsperger and Schimmelfennig 2025; Griffiths 2013; Holden 2017; Sweetman 2021; Weissenbacher 2022; McLaren 2024). A prominent place in the literature review was occupied by the analysis of the critique of liberal democracy (Sharlamonov 2022) as a theoretical basis for understanding the tensions and limitations inherent in liberal democratic ideals and the realities of international relations (Wallerstein 1995a, 1995b). This perspective provided insights into the complexities of democratic transitions, the role of political institutions, and the interaction between civil society and anti-European populist movements in the context of the EaP countries.

The study conducted case studies in six EaP countries to obtain empirical evidence on the resilience of ciliarchic democracy. These case studies aimed to examine political processes, populist movements, democratic backsliding and consolidation, and the impact of European integration on these processes (Heinisch, Saxonberg, Werner and Habersack 2021). To this end, the case studies allowed for an in-depth examination

of political systems and the influence of various factors on the transition processes. The analysis also considered how the theoretical framework of the critique of liberal democracy can be applied to assess the resilience of civilarchic democracy in the face of authoritarianism and populist challenges and the gaps in European integration in the EaP countries. The case studies contributed to a deeper understanding of the factors influencing the democratic trajectories of these countries and shed light on potential strategies and approaches to strengthen democratic institutions and overcome the gaps in European integration (Aleksanyan 2018a; Aleksanyan 2011, 2014; Alexanyan 2005).

The Delphi method<sup>1</sup> was applied to gather expert opinions and evaluations on the Political, Economic, Social and Cultural dimensions of the Index of Civilianarchy in the EaP countries. 15 experts were included in the Delphi survey based on their expertise in the field of EaP countries' political, social and economic processes, European integration and democratic issues. The experts were provided with a questionnaire consisted of 36 factors/aspects of mentioned dimensions to rank each dimension on a scale from 1 to 9. The Delphi survey was conducted in several rounds to ensure convergence of opinions and to reach a consensus among the experts. Median and quartile ranges were calculated to determine the final estimations for each dimension and finally for the aggregate of the Index of Civilianarchy. A comparative analysis was conducted to identify patterns, similarities, and differences among the EaP countries in terms of the political, social, economic and cultural dimensions and overall score of the Index of Civilianarchy.

### **Theory of Civilianarchy: an attempt to fill the gap in the concept**

Civilianarchy or civilicracy is a civilized and civil government, as well as a form (order) of civilized and civil government, self-government. Civilianarchy is interpreted as civilized government (civilarchic legitimacy) as opposed to violence and barbarity, and as civilized governance, control, and regime as opposed to military or war dictatorship (civilarchic legitimacy gap). In the context of civilianarchy, we can also use the concept of 'civilianarchy', which indicates the degree of intolerance and conflict among actors and institutions where constitutional order and the rule of law are violated or threatened (de Ghantuz Cubbe 2022; Cocozza 2023). This can take the form of military coups, terrorist attacks, armed conflicts, civil wars, etc. In the above context, civilianarchy is also an anti-civilianarchy.

Civilianarchy is a civilization- and civic-centered society, as well as a value-rational and goal-rational situation of the activities of public institutions. In politics, they are actors who promote the protection of human rights and the rule of civilized norms and laws.

Civilarch is an actor who wields civilized power and exercises civilized rule, as opposed to a monarch or a tyrant. In another sense, a civilarch or civilicrat is a civil ruler or civil servant, as opposed to military rulers and military servants. To

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<sup>1</sup> Ethical considerations were taken into account throughout the research process. Informed consent was obtained from the participants involved in the Delphi survey, and their anonymity and confidentiality were ensured. The research adhered to ethical guidelines, and the study was conducted in accordance with relevant ethical standards.

supplement the semantic meaning of this concept, one can use civiliphobia, which is the unacceptability of civilized existence, as well as an atmosphere of general fear among people and CSOs. The general progress of civilization is considered unacceptable by authoritarian leaders, chieftains, groups or various public associations who are afraid that they will lose their individual and oligarchic domination, levers of power and resources in the context of general civilizational development and national progress. Civiliphobists often take advantage of illiteracy, backwardness or ignorance of society and consider any progress to be anti-national and destructive. And by resorting to various measures (terrorism and other barbaric acts) in civilized societies, they create an atmosphere of general fear. In this way, they try to achieve the results desired for their dominance and hegemony.

### **The relationship between civiliarchy and democracy: civiliarchic democracy**

Civiliarchic democracy reflects the complementarity and inseparability of the process and outcome of democracy. It also manifests itself as a civil-centric axis in global and domestic political systems. It is impossible to imagine democracy, democratization, domestic and international procedures for the protection of human rights and freedoms without civiliarchism.

The correlation between the concepts of 'democracy' and 'civiliarchy' shows that the concept of 'democracy' is wider than the concept of 'civiliarchy'. Which means that democracy includes civiliarchy.

Civiliarchic democracy is such an institutional order of preparing, adopting, implementing and controlling political decisions, in which the winning actors as a result of the civilized competitive struggle for the votes of the people receive the powers of the civilized exercise of public power. Here, the fact that the political competitive struggle can be both value-rational (Wertrational) and value-irrational, and goal-rational (Zweckrational) and goal-irrational in its content and form (Cocozza 2023; Weiss 1985; Boudon 1997; Jakobs 2022), as well as the fact that not only the exercise of public power, but also the civilized exercise of authority is urgent. Which also implies ensuring the civiliarchic legitimacy of public power, because democracy is not only a way of life, but also a civilized way of life, where both the process and the result of the implementation of that way of life are reflected. In this context, civiliarchic democracy tries to overcome the contradictions of legitimacy, equality, liberalism and others, because, as we have seen from the above discussions, not every freedom, equality or legitimacy can necessarily presuppose the existence of democracy (Boulter 2024; Joppke 2021; Wallerstein 2006). And on the other hand, it is simply impossible to lead the whole public life to government relations.

### **Civiliarchic strengthening and supplementation of liberal democracy**

Comparative study of liberal democracy in the EaP countries, as well as civiliarchy and the related European integration and Europeanization, is one of the most important areas of modern political science (MØller 2008; Lijphart 1969). The problem of resilience, survival and transformation of democratic regimes in the EaP countries is

becoming especially relevant in the era of globalization, when the worldwide triumph of democracy is gradually encountering obstacles and attempts to restrain it from authoritarian regimes. Since 2013, the democratization of political regimes in the EaP countries has been experiencing one of the deepest crises in history, both at the level of values and in the sphere of practical institutions. Due to the European integration of the EaP countries, in particular Ukraine, Moldova, Georgia and Armenia, Russia and the Western countries have slid into counterstruggle and a new cold war. The EU and NATO are moving towards ensuring comprehensive security in accordance with the agreements and their roadmaps of the EaP countries in order to seek ways of effective interaction with these countries. The modern steps of the post-Soviet EaP countries to implement liberal democracy, comprehensive European integration and future EU membership are considered unfriendly by the Russian political elite (Malinova 2022), thereby closing the political dialogue with the U.S., EU and NATO.

The obstacles to liberal democracy were particularly acute in Ukraine, Moldova, Georgia and Armenia, as the implementation of values and institutions in these countries caused a negative response and hybrid war from Russia, which, unlike the EaP countries, thereby demonstrates its inflexibility and inability to adapt to rapidly changing conditions of the external environment. The goal of the hybrid policy in the EaP region, conducted by Russia, was and remains to cause serious damage to the image of the EU, trying to devalue human rights, the rule of law and democracy as European values and a political brand. In the current situation, since 2013, the political leadership of the EU has been particularly acutely faced with the question of choosing the further path of resilience and sustainable development of the EaP countries.

The problem of finding a civiliarchy that strengthens liberal democracy is faced not only by the EU political system, but also by the European community and CSOs. It is especially relevant for the new democracies of the EaP countries, which include Armenia (Suciu 2018). The model of civiliarchic democracy that has developed in Western Europe has proven itself to be one of the most effective and at the same time one of the most democratic in the world. The study of civiliarchic democracy as a unique phenomenon of political life and strengthening the liberal democratic development option seems very promising and useful. However, since 2013, civiliarchic democracy in Europe has also faced a number of serious problems, most of which are of a complex multi-stage security nature. The fate of the EaP region and the future of democracy in Europe depend on the ability of civiliarchic democracy to cope with hybrid security challenges. In this regard, it is important to analyze the complex transformations that are also taking place in a number of EU member states (Heinisch and Jansesberger 2022; Heinisch and Jansesberger 2021).

Is it possible to proclaim the advent of the era of civiliarchic democracy? Considering that civiliarchy is characterized by the resilience of democratization and Europeanization of the EaP countries, since this form of democracy must keep up with the pace of securitization and effectively cope with hybrid challenges (Gritschmeier 2021a, 2021b). All this and the security dilemma have become especially acute in the EaP countries since 2013 in the conditions of neither war nor peace, as well as hybrid war and Russia's hard power against the post-Soviet EaP countries.

The model of social, economic and political organization of social democracy that has developed in Western Europe has proven itself to be effective and one of the most democratic in the world. At the same time, social democracy has deep liberal roots, being in fact the successor of the liberal democratic model (Platzer 2024). The study of social democracy as a distinctive phenomenon of political life and as a potential basis for liberal democracy seems to the authors to be very promising and useful (Heinisch and Werner 2024). An analysis of scientific ideas about the dimensions of civiliarchy and deomratization of the political system of the EaP countries allows us to present the scientific novelty of this study, which consists in the following:

- two approaches to understanding the political dimension of civiliarchy are presented: 1) elements of the political dimension as part of human rights and freedoms; and 2) European political integration;
- political dimensions of civiliarchy are proposed;
- the specificity of elements of political dimensions in various types and models of political systems of the EaP countries is shown;
- the main structural elements of the political dimension of civiliarchy are identified: actors, institutions, norms and communications;
- an idea of the main characteristics of elements of the political, economic, social and cultural dimensions of the civiliarchy of the EaP countries is given.

As a result of the study, two main approaches to understanding the political dimension of civiliarchy have been identified. The *first approach* defines the political dimension as part of human rights and freedoms. So, taking interests and goals as the basis of national and human security, we single out political interests from the totality of national interests as part of the national one; through threats - against the background of various societal threats, we derive political threats (regional conflicts and wars, political terrorism, mistakes and miscalculations of political leaders); through the governance level - along with public institutions, CSOs also act as actors of national and human security; through the political system - national and human security includes many subsystems (Barbieri and Aleksanyan 2024). The *second approach* - political dimensions as European political integration as the basis for its definition can be based on political goals and values, political stability and stability, threats, conflict.

Not only threats, values, interests or other separate political elements should be considered as an object of the political dimension, but a set of elements that are closely interconnected with each other and involved in a single system - the political one. The selection of a political system among numerous political phenomena as an object is due to the following features of it. It is a set of elements closely interconnected with each other and functioning as a single whole, which makes it possible to study political security as a complex phenomenon, coexisting and interdependent with other political categories (interests, values, goals, threats, political actors, politics); the political system covers only those phenomena and processes that are united by the concept of political power, which contributes to the formation of not an interdisciplinary approach, but a purely political one to political security; the political system of society is characterized by temporal, spatial, cultural, historical and legal aspects that allow us to analyze political security in the context of modern European integration of the EaP

countries and identify the causes that cause the emergence of various types of political security (Juška 2024).

The political security of the European integration of the EaP countries has its own specific structural elements, which include: political actors (institutions, groups, organizations, individuals) that fix the forms of political activity, ways of exercising power, management methods; determine political goals and ways to achieve them in accordance with the interests of the individual, society and the state, taking into account social and political practices, ideas, value orientations and attitudes; regulatory and legal provisions and principles that implement the regulation of the activities of the political system as a whole and its individual elements (political institutions, organizations, citizens); and also determine the conditions, possibilities and boundaries of the functioning of the entire political system; and, finally, communications that take place both within the political system (between the legislative and executive branches of government, between individual political leaders, between voters and deputies), and outside the political system, that is, the interaction between the political system and the environment (between state and citizens, political leader and people, non-profit, public organizations and authorities, and so on).

The Europeanization of the EaP countries has an ambiguous impact on political security: information technology breakthrough, increased interdependence of countries, social and economic integration, development of infrastructure and services, science, etc. As the pace of European integration and Europeanization of the EaP countries accelerates, negative consequences and hybrid challenges from Russia become increasingly visible (Paustyan and Busygina 2024): the energy and environmental problem has worsened, new dangers have emerged due to war and the aggravation of frozen conflicts, and the problem of intervention is acute. As a result, the space of complex multi-stage security is expanding: it includes not only issues related to military and political security, but also security in almost all areas of human activity. In this sense, as the relations between the state, society and citizen of the EaP countries undergo democratic transformation, and under the influence of Europeanization, political security is filled with new content, its paradigm is changing (Baltag and Romanyshyn 2024).

The key element of the renewed paradigm of liberal democracy is the resilience of public authorities of the EaP countries. In this regard, there is a need to rethink the methodological and conceptual foundations of political security in the EaP countries. Ensuring political security, being one of the key functions of a sovereign state, is conditioned by the peculiarities of the political regime, which determines the main priorities of the policy of European integration and Europeanization. In the political space of the EaP countries, there are different democratic and authoritarian practices that create variability both in the understanding of political security and in the formation of a complex multi-stage system and its provision. Ukraine, Moldova, Georgia and Armenia are fully or partially consolidated democracies, but at the same time, Azerbaijan and Belarus have authoritarian regimes. This is due to the fact that in the context of the Russian hybrid war against the European integration of the EaP countries, weak institutions of liberal democracy are not an effective mechanism for finding and selecting political decisions, as well as implementing initiatives of

individual citizens, social groups and public associations, including on issues of ensuring the political security of public authorities, society, and individuals. However, under the influence of external and internal factors, different types of regimes in the EaP countries are developing systems of political security and methods of ensuring that do not always correspond to ideal ideas about liberal democracy. According to our research, since 2013, the EaP countries have shown a tendency towards a decline in the development of democracy, the main reason for which was and continues to be the weak resilience of the ciliarchic foundations. Hybrid new dangers and threats forced the leading democratic EaP countries to partially limit freedoms and human rights, and because of the security dilemma, even slow down reforms to strengthen democratic institutions. The paradox, however, is that these situational restrictions are becoming the norm and are extrapolated to everyday life. Deviation from democratic principles in the name of ensuring political security ultimately creates dangers and threats for both the individual and civil society and public authorities. Therefore, modern researchers of liberal democracy in the EaP countries are faced with the task of finding a balance between democracy and political security, as well as identifying the ciliarchic features of its provision in conditions of neither war nor peace.

### **Political dimensions of cooperation between the EU and EaP countries**

Since 2013, the normative power of the EU has been developing unevenly in different periods of the formation of EU foreign policy as a global actor and having heterogeneous influence, depending on the context of application. The main criterion for the existence of normative influence is its recognition by other actors.

The study is intended to contribute to a constructive understanding of EU foreign policy in the EaP countries, its relationship with internal political processes and foreign policy strategies of Armenia, Azerbaijan, Belarus, Georgia, Moldova, and Ukraine. The study provides an opportunity to consider the factors influencing the motivation of political elites to form political alliances with global actors, as well as to trace the results of cooperation between the EaP countries and the EU since they gained independence.

Studying the political influence of the EU in various areas of relations with each of the EaP countries is of interest for several reasons. Determining the democratic factors that influence the success of foreign policy cooperation and trigger the process of change is important not only within the framework of the study of EU foreign policy, but also in the context of integration initiatives: interdepartmental programs, development assistance policies, humanitarian policies and other aspects of interstate relations (EUR-Lex 2016; EUR-Lex 2019). The listed areas of cooperation serve the purpose of ensuring the national interests of the EaP states and are part of the foreign policy of regional actors.

The study makes it possible to study the political transformations taking place in the EaP countries, which affect the goals and objectives of statehood, formulated by national political elites. Based on this, we will consider the EaP as a community of countries that interact with the EU along with other global and regional actors, building

their foreign policy in conjunction with the domestic political process and public demand for change.

Analysis of political dimensions devoted to cooperation between the EaP countries and the EU in the field of ciliarchic reforms complements publications discussing the eastern direction of EU foreign policy, the liberal world order (Mearsheimer 2018; Wilford 2023), the spread of ideas of ciliarchic democracy in post-Soviet countries, the role of CSOs in the EaP countries; features of the distribution of power in the EaP countries; on promoting democracy in regions with high conflict potential (EUR-Lex 2016; EUR-Lex 2019).

In political science research, there is not enough discussion of what exactly is meant by ciliarchic and democratic reforms, how their quality is assessed, and what are the limitations of development assistance programs for third countries carried out by international organizations that postulate democracy as a way to achieve stability and improve the well-being of citizens. The issue of political sovereignty of the EaP countries has a significant impact on the choice of a particular research paradigm, but there is still no broad discussion on this issue in scientific publications in the social sciences (Baltag and Romanyshyn 2024; Lavrelashvili and Van Hecke 2023; Lavrelashvili and Van Hecke 2023).

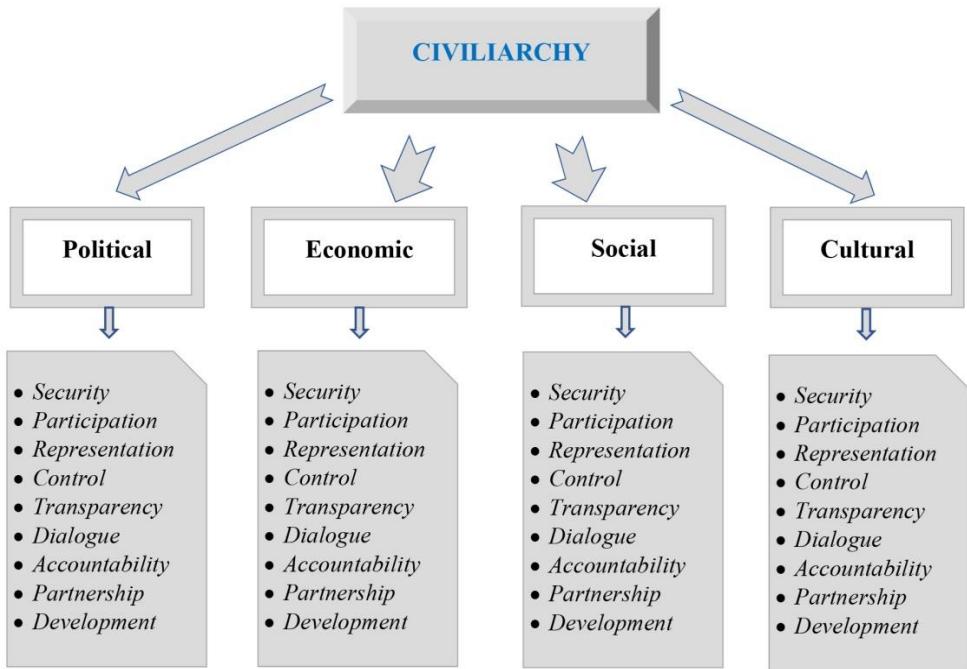
The subject of the study is the political integration between the EU and the EaP countries for the period from 2013 to 2023, as well as the political factors of ciliarchy in the relations between the EU and the EaP countries. The aim of the study is to identify the influence of the political factors of ciliarchy on the relations between the EU and the EaP countries for the period from 2013 to 2023.

To achieve the goal, the following tasks were set:

- To establish the meaning of norms and ideology in the neoliberal theoretical tradition, to outline the criteria of the EU's ciliarchic influence;
- To identify the foundations of the EU's partnership with the EaP countries, enshrined in the European Neighbourhood Policy and Enlargement Negotiations, the EU's Global Strategy for Foreign and Security Policy;
- To identify the political factors of ciliarchy that influence the choice of one or another format of partnership with the EU by the EaP countries;
- To analyse the achievements and limitations of the EU's foreign policy in the EaP region;
- To characterise Russia's position in the EaP region;
- To determine the degree of influence of the political factors of the EU's ciliarchy in each of the EaP countries, depending on the format of interaction in the areas of democratic reforms, improving the well-being of citizens and regional security.

## Construction of the Index of Civiarchy<sup>2</sup>: Political, Economic, Social and Cultural Dimensions

Figure 1. Dimensions of the Index of Civiarchy



As shown in Figure 1 the Index of Civiarchy has four dimensions or sub-indices: Political, Economic, Social and Cultural. Each sub-index has 9 indicators covering different aspects of the given conception. The indicators are: Security, Participation, Representation, Control, Transparency, Dialogue, Accountability, Partnership, and Development. The interrelationship and comprehensive analysis of these indicators reveals the quality of civiarchy and democracy, as well as civiarchic democracy.

<sup>2</sup> In this article we have only considered the political dimensions of the index of Civiarchy.

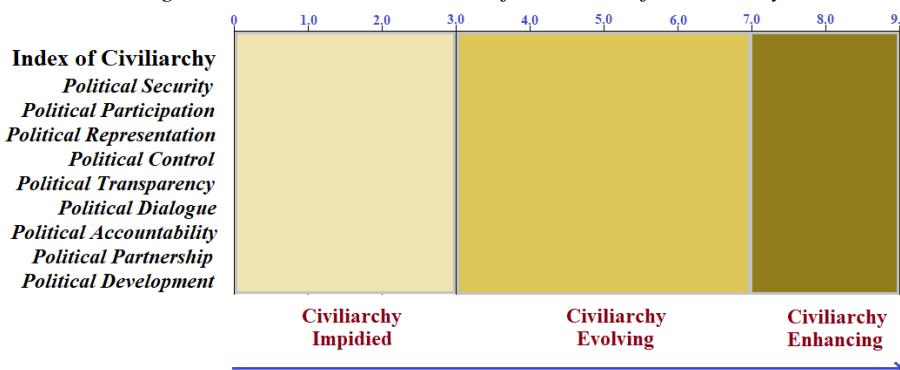
*Figure 2. Political Dimensions of the Index of Civiliancy*

Figure 2 illustrates this using the political dimensions of the Civiliancy Index as an example. But taking into account also the other dimensions of the Civiliancy Index, it can be stated that the indicators and subindices of the Civiliancy Index are ranked from 1 to 9, where 1 is the lowest level of the measured level of Civiliancy, and 9 is the highest. For the final definition of Civiliancy index levels, the following three sections are defined (see Figure 2):

- Impidied Civiliancy (anti-civiliancy and non-civiliancy): 1 - 2.9 points;
- Evolving Civiliancy: 3 - 6.9 points;
- Enhancing Civiliancy: 7 - 9 points.

### **Political Dimensions of the Index of Civiliancy of the EaP Countries from 2013 to 2023**

#### **Political Security**

**Definition.** Political security refers to the condition in which a political system, its institutions, and the overall governance framework are stable, resilient, and able to maintain order, protect individuals' rights, and provide a sense of security for population, society and public administration. It encompasses the stability, legitimacy, and effectiveness of political institutions, as well as the fight against threats and risks that could undermine the functioning of the system. Political security can be inferred through political interests, political values, political threats, political order and development. This approach can only lead to a detailed description of individual areas of European political integration.

Figure 3. Political Security of Civiarchy

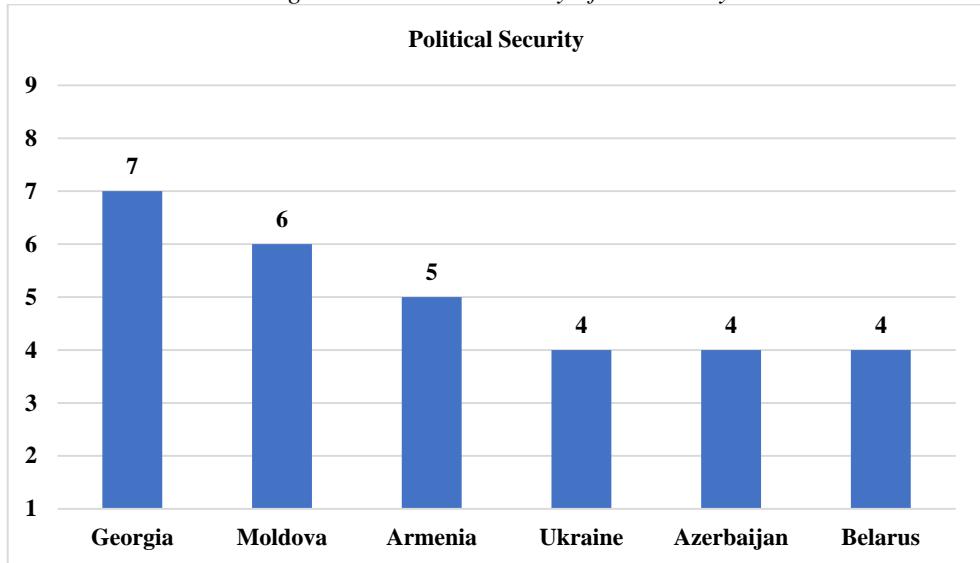


Figure 3 shows the ranking of the EaP countries from 2013 to 2023 by the dimension of political security of Civiarchy, which is largely related to the various challenges of European integration and which the EaP countries face when interacting with other EU member states and various EU institutions (Santaniello and Barbieri 2024). From 2013 to 2023, there was a rapid development of social, economic, political, cultural areas in the study of security in the EaP countries. Scientists began to actively develop, review and rethink new dimensions of national security in the EU and the EaP countries, and in parallel with it, its varieties: constitutional, political, economic, informational, social, and so on. In most cases, the dimensions of political security of the Civiarchy index are considered as an integral element of complex multi-stage security with its subtypes of foreign policy and domestic policy.

European integration has significantly changed the external and internal environment of the political systems of the EaP countries, necessitating a new look at numerous political phenomena, including political security. Since 2013, the traditional understanding of political security as protection from deliberate threats from countries or blocs of countries, which has existed for a long time, has lost its significance and requires a different interpretation with its broader functions, goals, with other methods and means, and other consequences. Before, during and after the Vilnius Eastern Partnership Summit in 2013, the main sources of the main threats and risks to European political integration became obvious, which went beyond the EaP countries and their allies. These already include: Russian hybrid interests and war, international and ethnopolitical conflicts, gaps in nation-building, corruption, polarization, various manifestations of the human factor in the sphere of governance, that is, incompetent officials and politicians, acute intra-political struggle among political parties, social groups and CSOs.

As the main events of European political integration in the EaP countries, as well as the integration policy of the EU, show, modern political security as a system for protecting the vital interests of the individual, CSOs and the state testify to its understanding in the traditional sense (Klimovich 2023). At the current stage of European political integration of the EaP countries, threats can also come from the development of a democratic political system and from an individual, and from CSOs, and from public authorities, as well as from state institutions themselves. In this context, European integration should promote the resilience of the political systems of those EaP countries whose political elites, public authorities, CSOs and other groups have effectively worked and are working for the resilience of their countries (Schramm 2024a, 2024b).

The EaP countries that have not been actively involved in the implementation of their roadmaps for European integration have led and continue to lead to a decline in the prestige of citizenship, manifestations of internal polarization, the initiators of which are often the public authorities of a number of countries (Azerbaijan, Belarus). In the case of Azerbaijan and Belarus, it can be concluded that they declare the same values and goals in official legal documents, but by their actions they sow hostility and conflict between nations, representatives of various political parties and groups, businesses, and between people whose incomes differ significantly. And all this is done for one purpose, to preserve the significance of their authoritarian power as the main social institution of political security.

In connection with the trends of Europeanization of political life and politicization of public life, the development of constructive/destructive and positive/negative economic, social, cultural and other processes in political systems, the role of the political elite and CSOs, capable of helping to eliminate certain challenges, is increasing. Therefore, in the structure of political security bodies, those scientific studies that are aimed at studying various phenomena within the country, developing measures against destructive processes that threaten European integration and the foundations of public authority and political order are of particular importance.

The development of theoretical and practical tasks of political security of the EaP countries, the analysis of the functions corresponding to it and its institutional design (government agencies, special services), the mechanism of security management, the preparation of the concept of comprehensive political security, forecasting and eliminating political dangers are becoming increasingly in demand.

## Political Participation

**Definition.** Political participation refers to actions taken by citizens or groups of citizens with the aim of influencing public policy, the management of public affairs, or the choice of political leadership, leaders at any level of political power, local or national. Political participation is a voluntary activity through which members of a society participate in the selection of rulers and, directly or indirectly, in the formation of public policy. It can be permanent or episodic, using legal or illegal methods of power, organized or unorganized.

Figure 4. Political Participation of Civiarchy

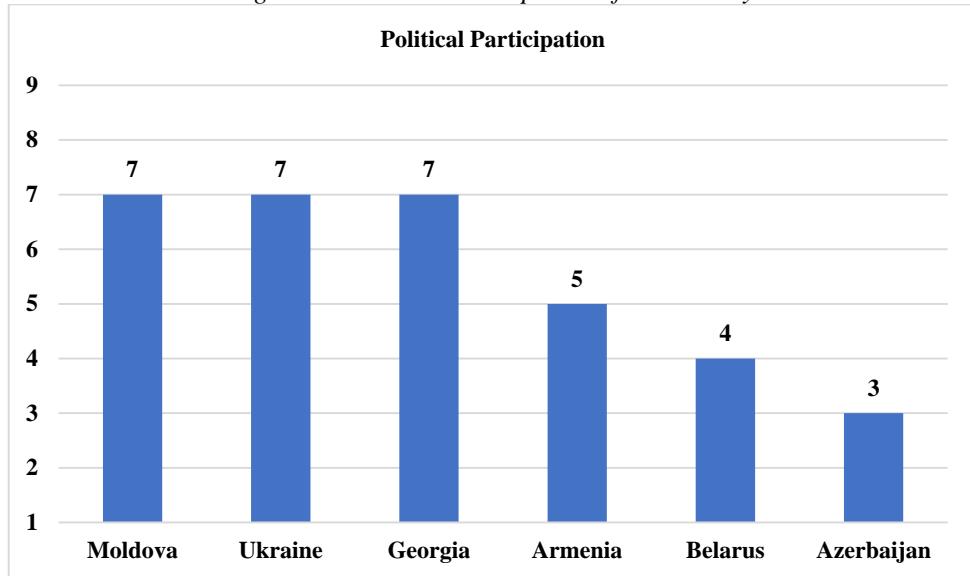


Figure 4 shows the ranking of countries by the political participation dimension of the Civiarchy Index, which requires a qualitative understanding of the sustainability of political development in the context of European integration, which encourages us to study the existing dynamic imbalance of political exchanges, the asymmetry of political relations in the communicative discourse through the prism of asymmetry and symmetry, stability and sustainability of the development of the EaP countries. Real needs to change the quality of integration processes and political participation actualize the tasks of studying the nature of interaction between government structures and CSOs, media and communications. Sustainable political development, increasing the social efficiency of public authorities necessitate an integrated approach to legitimizing political changes, which allows eliminating social and cultural gaps in the space of the EU integration policy in relation to the EaP countries (European Parliament 2024a, 2024b, 2024c).

The ranking of countries shows that Moldova, Ukraine and Georgia have implemented democratic mechanisms of political participation at various levels, which is due to the fact that these countries are going through a period of reforms related to the Europeanization of public relations (see Figure 4). A new type of interaction between the main actors of the political process is being formed, which implies the active involvement of CSOs in public policy. The reform of political life in Armenia gradually leads to the state losing its monopoly position in politics before the Second Karabakh War of 2020, but in post-war Armenia the situation has changed. The transformations taking place in Armenia create conditions for the development of civil society, real participation of NGOs in political activities, and the emergence of new forms of influence on public authorities. At the same time, there are a number of factors that hinder further deepening of European integration in Belarus and Azerbaijan

(see Figure 4): a deep crisis in all spheres of society, transformation of the state apparatus into a self-sufficient corporation focused on realizing its own interests, marginalization of a significant part of the population, lack of stable democratic traditions, etc. The current authoritarian circumstances in political life in Azerbaijan and Belarus make the problem under study relevant, especially during the presidential and parliamentary elections. Non-civiliarchic tendencies were dominant in the Azerbaijani presidential elections on October 9, 2013 and April 11, 2018, as well as in the parliamentary elections on November 1, 2015 and February 9, 2020. In Belarus, non-civiliarchic political participation was during the Belarusian presidential elections held on August 9, 2020, the results of which directly contradicted European values.

### Political Representation

**Definition.** Political representation refers to the process and practice of elected political parties, leaders, social groups and movements acting on behalf of the interests of their electorate and part of the population for European political integration. Political representation is one of the most important elements defining the main characteristics of modern liberal democracy. It serves as a link between the ruling party and parliamentary parties, between political parties and the political system, between citizens and CSOs, allowing their voices and points of view to be heard and considered in the development and implementation of public policy.

*Figure 5. Political Representation of Civiliarchy*

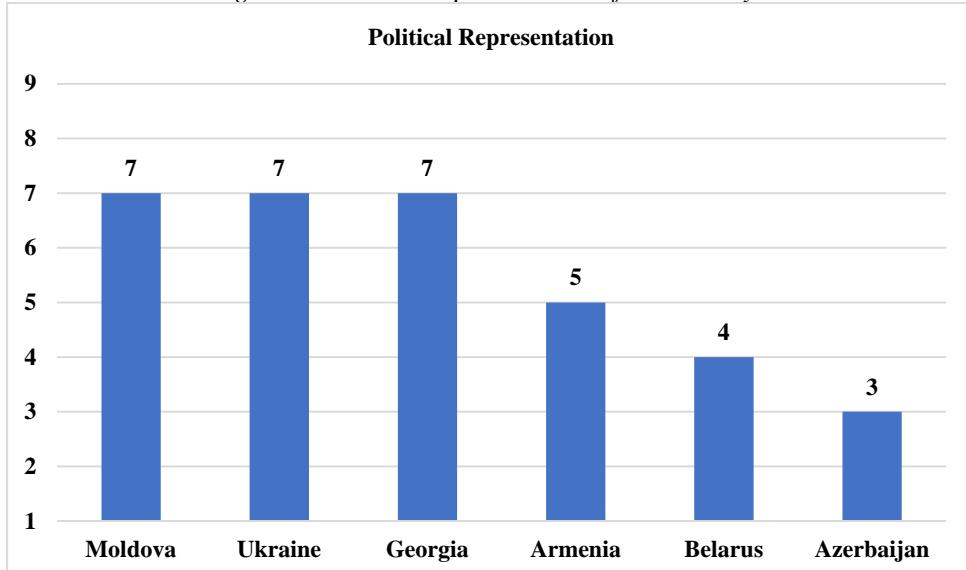


Figure 5 shows that Moldova, Ukraine and Georgia are the leaders among the EaP countries in terms of political representation, while Azerbaijan ranks last. It is obvious that all EaP countries still have a lot to do to become civiliarchies and democratic public authorities, where direct participation of each citizen in all political decisions

would be possible. Direct democracy applies to a very limited range of decisions made through the direct participation of CSOs and active citizens. In this context, Moldova, Ukraine and Georgia have successfully reformed political representation, when CSOs and active citizens delegate their public powers. It is through political representation that public authorities and local self-government bodies are formed, and it is through political representation that citizens of Armenia are given the opportunity to transfer their demands into the sphere of political decision-making. The mechanism for implementing political representation is the electoral system and legislation, which include non-civiliarchic mechanisms in Azerbaijan and Belarus.

The task of identifying the most democratic form of political representation and civiliarchic mechanisms for its implementation at the current stage of European integration of the EaP countries is particularly relevant. Despite the deepening of democracy in Moldova, Ukraine, Georgia and Armenia, there is a simultaneous tendency for citizens to decrease their trust in the main institutions of civiliarchic democracies, including parliament and political parties. This is evidenced by the data of our study, according to which there is distrust not in the democratic institutions themselves, but in how they function.

### Political Control

**Definition.** Political control refers to the bodies and persons exercising public authority powers to develop and implement decisions in various areas of European political integration. This may include the president, parliament, government, regional and local authorities, as well as CSOs. It includes the mechanisms and practices by which actors exercise control over political institutions, policies and results.

*Figure 6. Political Control of Civiliarchy*

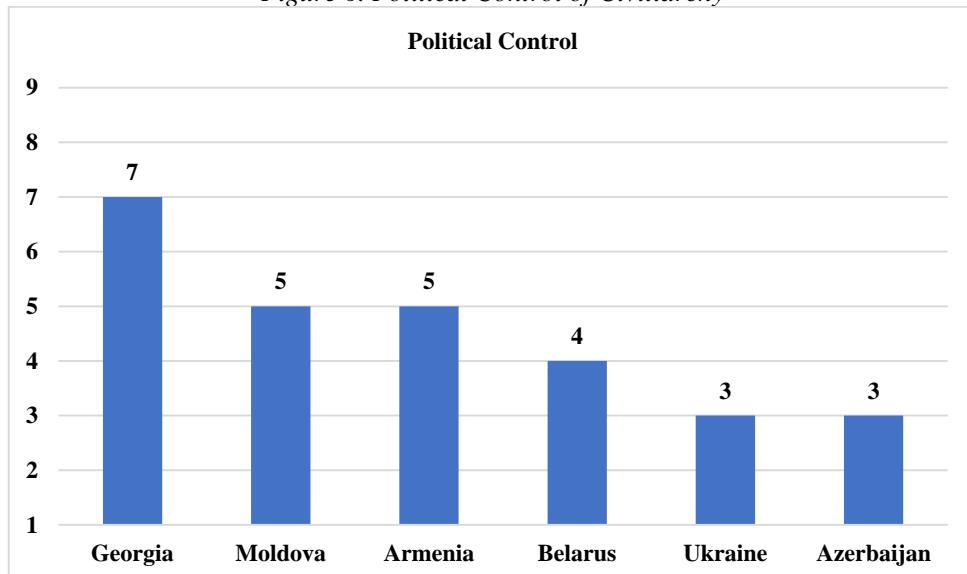


Figure 6 shows that Georgia is the leader among the EaP countries, represented by the government and the ruling party, exercising effective control over various aspects of public authority and local government. If we turn to the scale of corruption control in the EaP countries, it is customary to compare it with the level of corruption in the EU member states. Corruption damage in the EaP countries is particularly complex, since it stands out in the structure of property losses not only of public authorities, but also of other economic actors. At the same time, the level of corruption in Georgia, Armenia and Moldova is formed by territorial segments. Against this background, the state of regional economic security is determined by the specifics of the impact of corruption, typologized taking into account modern trends in public administration, business management, and public-private partnership in the EaP countries.

Thus, scientific ideas about anti-corruption control in the system of ensuring the security of European integration and modern management practice are in dynamics, which is manifested in individual gaps and contradictions that require theoretical and methodological understanding. Strategic approaches to ensuring the political security of actors through the system of anti-corruption control in the EaP countries require revision and updating, taking into account the achievements of European integration (European Parliament 2024a, 2024b, 2024c). Therefore, the study of the influence of control mechanisms on effective anti-corruption policy in Ukraine should be based on a holistic view not only of their nature, but also of development factors, including the conditions for the institutionalization of European criteria in the political and economic systems. In this context, the implementation of the developed European fundamental principles and recommendations for the prevention of corruption in the sphere of political and economic relations, consisting in ensuring managerial conditions for combating corruption as a factor in the security of the European integration of the EaP countries, is of civilarchic importance. Their implementation in the public administration of the EaP countries will increase the effectiveness of preventive measures in the field of combating corruption. It is shown that the EU criteria that contribute to the allocation of special types of such control should not be territorial conditions, but principles that allow achieving openness and transparency of preventive anti-corruption measures. It is proposed to classify anti-corruption control in Azerbaijan and Belarus into internal and external according to the criterion of economic interest of the actor implementing verification activities, and to classify the actors of anti-corruption control themselves into conditionally independent and conditionally interested.

## Political Transparency

**Definition.** Political transparency refers to the principle and practice of openness, accessibility in political processes, institutions and decision-making in the context of European integration. Political transparency and openness of public administration are necessary not only to increase respect and trust in public authorities, but also to ensure the resilience of both the public administration system and the Europeanization of the political system of the EaP countries. Openness and transparency of public administration are the institutional basis for the functioning of feedback mechanisms,

ongoing relations and interactions between civil society and government, as well as government accountability to civil society and citizens.

In terms of dynamically increasing the level of openness and transparency of the activities of government bodies among the EaP countries, Moldova and Ukraine are the leaders (see Figure 7), which is a qualitative sign of European political integration in the context of the concept of e-government.

*Figure 7. Political Transparency of Civiliancy*

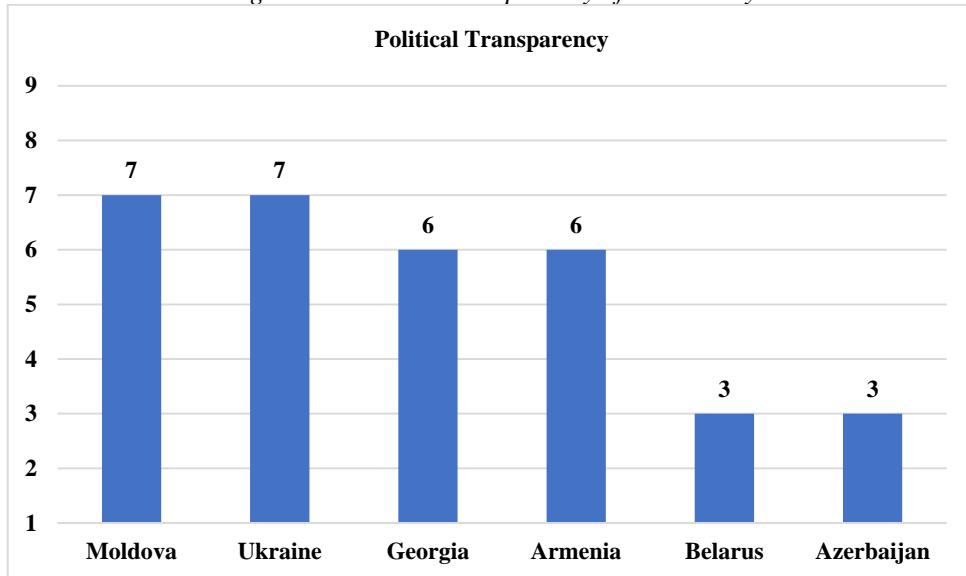


Figure 7 shows the level of transparency of public authorities of the EaP countries in the context of European political integration, as well as the extent to which their actions become open, understandable and accessible to citizens. This means that the dynamics of political transformations of the EaP countries aimed at increasing the efficiency and legitimacy of power are impossible without the participation of CSOs, citizens and the population. The issues of accessibility and openness of public authorities of the EaP countries have always been and remain important for the European community (Jang 2023). The mechanism of transparent interaction between the EaP countries and the EU has been and remains important. In the European understanding, transparency in the activities of public authorities of the EaP countries is associated with maximizing the openness and accessibility of information flows regarding public decisions made, their validity and effectiveness.

Increasing the level of information openness of public authorities is associated with the European political integration of the EaP countries. The Europeanization of political processes and CSOs is very complex and contradictory. It is based on democratic legislation and the activities of political associations created democratically on the one hand, and on the other hand, on European traditions and values, which, unfortunately, are not always and slowly implemented in the EaP countries. For

example, the political associations of Azerbaijan and Belarus are subject to various influences of an authoritarian and undemocratic, and sometimes non-civilianic and illegitimate nature.

In modern conditions, with the assistance of the EU, new broad opportunities for effective interaction between public authorities and civil society are opening up in connection with the development of information and communication technologies in the EaP countries. With the help of which it is possible to significantly reduce the distance between public authorities and civil society, as well as establish feedback, make public policy as accessible as possible. But, unfortunately, despite the fact that certain work is being done in the direction of information development, the state bodies of Azerbaijan and Belarus are not transparent enough, they remain closed to control by civil society, and the society itself is poorly informed about the activities of public authorities. In Azerbaijan and Belarus, the development and adoption of legislation on information openness of government bodies has become protracted and ambiguous (Jonasson 2024). This situation does not meet the relevance of the problem of regulatory support for the right to information in these countries, nor the European standards of freedom of access to information, the obligations for the implementation of which these countries have undertaken.

The problem of legal support for information openness of government bodies and the mechanism for access to it by consumers is particularly relevant in the context of the administrative reform carried out in Azerbaijan and Belarus. In order to assess the effectiveness of government bodies in the EaP countries, accessible, reliable, and trustworthy information on the conditions and results of their activities is needed.

## **Political Dialogue**

**Definition.** Political dialogue is above all the ability of public authorities to ensure constructive and pragmatic interaction. The forms of political dialogue are diverse: these are disputes, a wide exchange of opinions both in the audience and in the media; the purpose of the dialogue is to clarify the essence of phenomena, processes, points of view, to reach agreement on the issues under discussion, and most importantly, to carry out coordinated actions in the name of social cohesion and stabilization. Political dialogue is a determining condition for the development of a democratic political system, as it reflects the multi-party system of society.

The solution of the complex tasks of European integration that the EaP countries have faced since 2013 is impossible without an extensive social and civil dialogue between public authorities and CSOs, interest groups and active citizens. The effectiveness of government decisions, large-scale projects, and the success of virtually any significant social and political action depend on their support from CSOs. In order to be effective, current public policy must rely on public opinion and take into account the support of CSOs.

Figure 8. Political Dialogue of Civil Society

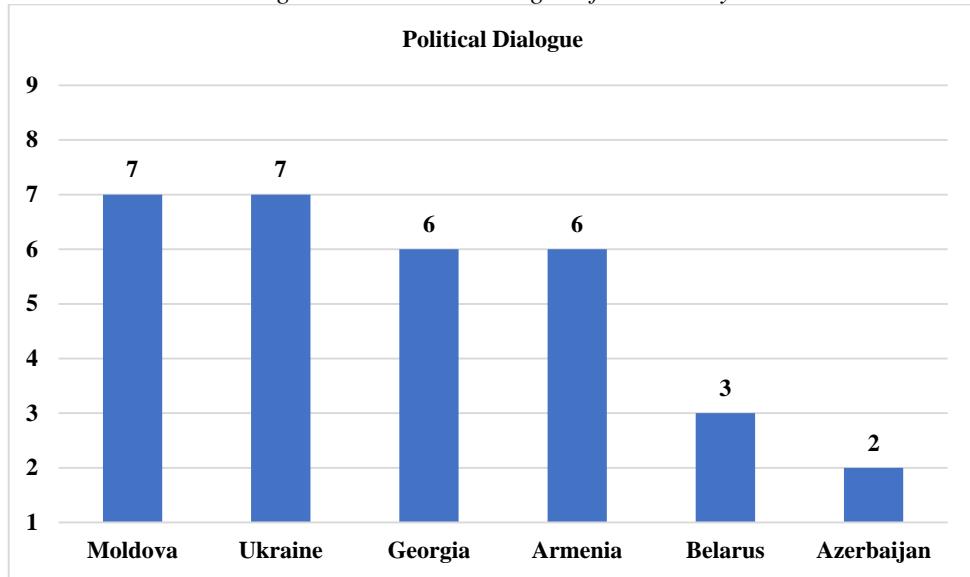


Figure 8 shows that among the EaP countries, Moldova, Ukraine, Georgia and Armenia have the best scores, as the long-term integration experience of these countries is considered very useful for the development of integration processes in the post-Soviet space. The EU supports the idea that in the EaP countries, political dialogue and public opinion should act as a means/channel of communication between CSOs and public authorities. It should be one of the effective instruments of civil society, with the help of which NGOs, trade unions, social movements and groups can promptly express their trust or distrust in public authorities and thus establish each time the measure of its legitimacy. At the same time, political dialogue and interaction of public opinion with public authorities is multifaceted. Public authorities themselves try not only to take public opinion into account, but also to shape the dialogue in the direction they need, also with the EaP Civil Society Forum (CSF). The reason for this may not necessarily be the interests of the political elite, but a more competent understanding of the current tasks of public policy. As is known, the competence of CSOs, as well as their ability to solve complex public problems, have specific limits in the EaP countries.

Important for our study are the successes and failures at different stages of the inclusion of civil society of the EaP countries in European integration, as well as the evolution of the institutionalization of EU relations with civil society at both the national and supranational levels (Council of the EU and the European Council 2024; Council of the EU 2022). As studies show, the participation of civil society of European countries in the integration of Azerbaijani and Belarusian CSOs was of a conflicting nature, since problems and contradictions arose on the path to creating and developing mechanisms for interaction between CSOs and EU institutions.

The study of the case of the mechanism of the dialogue of the EaP countries in principle seems to be especially relevant, since each of the six countries is one of the EU partner states. As a result of the dialogue, the trust in European institutions on the part of CSOs and the population gradually began to grow, while the ruling elites and new political forces often challenged the legitimacy of the existence of the permissive consensus, which the pro-EU elites had used since the beginning of the European construction of the EaP. It is characteristic that these two processes took place in the EaP countries simultaneously and were interdependent: on the one hand, critical sentiments towards the integration process began to appear in societies, and political parties, following their electorate, could not help but take this trend into account in building their political line, on the other hand, the political parties themselves ceased to treat the European project as a given and openly and publicly began to doubt its effectiveness where it did not correspond to their own interests and, thus, conveyed their doubts to society.

Despite the fact that after the Second Karabakh War of 2020 (Council of the EU 2022) and the Russian-Ukrainian War since 2022 (Müller and Slominski 2024), a number of studies have appeared on the party Euroscepticism of the EaP countries, conclusions about how critical these forces are of the EU are made mainly on the basis of individual bright statements, while, in our opinion, objective conclusions about the place of Euroscepticism in the policies of these parties can only be reached by finding a match between their anti-EU slogans and real actions. Due to the fact that in their domestic policies, these parties, being in opposition for a long time, could appeal to Euroscepticism in order to discredit the ruling political elite and pro-European political groups, it is of particular interest to study their international activities, where they did not have direct competition with the ruling political elite, which means that manifestations of Euroscepticism in it are independent and reflect the real goals and political line of the groups in question.

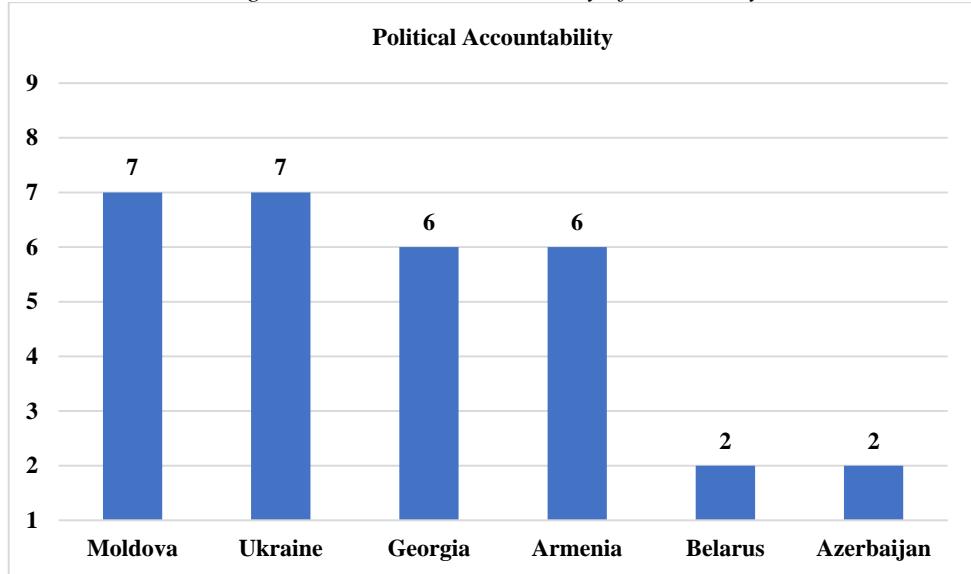
## **Political Accountability**

**Definition.** Political accountability refers to the responsibility of individuals, groups or institutions in the political sphere to be held accountable for their actions, decisions and policies. Political accountability is one of the cornerstones of representative government. Its absence can effectively lead to authoritarianism, containing the risk of long-term instability. In an accountable political system in the EaP countries, the president, government and parliament should be accountable to voters, political parties, CSOs and citizens to the greatest possible extent. Voters and political actors should be able to influence the composition of the government, either by changing the coalition of governing parties or by removing from power a party that has failed to deliver on its responsibilities. In European political discourse, the rules and procedures necessary for accountability and good governance are inextricably linked to democratic legitimacy.

In the post-Soviet EaP countries there is and continues to be a problem of accountability, a balanced model of separation of public powers and ways of organizing public power in the context of European integration. During the confrontation between the president, government and parliament, a special Moldovan,

Ukrainian, Georgian and Armenian model of constitutionalism was born. In contrast, in Azerbaijan and Belarus, an authoritarian regime and strong presidential power have strengthened.

*Figure 9. Political Accountability of Civiliancy*



Political accountability of the president and government to parliament in the EaP countries remains complex, despite the progress made in Moldova and Ukraine in this direction (see Figure 9). The institution of government accountability to parliament is developing in Moldova, Ukraine, Georgia and Armenia as an important component of the constitutional agreement, unlike Azerbaijan and Belarus, which is trying to become a link of accountability, according to which officials are responsible to ministers, who in turn are responsible to parliament, which is responsible to the people and civil society (see Figure 9). The constitutional practice of these four EaP countries recognizes individual and collective forms of government accountability, and is distinguished by the use of a wide range of ombudsmen.

Individual ministerial responsibility should be of a political nature as part of government and political accountability in the EaP countries, which in turn has two forms: 1) responsibility to parliament; 2) responsibility to the prime minister. It is assumed that the minister should be responsible for both personal mistakes, miscalculations, incompetence, and the actions of subordinates. According to our research in Moldova, Ukraine, Georgia and Armenia, the minister's responsibility to the prime minister and parliament is real, since the minister's incompetence becomes a reason for resignation. It is advantageous for the ruling party to publicly demonstrate this, thereby seeking to maintain the support of voters and CSOs. As for Azerbaijan and Belarus, the minister's responsibility to the president is more real than to parliament, since the minister's incompetence can be hidden for a long time, and it is

unprofitable for the president to demonstrate it due to the desire to maintain the support of voters. Therefore, resignations and dismissals due to incompetence have become a rare phenomenon in Azerbaijan and Belarus.

At the same time, the individual responsibility of a minister can in some sense replace the responsibility of the government as a whole, when guilt is officially recognized for a specific person, and not for the entire government, which will help to save the government from dissolution. At the same time, when a minister loses the confidence of parliament and CSOs, he or she becomes a burden for the government in Moldova, Ukraine, Georgia and Armenia. In these four EaP countries, the government has collective/command political responsibility to parliament through the following forms of control: vote of no confidence, questions and debates, opposition-initiated debates, standing committees, public hearings, etc.

## **Political Partnership**

**Definition.** Political partnership is a process that requires compliance with certain conditions in European integration: 1) readiness of the ruling party to develop partnership relations with the parliamentary opposition; 2) readiness of the political elite to develop partnership relations with parliamentary and non-parliamentary political parties, CSOs, civil movements; 3) awareness by all political parties of their role as initiators and key players in various political processes; 4) the desire of citizens to defend their interests, as well as the ability to defend their own initiatives; 5) the formation and subsequent development of an effective partnership mechanism among political parties.

The main forms of political partnership can be: regular negotiations; mutual consultations; thematic round tables; discussions and open communications; multilateral agreements; participation of representatives of political parties and CSOs, who gained more than 3% in elections to representative bodies of power and other working bodies of departments and government; expert activities in the framework of joint work on the development of draft laws. In addition, political participation presupposes recognition, along with institutional support, of broad rights and freedoms of citizens of the EaP countries to increase their political participation, as well as free elections, the results of which determine (directly or indirectly) the composition of the government. At the same time, it is fundamentally important to take into account the following: specific attempts at democratic transformations from 2013 to 2023 have sufficient grounds to be considered not only as isolated intra-state phenomena, but also as a more general process of global scale that transcends the framework of the EaP countries. At the same time, the model of such a process itself, many of its patterns, the interactions and interrelations involved in it are essentially transnational in nature, that is, again, they go beyond the specific EaP countries (Council of the EU and the European Council 2024).

Figure 10. Political Partnership of Civiarchy

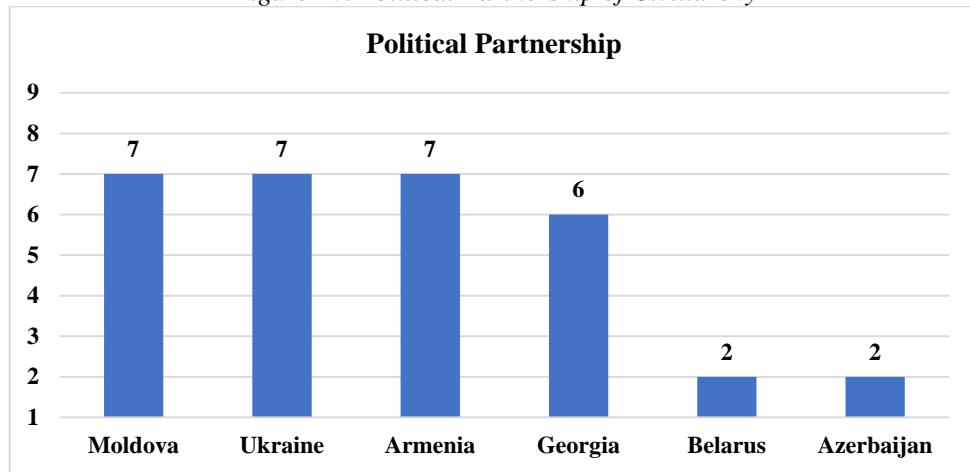


Figure 10 shows that among the EaP countries, Moldova, Ukraine and Armenia have the same scores, and Georgia is fourth in the ranking. One of such significant for the EaP countries in European integration is the formation of political partnership, since the partnership interaction of public authorities with diverse CSOs generates civiarchic consequences for all actors. Political partnership in Moldova, Ukraine, Armenia and Georgia is in constant motion: it is being improved, developed; it arises both spontaneously, on an initiative basis, and as a result of social design; it can generate agreement between the parties or conflicts. In Moldova, Ukraine, Armenia and Georgia, unlike Azerbaijan and Belarus, an essential element of the partnership type of political relations is mutual trust between the public authorities and CSOs, which are simultaneously the basis, a necessary condition for political partnership and its civiarchic result. The basis for the development of civiarchic partnership between public authorities and CSOs in the EaP countries is the relationship of mutual political trust and responsibility (Council of the EU and the European Council 2024). In this sense, we can link the relationship of political trust between citizens and public authorities, between CSOs and public authorities with the most important foundations of constitutionalism in the EaP countries, and the absence of such trust can be considered non-civiarchic or anti-civiarchic, that is, extremely dangerous for the basic foundations of the rule of law, democracy, and human rights.

Political partnership in the EaP countries is directly related to many constitutional principles (democracy; separation of powers; direct and representative democracy; protection of human and civil rights and freedoms; social nature of public authority; creation of conditions for mutual trust between public authority and CSOs) and is one of the mechanisms for their civiarchic implementation.

The constitutions of the EaP countries enshrine the modern principles of democratic and legal statehood, political diversity, the priority of human rights and the possibility of their protection, the direct effect of the Constitution, etc. At the same time, the main guarantee of the reality of these principles is the construction of systems of public authorities based on the separation of powers together with the inherent civiarchic

mechanism of checks and balances. However, both the practice of public life and our comparative analysis show that the named principles do not sufficiently predetermine the civiliarchic activity of public authorities. In this sense, the goal of European political integration of the EaP countries is to promote and support changes and clarifications of the most important elements of the civiliarchic model of separation of public powers. For full membership of the EaP countries in the EU, the model of separation of public powers established by the constitution of these countries, development and functioning in accordance with the democratic mechanisms of the EU is of key importance.

### Political Development

**Definition.** Political development is a process of changes in political systems over time leading to the improvement and advancement of governance, political institutions, policies and practices to better meet the needs and aspirations of societies. In this context an effective development policy must take into account the non-linear nature of social and political development in the EaP. It is necessary to develop a unified social development strategy, including infrastructure projects, plans for regional and local development, as well as initiatives from below. Among them: the intellectual potential and various social and technological innovations, the development and use of situational analysis and forecast centers for making managerial and political decisions, the use of numerous public and group initiatives from below, the social and cultural diversity of the regions of the EaP countries, the ability of most of their citizens to mobilize and concentration of efforts in the face of serious external threats, the potential for the development of small and medium-sized businesses in the high-tech sectors of the economy of the EaP countries, the reduction of bureaucratic pressure and the refusal to focus on purely formal indicators in science, education and other areas.

*Figure 11. Political Development of Civiliarchy*

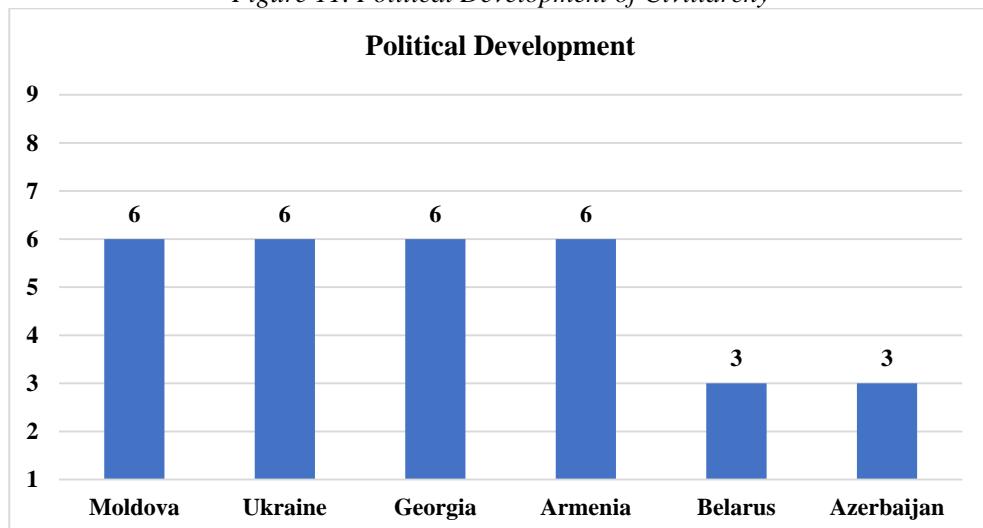


Figure 11 shows that among the EaP countries, Moldova, Ukraine, Georgia and Armenia have the same scores. The EaP countries have their own agendas for European integration as part of the 2030 Agenda for Sustainable Development. European resilient integration has become evidence that the concept of sustainable development has gained the status of a key and system-forming theory of global development in the 21st century. The expansion of the range of challenges and threats that the EaP countries have faced in the context of European integration since 2013 has determined the appropriateness of interpreting sustainable development as requiring the simultaneous solution of political, social, economic and environmental problems at the national and European levels. Thus, the EaP countries are faced with the urgent task of finding additional sources and innovative approaches to financing sustainable development and ensuring European resilient integration

The main characteristics and trends in the development of the political system of the EaP countries in the context of European integration reflect the specifics of transformation processes, representing a complex set of qualitative changes in the structure, functioning and methods of interaction of the political system with the regional environment. The institutions and value orientations of the EU simultaneously act in relation to the EaP countries and to each other both as a condition for cooperation and as a result of integration priorities. In the political transformation of the EaP countries, a number of problems were encountered that are typical for transition countries (high social costs of transformation, oligarchic form of ownership, spread of corruption, instability of democratic institutions). The transformation of the political system of the post-Soviet EaP countries took place in difficult geopolitical and regional conditions, since the traditional components of the value system, the established types of political consciousness, and the dominant strategies of political behavior to a certain extent prevented the assimilation of democratic norms and the rooting of democratic institutions. Therefore, democratic transformations in the EaP countries, as in most transition countries, are accompanied by value delegitimization of European political innovations.

The dangerous geopolitical environment and the limited social and economic base for the transformation of the political system of the EaP countries at the regional level determine the instability of democratic institutions and the high level of inversion of political processes in Ukraine, Moldova, Georgia and Armenia, which leads to the delegitimization of public authority. The success of political transformation is indicated by the depth of the multi-level integration process aimed at increasing the legitimacy and consolidation of society. The sustainability of the EaP societies depends both on the quality of the value system and on overcoming the problems associated with the formation of political resilience (limited social capital, deficit of democratic actors, misalignment of value priorities of groups of different statuses, gaps in political culture and consciousness, need and orientation towards a strong leader). Ignoring the main features, structure and mechanisms of political legitimacy on the part of the EU not only entails the emergence of various kinds of institutional distortions, but also generally affects the dysfunctionality of the result of transformation and European integration.

### Political Dimension of the Index of Civiarchy

According to the methodology, the level of political dimension of the EaP civiarchy index depends on the following 9 indicators listed above: security, participation, representation, control, transparency, dialogue, accountability, partnership, development. Comparative analysis of these interrelated indicators in the space of common neighborhood of the EaP countries as key foreign policy players of European political integration, their integration proximity to the countries of common neighborhood. The EU foreign policy resources are considered as a kind of starting point for the strategy of European integration of the EaP countries, and foreign policy is considered as a sphere of resilience, which is directed outward with the aim of influencing the EaP countries and actors of European integration to achieve interests, goals and disseminate European values.

*Figure 12. Political Dimensions of the Index of Civiarchy*

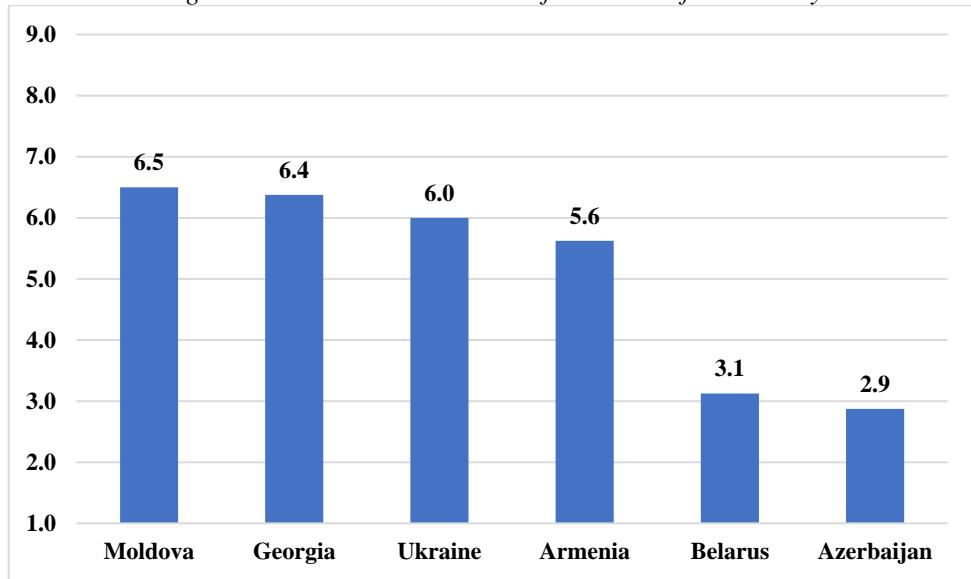


Figure 12 shows the ranking of the EaP countries according to the summarized Civiarchy Index data for the period from 2013 to 2023. According to these data, Moldova, Georgia, Ukraine and Armenia, unlike Azerbaijan and Belarus, have civiarchic prerequisites for further deepening of European political integration. We associate these data with the events that took place after 2013, which became the boiling point of Europeanization, as well as the point of confrontation between the EU and Russia over the future membership of the EaP countries. Among the events of 2013 were, among others, the Vilnius Summit of the EaP, the challenges of signing the Association Agreement with the EU by Georgia and Moldova, and the non-signing of Ukraine and Armenia. Due to the armed confrontation and conflict in the East of Ukraine with Russia, Ukraine was able to sign the AA later, and Armenia began new

negotiations on revising the AA with the EU, which led to the Armenia-EU Comprehensive and Enhanced Partnership Agreement (CEPA), which was signed on November 24, 2017.

The EU became an external factor for Armenia, Azerbaijan, Georgia, Belarus, Moldova and Ukraine, which had a decisive influence on the formation of a common neighbourhood from six post-Soviet countries (Rogov 2013). At the same time, Azerbaijan and Belarus were not fully united within the framework of a single institutional scheme created by the EU, due to consolidated authoritarianism, domestic political instability and/or an unfinished process of dependence on Russia, and in the case of Azerbaijan, also an alliance with Türkiye.

By the end of 2013, the EU had already realized the competitive nature of its relations in the common neighborhood, as the EU's resource potential began to increasingly collide with Russia's resources. Russia and the EU, despite the declared differences in the methods of implementing foreign policy, have created various cooperation formats for states along their borders, that is, the broadest possible in terms of the composition of participants and the range of issues under consideration, which gradually began to have a rigid character, violating the previously established general framework for interaction. Such formats, created for the purpose of maintaining contacts with their neighbors and involving them in more active bilateral relations, include the CIS and the European Neighborhood Policy (ENP).

In the European political integration of the EaP countries, there is a discrepancy between the existing institutional characteristics of their political systems and values, which hinders democratization. The gap is the result of the reproduction of the mobilization model of development by the political system of the EaP countries. In this regard, new tasks of political research and determination of the measurement of the Civiliarchy index are becoming relevant, which contribute to overcoming destructive anomic phenomena and forming value foundations of political changes that ensure sustainable social and political development of the EaP countries. Therefore, the relevance of this study is determined by the following factors: firstly, the need for in-depth understanding of political phenomena in unity with social and cultural processes of European integration underlying social, political and cultural development of the society of the EaP countries; secondly, the need for a detailed analysis of the mechanisms of sustainability of political development at the regional level in the context of European integration and transit; thirdly, strengthening the role of CSOs to ensure effective political governance in the context of civiliarchic transformation. There is a need for scientific knowledge reflecting, on the one hand, the essence of social and political dimensions of European integration of the EaP countries, and on the other hand, the formation of new management tools and technologies of European integration based on modern methods that affect the sustainability of political development of the EaP countries; fourthly, the need to overcome social and cultural faults between the public and CSOs in the perception of the vector of European political transformations; the need to develop European civic culture.

Civiliarchic transition, institutionalization of democratic rules and procedures in the post-Soviet EaP countries, which entailed changes in political culture and behavior of citizens, have exacerbated the need to study the patterns of interrelation of institutional

and non-institutional factors that influence the resilience of the political systems of the EaP countries. For theoretical understanding of the mutually laid foundations for the study of factors and mechanisms of formation, variability and conditions of functionality of civiliarchic changes in European integration. These studies allow us to significantly expand the factual and analytical base of the article, presenting governance in the integrity of European political integration, analyzing the political space in the EaP countries, comparing them with other spheres of European public life.

*Figure 13. Three levels of political dimensions of the Civiliarchy Index:  
Impidied Civiliarchy, Evolving Civiliarchy, Enhancing Civiliarchy*

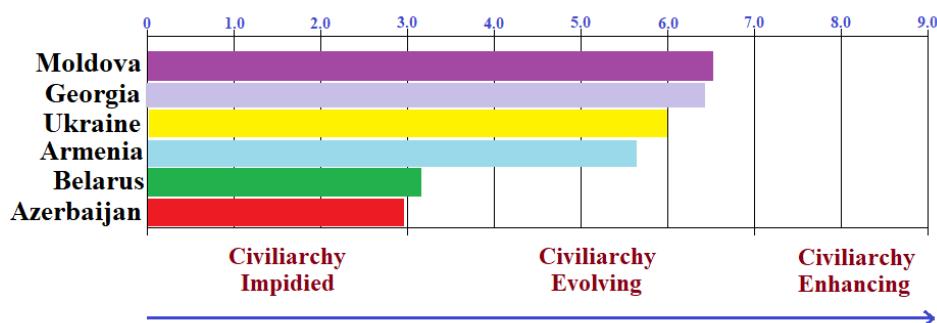


Figure 13 shows that the Civiliarchy Index uses a nine-point scale from 1 to 9 to rank the Civiliarchy levels of the EaP countries, which was explained above. From Figure 13 it is also clear that Moldova, Georgia, Ukraine and Armenia have a level of Evolving Civiliarchy, while Azerbaijan has a level of Impidied Civiliarchy. In this sense, it is important to note that all EaP countries still have much to do to develop civiliarchy and deepen European political integration. Based on the analysis of support to governments and parliaments, social groups and CSOs in the European political integration of the EaP countries, the ruling parties of these countries play an important role in the integration processes, helping to ensure the efficient and effective use of public resources.

Linking European political integration with the EaP countries' priorities for civiliarchy, democratic needs and human rights can enhance its impact on poverty reduction and inclusive growth. Based on these principles, the EU intends to strengthen its support to the EaP countries' efforts to strengthen domestic systems of political accountability, enhancing the role of CSOs in anti-corruption policies, alongside parliaments, high political partnership institutions, public budget oversight agencies and social media. The EU will support the efforts of EaP CSOs to effectively participate in these systems in the long term, including at the local level, where a wealth of diverse and innovative approaches is emerging in the field of political accountability, including through the use of new technologies.

## **Conclusion and discussion**

In the EaP countries, one of the most important development problems is maintaining the necessary level of political stability of democratic institutions to organize their effective activities (Aleksanyan 2018b). The problems of the formation of ciliarchic democracy, for all their specifics, are not unique, and therefore may have solutions similar to the experience of other states. The logic of the post-Soviet development of the EaP countries and other countries testifies to a single set of tasks for implementing the principles of institutional democracy. Of course, this does not lead to the conclusion about the possibility of live broadcasting of European analogues, but attention to them is of particular interest, since it demonstrates different approaches to solving the problems of democratic transition, and from the point of view of the results of democracy consolidation achieved so far, it can serve as a description of possible development prospects democratic institutions of power in the EaP countries.

The formation of a new system of political relations in the EaP countries has a number of features that are not sufficient to determine the qualities of the previous era. Studying the positive and negative experience of democratic transition and subsequent consolidation of social democracy in the countries of the region is of interest from the point of view of developing new approaches to studying the problems of the transition period. The process of formation of the institutional structure of a democratic regime in these states attracts attention by the variability of forms and manifestations. The study of national models of transition to democracy raises a very important question about the adequacy of the choice of ways to consolidate democracy, when there is a natural comparison of the values of the entire civilization and the selection by nations and their public of its achievements. Based on the assumption that the more developed a country is in social and economic terms, the less the polarization of society in it, the more grounds there are for putting forward goals that are revolutionary in content and achieving them by evolutionary methods, the Armenian, Georgian and Moldovan experience attracts special attention. The transition in these countries, denounced in various forms in outward expression, led to a single result of the breakdown of the totalitarian system of political rule.

A significant research problem is the uncertainty of the results of the democratic process, which involves different social and political forces with different goals, interests and capabilities. The Georgian national model of transition is interesting not only for the outward manifestations of the dialogue of political elites (Dzebisashvili 2024), but also makes it possible to consider the problem of linearity of political processes at an empirical level, not so much in the framework of the theory of modernization, but in the context of correlating the processes of liberalization and democratization (Lacher and Wamsley 2023). In addition, the choice of study countries is associated with problems of stability and efficiency of the state entities themselves in the conditions of not only political, but also social and economic transformation, and here, the negative experience of the Armenian in trying to maintain the unity of the country with a high level of development and activity of political actors, generates interest to the personal side of democratic transition. First of all, the role of political elites is important.

The process of European integration, which has been changing the political, economic and social image of Europe since the second half of the 1990s, is gaining momentum. The prospects for successful integration of the EaP countries are largely determined by the level of their political development, including the stability and adequacy of democratic institutions in the internal situation. The European direction has always been one of the priorities of the foreign policy of these countries. Although after 2020, the attention to European political processes in Azerbaijan and Belarus has significantly weakened and is on the decline, both political and economic interest in the countries of the region, which in turn requires an understanding and objective perception of the ongoing processes. At present, a decade after the beginning of the transition, it is relevant to identify and evaluate the preliminary results of democratic transition, not so much from the standpoint of the prospects of the process, but from the standpoint of its results.

The history of the political development of the EaP countries in the post-Soviet period indicates that the establishment of the principles of ciliarchic democracy in the political life of society is associated with the effectiveness of the state and its institutions. In general, the effectiveness of the state is the most important criterion for the consolidation of democracy, while the absence of a strong state, in turn, can lead to the discrediting of democracy (Aleksanyan 2019; 2017). Determining the effectiveness of the state is possible according to various criteria, nevertheless, it seems to us that in the political sphere, the institutional approach can serve as such a tool for changing the effectiveness of the state. Since the study of the democratization of political institutions makes it possible to identify a number of country and historical features, to determine further prospects for the political development of the states under consideration.

A comparative analysis of democratic transitions in the countries under study makes it possible to single out several main qualitative characteristics of ciliarchic democratization at the subregional level. All countries are characterized by differences in the pace of transformation of the highest bodies of state power and party systems. Power institutions have gone through the path of transformation much faster than political parties. Here, the direct dependence of public authorities to effectively manage political processes on the adequacy of the perception of democratic norms by political actors is revealed. Formal consolidation of the principles of institutional democracy in the constitutions, without their real development by political actors, is completely insufficient to define new political regimes in the post-Soviet countries as institutionalized democracies.

The lag in the transformation of party systems gives rise to the danger of destabilization of government institutions and the establishment of populist regimes, which is not excluded for any of the countries under consideration. One of the essential characteristics of the transit of the EaP countries is to overcome the logic of revolutionary development. Indeed, in the EaP countries, the revolutionary political processes of the beginning of institutional democratization were denounced in the form of broad democratic movements, the demands of which the authorities do not fulfill, or were forced to fulfill. Here we are dealing with a more multifaceted phenomenon than revolution. A broad transitological interpretation of the political phenomena of the last

decade in the states under study is more adequate to the realities of post-socialism, given the uncertainty of their final result.

The identification of regional trends and factors of influence and country-specific features of the process of institutional democratization allows us to assert that external factors had a decisive influence at the initial stage of democratization, which resulted in the overthrow of the totalitarian regime of the USSR, and at the stage of consolidation of democracy, internal trends acquire paramount importance. Significant mutual influence of national models of transition, however, can be traced at the regional level. If democratization is viewed as a global phenomenon caused by corresponding large-scale causes, then the choice of model: revolution or transition is associated exclusively with internal development trends, and, to a lesser extent, with the influence of neighbors (Jang 2023).

Determining the adequacy of the statutory normative and legal requirements for democratic institutions of power, the post-Soviet political reality required not only a comprehensive study of the legislative acts themselves, but also an analysis of the transformation of the legal system of the countries under consideration. The main attention was drawn to the problems of implementing democratic procedures in the activities of political institutions. Despite the fact that in 4 countries the political elites strive to comply with formally democratic rules and procedures, in our opinion, the legislation of Armenia, Georgia, Moldova and Ukraine still, like the legal system, suffers from.

### **Supplementary material**

The supplementary material for this article can be found at <https://doi.org/10.46991/JOPS/2024.3.9.097>

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**Conflict of interests**

The authors declare no ethical issues or conflicts of interest in this research.

**Ethical standards**

The authors affirm this research did not involve human subjects.

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## UNDERSTANDING THE DYNAMICS OF TRANSITION OF THE WOMEN'S MOVEMENT IN ARMENIA: CHALLENGES FOR DEMOCRATIC REPRESENTATION AND INCREASING POLITICAL INFLUENCE

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### Abstract

The article analyzes the origins of women's social movements in the transit Armenian NGO network, which are closely linked to the emergence of modernity, where capitalism, state-building, urbanization and other factors created conditions for collective action. The results of women's civic initiatives are divided into direct results, such as changes in public policy, and indirect results, such as shifts in public opinion. The article draws attention to the fact that women's movements in Armenia are distinguished by the fact that they are future-oriented, ideologically driven and more inclusive than other civic initiatives. These new movements are often devoid of hierarchical structures, advocate for horizontal cooperation and are often marginalized by the media and public opinion. In this sense, the aim of this article is to analyze the resilience of women's movements in Armenia using the theory of civil society and political transformation of post-Soviet countries, focusing on the quality of political institutions and regimes, mobilizing social networks and protest cycles. The theoretical and practical position of this article reveals the peculiarities of the development and effective political adaptation of the women's community in the context of European integration of Armenian society. The main provisions of this article contribute to further research into the problems of women's political adaptation in a transitional economy, identifying the main directions for establishing gender equality as one of the priorities of public policy, as well as strengthening the political activism of women in Armenia.

**Keywords:** women's movements, women's rights, NGOs, radical groups, gender-sensitive policies, women's representation, domestic violence, political space, activism, political opportunities, social movements.

### Introduction

For a long time, political and social movements were exclusively a male sphere, and the mass entry of women into government and parliament is a relatively new phenomenon. Despite the proclaimed equality of the sexes and the widespread use of

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political correctness in many spheres of life in Armenia, it must still be recognized that many people's stereotypical ideas about politics are primarily associated with men. A female politician acts as a kind of deviation from the standard, which is reflected in Armenian media discourse (Akisheva 2023; Jeroense, Luimers, Jacobs et al. 2022). The question of inequality is fundamental for women's social movements both in previous years and in modern societies. Social stratification is one of the key tasks of political and social research, around which many scientific and ideological disputes have been and are being conducted. The main ones are differences in property, power and status. Political researchers of women's social movements have asked the following questions: why are some groups in society prosperous or have more power than others; how does inequality manifest itself in modern societies; why does poverty continue to exist in modern developed societies (Paxton, Hughes and Green 2006; Antonyan 2023; Forester and Mazur 2024).

Traditionally, social movements in 1960s had focused mainly on issues of labour and national while since then we have witnessed not only an increase in new forms of political participation which changed the quantity and quality of protests and prompted significant innovations in social scientists' approach to these questions (Jeroense, Luimers, Jacobs et al. 2022; Porta and Diani 2006; Aleksanyan 2021). To describe and interpret women's social movements that fought against social stratification, which meant a vertical cross-section of the social structure, revealing the place of women's specific social groups in the system of social hierarchy. In this context, Armenian transit societies are also considered as consisting of 'strata' ordered into a certain hierarchy: groups with the highest statuses at the top and the lowest statuses at the bottom (Tilly 1984; Tilly 1985; Linden and Mitzman 2009; Weldon 2024).

The political outcomes of social movements can be divided into two broad categories: direct outcomes, such as a movement-generated change in public policy, and indirect outcomes, such as changes in public opinion on a specific issue (Lebanidze, Aleksanyan and Gonashvili 2022). Within these broad categories, scholars have developed more specific outcome typologies, focused primarily on policy outcomes (Shevtsova 2023).

Social movements are a phenomenon that became relevant in the 1960s of the 20th century, covering many different forms of collective action aimed at social reorganization. The goals of women's social movements can be broad, such as changing the system of power, or narrow, such as installing devices that limit or slow down the movement of vehicles on a street in the suburbs. Some social movements are distinguished by a high degree of organization, the presence of a well-developed bureaucracy and leadership, while others are mobile and informal (Tarrow 2008; Tilly, Castañeda and Wood 2019; Tarrow 1998, 106-122).

With the advent of innovative technologies, the forms of governance in women's social movements are also changing. It can be assumed that not only the processes of interaction between participants, but also the processes of coordination and governance are partially or completely, actually or formally carried out online. The online form assumes the possibility of rapid coordination of a large number of people and the ability to track their various activities. Since it is technical means that provide such an opportunity, a new form of centralization appears. The social movement perceives the

online form as a means under its control. On the one hand, each participant in the social movement is equal with other participants in the communication process, on the other hand, there are participants who moderate this communication, organize technical support, and they have more power than other participants. Thus, the new form assumes both a non-hierarchical and a hierarchical aspect. On the one hand, the online form is a continuation of the non-hierarchical system that is characteristic of social movements, on the other hand, it provides an opportunity for centralization and hierarchy.

From early 2000s series of NGOs and grassroots civic initiatives started to emerge in Armenia. The number of such initiatives, as a new form of political participation, started to increase. In 2010s there were more than 30 such initiatives both in the capital Yerevan and in other towns of the country (Ishkhanyan 2014). The ambition towards building a democracy was seemingly the underlining theme for all the initiatives which then explained a certain level of trust and cooperation among themselves (Exadaktylos et al. 2024). The initiatives were informally joining the efforts in some of the concrete processes. One of the key directions of those movements were led by women's groups, by NGOs and civic initiatives, who were stressing the women's situation in the country and an urgent need to change it.

In Armenia women's movement are different from other movements in the following ways: women groups are future oriented, pro-active and ideologically driven, are more inclusive than other civic initiatives and movements, have minimal hierarchy, more cooperation on horizontal level, have less media access and general support due to public attitude and get more targeted, prefer not to use street as the main space for protest, take and discuss issues multidimensional, are always concerned by security issues and are only or mostly represented by women (Aleksanyan and Aleksanyan 2021).

Globally, movements on women's rights have long served as a transformative force in challenging and redefining societal structures and has sought to address the systemic oppression of women, advocating for the advancement of their political, social, and economic rights. The movements have been instrumental in shaping social, political, and cultural landscapes, confronting patriarchal systems that have long marginalized women. Feminist academic work on women's movements not only chronicles their accomplishments but also explores the intricate dynamics of resistance, identity formation, and collective action within these movements.

As feminist scholarship developed, intersectionality became a fundamental framework for understanding the complex and interconnected systems of oppression that women encounter. The contributions of black feminists, such as Selina R. Stone (2024) and Miriam Hinz (2024), significantly expanded feminist theory by highlighting how race, class, and sexuality intersect with gender-based oppression. This critical analysis reshaped the feminist movement, ensuring that the struggles of women of color, working-class women, queer women, and other marginalized groups were not overshadowed by the dominant narratives of white, cisgender, heterosexual feminism. The feminist academy plays a crucial role in critically examining these movements, bringing to light the histories, ideologies, and resistance strategies that drive women's liberation globally.

The purpose of this article is to look at the political context, mobilizing structures, framing processes, protest cycles and contentious repertoires of the women's movement in Armenia from the perspective of Political Processes theory.

### **Political context and opportunities**

In the context of European and Eurasian integration processes, Armenian social movements are studied extremely rarely, often only the impact on society and public authorities is studied using keyword search methods through various mechanisms and projects. Many social movements have political goals, but not all of them are political parties. The liberal approach presents women's social movements as groups of supporters of the same ideology. The Marxist interpretation is based on the understanding of women's social movements as bearers of the interests of a particular layer. The structural (organizational) approach sees women's social movements as a mechanism, system, apparatus for interaction between citizens, deputies and members of political parties (Bloom 2014; Jeroense, Luimers, Jacobs et al. 2022). For this, the institutionalization of women's social movements, ruling and opposition political parties is of great importance (Sarter, Hegarty and Casini 2024).

From the late 1990s to 2018, Armenia was seen as a semi-consolidated authoritarian regime marked by restricted political freedoms, weak democratic institutions, and a repressive political climate. The government showed little interest in human rights and often suppressed women's groups and activists advocating for gender equality and social justice, silencing dissent and ignoring calls for policy reform. However, the 2018 peaceful revolution, driven by widespread discontent with entrenched elites, transformed Armenia's political landscape. This non-violent movement led to the resignation of Prime Minister Serzh Sargsyan and ushered in a more open environment under Nikol Pashinyan, signaling a slight positive shift in the government's approach to civil society, including women's rights and marginalized communities.

The most notable advancements in women's rights following the 2018 revolution include the adoption and implementation of the Armenian Gender Strategy<sup>1</sup> (2019-2023), the approval of the National Action Plan for the UN 1325 Resolution on Women, Peace, and Security<sup>2</sup>, a doubling in the number of women MPs in the 2021 snap elections, and the establishment of the first-ever state-sponsored regional shelters for victims of domestic violence<sup>3</sup>. However, the progress was significantly disrupted by the COVID-19 pandemic and the 2020 war. The pandemic exposed the state's reliance on gender-insensitive mechanisms in social assistance programs, highlighting a critical area needing reform. Additionally, reports from the police and hotline services

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<sup>1</sup> The Strategy and Action Plan for the Implementation of Gender Policy in the Republic of Armenia for 2019-2023. October 11, 2019 (in Armenian). Accessed October 13, 2024. <https://www.arlis.am/DocumentView.aspx?DocID=134904>.

<sup>2</sup> National Action Plan for the Implementation of the Provisions of UN Security Council Resolution 1325 on Women, Peace and Security for 2019-2021 and the Program Implementation Schedule. March 21, 2019 (in Armenian) Accessed October 13, 2024. <https://www.arlis.am/DocumentView.aspx?DocID=128902>.

<sup>3</sup> OxYGen Foundation. 2021. Gender policy concept paper for political parties. Yerevan. Accessed October 13, 2024. [https://oxygen.org.am/wp-content/uploads/2021/03/GenderPolicyConceptPaper\\_PolitPart\\_ENG\\_final.pdf](https://oxygen.org.am/wp-content/uploads/2021/03/GenderPolicyConceptPaper_PolitPart_ENG_final.pdf).

indicated a sharp rise in domestic violence cases as many perpetrators, predominantly men, remained at home during lockdowns.

In response to COVID19, women's groups pivoted during the pandemic to address urgent needs, distributing food and hygiene supplies, offering re-skilling programs to help women adapt to a shifting job market, and increasing support for domestic violence victims (Cardoso, Nalbandov and Rocha 2023). These efforts were carried out in partnership with state institutions, though regional NGOs often demonstrated greater expertise and capacity than government agencies, resulting in highly effective collaborations. This model of cooperation was further solidified during the 2020 war, fostering stronger state-NGOs relationships and establishing a framework for joint crisis response efforts.

During the 2020 Nagorno-Karabakh war, women's issues, like many others, largely disappeared from the authorities' agenda, prompting women's groups to shift their priorities significantly (Karlinsky and Torrisi 2023). Between 2020 and 2024, these groups primarily focused on integrating women's security into the broader human security agenda, highlighting the heightened vulnerability of women during the conflict. Militarism became increasingly prominent within the NGOs community, accompanied by a rise in nationalism that often targeted women's and LGBTQ+ groups (Sjöholm 2022; Barrientos and González 2022). Building on their collaborative experiences with the state during the COVID-19 pandemic, NGOs provided critical support to refugees in 2020 and 2023 Refugee Crisis, particularly women, while also organizing and delivering much-needed aid to the front lines (Cardoso, Nalbandov and Rocha 2023).

Between 2020 and 2024, women's groups prioritized several key areas: providing psychological support for women refugees, lobbying for a peace agenda that included the implementation of the UN1325 National Action Plan, and advocating for state benefits for women living along the Armenia-Azerbaijan border. However, a notable shift occurred in the post-war period, with women's groups entering a phase of introspection and reevaluating their priorities. This shift, often described as the 'localization of women's problems', reflects a move towards addressing issues guided by local needs rather than donor-driven agendas, which were often criticized for lacking transformative impact. The changing public space after the war significantly influenced this reorientation, reshaping the focus and strategies of women's movements.

The experience of cooperation between the state and NGOs during the pandemic and war highlighted the value of such partnerships and demonstrated the critical role of civil society in responding to crises (Council of Europe 2022). It also underscored the importance of a gender-sensitive approach to both social assistance and emergency response, providing a valuable lesson for future policymaking. Despite these positive changes, one area that remains challenging is the mechanism through which civil society can influence decision-making on sub-legislative normative acts. Public councils, designed to provide civil society representatives with an advisory vote and encourage broader participation in policymaking, have not always been effective or influential in practice. While these councils were established with the intention of enhancing civil society's role in governance, their actual impact has often been limited.

The experience illustrates how women's movements in Armenia navigated shifting political landscapes, responded to crises, and adjusted their strategies in pursuit of gender equality, while also grappling with systemic challenges in influencing policymaking.

### **Mobilizing structures**

Mobilization refers to the process of organizing and activating existing entities within a community or society to promote change. These entities, whether political, social, or grassroots, provide the necessary infrastructure—such as membership, leadership, and communication networks—that support a social movement (Amro and Purohit 2023). In the case of women's rights movements, mobilizing structures often include both formal and informal organizations that work together or separately to address gender inequality. However, in Armenia, there is no unified women's movement or cohesive agenda that brings together the various women's groups working on similar issues. Although there are numerous groups addressing women's concerns, from domestic violence to economic inequality, they do not collaborate effectively or form a cohesive strategy for advancing women's rights. Each organization operates independently, often following different tactics, ideologies, and strategies to address shared challenges.

The lack of cooperation among these groups is partly due to the differing levels of consciousness within the movement and the diverse approaches used to tackle gender-related challenges. While all these organizations are concerned with improving the status of women in society, their methods for achieving this goal vary widely. Some may focus on policy reform, others on community-based initiatives, and some on advocacy through media and public awareness campaigns. This fragmented structure makes it difficult for women's organizations in Armenia to create a collective, unified front that could advocate more powerfully for gender equality. The Armenian women's movement includes a broad array of stakeholders, such as NGOs, non-formal activist groups, research organizations, media, and the Diaspora. These diverse groups form part of a larger network working to address women's issues, but their interaction is limited by differences in structure, approach, and goals.

NGOs are the more formalized organizations in the network. They tend to have a hierarchical structure with internal rules, clear governance mechanisms, and a degree of accountability to the government and the public. Their formal status allows them to access funding, collaborate with state institutions, and engage in policy advocacy, but it also means they are more likely to be subject to state scrutiny and regulation (Kaufer 2023). On the other hand, non-formal groups are informal, often grassroots initiatives that lack official registration, formal leadership structures, or accountability to the state. These groups are more flexible and quick, operating without bureaucratic constraints, but they also face challenges in terms of sustainability, resources, and influence. Because they are not legally bound or registered, they can often take more radical positions or engage in more direct forms of activism. However, their lack of formal status also means they are more vulnerable to repression or lack of visibility in the policy-making arena.

The existence of these two distinct types of organizations—NGOs with formal structures and non-formal groups with flexible, decentralized frameworks—creates both opportunities and challenges for the women's movement in Armenia. On one hand, NGOs bring professionalism, legitimacy, and the ability to collaborate with government bodies, but their more bureaucratic nature can make them less responsive to urgent grassroots issues. Non-formal groups, while more responsive and innovative, often struggle with a lack of resources, legal recognition, and formal influence in decision-making processes.

Ultimately, the fragmentation of women's organizations in Armenia reflects a broader challenge for social movements: how to bridge the gap between formal, institutionalized organizations and informal, grassroots activism. This division may hinder the potential for a unified and powerful women's movement capable of effectively pushing for significant, structural change in the country's gender policies. For the movement to advance, there would need to be greater coordination between these two types of organizations, as well as a shared understanding of the most pressing women's issues and how to tackle them effectively in the context of Armenia's political, social, and economic environment.

### **Women's NGOs in the development of women's civilizational activity**

The most important condition for solving gender problems in Armenian society is women's NGOs and their active dialogue and social partnership with state structures, political parties and public initiatives, as they are the link between the state and civil society in the context of European integration (Aleksanyan 2024). Therefore, achieving gender equality is an important part of the development strategy, which is designed to give everyone the opportunity and right to avoid poverty and improve their standard of living (Grigoryan 2023; Asoyan 2021; Hastings and Mikayelyan 2022; Kaser 2021).

In the context of the European political integration of Armenia, it is not just a rethinking of women's NGOs, but also many primary ideas, stereotypes, and the rejection of old dogmas. The experience of women's NGOs shows that achieving equality between men and women is a long-term process, during which it is necessary to change all existing stereotypes about the role and status of women and men in Armenian society. In this regard, it is necessary to actively involve women's NGOs in the development of such a policy, since women working in public administration, as a reality of modern society, have not become the subject of close sociological and political analysis, although the essence of women's government requires gender research (Aleksanyan and Aleksanyan 2022). The study of the role of women's NGOs in public administration has not yet received due scientific development.

In sociological and political studies, the tasks of women's participation in the political life of Armenian society and women's representation were considered only in the most general formulation of the question. In sociological and political studies about the Armenian reality, the study of the social group of women in the political life of society, as well as representation, begins with European integration. In recent years, women's NGOs have been actively engaged in issues of the theory and practice of the

role of women, which also provide an analysis of the process of increasing the role of women in Armenian society.

In this regard, it is important to understand the experience of women's NGOs, which is associated with the creation of favorable conditions for women's participation in the political life of the new society (Chamie 2022; Ana 2024). Therefore, in the framework of this study, I would like to see a number of NGOs as a key part of the NGO network dealing with women's issues and aimed at filling the gap regarding the role of women in the political life of society: 1) Women's Resource Center<sup>4</sup>, 2) Women's Support Center<sup>5</sup>, 3) Women's Fund Armenia<sup>6</sup>, 4) Women's Rights House, 5) "Winnet Armenia" Network of Women Resource Centers, 6) Coalition to Stop Violence Against Women, 7) Women's Agenda, 8) Martuni Women Community Center, 9) Yerevan State University's Center for Gender and Leadership Studies, 10) Woman and Society Information Analytical portal founded by members of "WomenNet" NGO, 11) Sexual Assault Crisis Center, 12) Agate Rights Defense Center for Women with Disabilities, 13) The Women's Center; 14) Kanani NGO, 15) You are not alone NGO, 16) Sose NGO.

Non-formal groups dealing with women's issues:

- Fem House (Fem Library) Armenia is a feminist community that aims at creating a safe space for feminist organizing, collaboration and resistance. It brings together and intertwines feminist activism, art and academia in the spirit of feminist solidarity and sisterhood.
- Queering Yerevan group is a collective of artists, writers, cultural critics and activists queering and using Yerevan as an experimental space<sup>7</sup>.
- Queer Sista is queer young feminist initiative, aiming to create safe spaces for lesbian, bisexual women, trans and queer people by promoting solidarity, mutual support, and well-being.
- Adolescent Girls of Charentsavan "Girls are Power" - Adolescent girls organize a series of meetings among their peers in their community. Psychological and art trainings, seminar-discussions about feminism will be implemented.
- Voice to girls want to show that girls have the right to vote, their voice is heard, and their rights are protected, they have opportunities to do what they like without being ashamed, stereotyped, and discriminated against. They hold meetings and discussions in their school to find out the problems of the girls studying there and to solve them.
- Girls Talk initiative is an initiative of a group of young girls. Through art-activism, they try to make visible the problems that the girls and women living next to us may face.

<sup>4</sup> "Women's resource center" NGO. 2022. Annual Report. Accessed October 13, 2024.

[https://womensofarmenia.org/wp-content/uploads/2023/04/WRC-Annual-Report-2022\\_eng.pdf](https://womensofarmenia.org/wp-content/uploads/2023/04/WRC-Annual-Report-2022_eng.pdf).

<sup>5</sup> "Women's Support Center" NGO. 2020. Challenges and gaps in Armenia's response to domestic violence. Yerevan. Accessed October 13, 2024.

[https://www.womensupportcenter.org/DOMESTIC%20VIOLENCE\\_GAPS%20-ENGL.pdf](https://www.womensupportcenter.org/DOMESTIC%20VIOLENCE_GAPS%20-ENGL.pdf).

<sup>6</sup> Women's Fund Armenia. 2024. "Publications." Accessed October 13, 2024.

<https://womensfundarmenia.org/publications-by-wfa/>.

<sup>7</sup> The Queering Armenian Library. 2024. Accessed October 13, 2024. <https://queerarmenianlibrary.com/queering-yerevan/>.

- Women 40+ initiative is a groups of women above the age of 40 who in their communities campaign about the rights of 40+ women,
- Women in Black Armenia Initiative,
- Sexism in Armenia facebook group talks about the widespread sexism in Armenia via visual means.

### Framing processes

In order to establish the framing of women's social movements that will be relevant for this study, it is necessary to rely on the theory of social movements in transitional societies. Framing processes of women's social movements means analyzing the network of formal and informal interactions between multiple actors (individuals, groups, organizations) involved in the political process for making public decisions and based on a social/collective shared identity (Rupp and Taylor 1999; Paxton, Hughes and Green 2006). In the context of the transformation of Armenian society, framing can be used as "conscious strategic efforts by groups of people to fashion shared understandings of the world and of themselves that legitimate and motivate collective action." (McAdam 1996; Gamson and Meyer 1996).

Some academic schemes for categorizing feminist movements in the past include 'social feminism' and 'hard-core feminism' (Cott 1989; Bardall 2023) or 'social feminism' and 'equity feminism' (Black 1989). In this sense, a social movement is a collective challenge (to elites, authorities, other groups or cultural codes) of people with common goals, solidarity in sustainable interaction with elites, authorities, opponents. At the same time, it distinguishes social movements from political parties or interest groups (Tarrow 2011). Therefore, the women's social movement is a form of political association between people who at least minimally feel connected to others in a common goal and who unite over a long period of time to implement social changes in the name of this goal (James and Van Seters 2014). Thus, the following dimensions of the women's social movement can be distinguished: 1)Focus on collective reorganization, social changes; 2) Having a common value; 3) Having a collective identity; 4) Practical actions aimed at social changes; 5) Participation in cultural or political contradictions.

In Armenia, on an ideological level, one can identify various groups such as liberals, socialists, and anarchists. However, it would be misleading to discuss them solely from this perspective, as there are no fully developed or cohesive ideological movements within the country. On a tactical level, it is possible to categorize groups into two broad approaches: radical and reformist. Structurally, these groups can be divided into NGOs and grassroots initiatives. NGOs tend to lean more towards reformist approaches, while grassroots initiatives are often more radical.

NGOs have well-established governance structures, formal systems, protection mechanisms, and stability, with vertical relationships and a clear division of responsibility. Most NGOs in Armenia adopt liberal or social agendas and pursue reforms within existing frameworks (Paturyan and Gevorgyan 2021). Even when NGOs aim to be more radical, they must adopt a communication style that resonates with the broader population and political parties to maintain relevance. As a result, the

liberal agenda often prevails in NGOs actions. Liberal feminists advocate for gender equality through legal and political reforms within existing societal structures. They focus on securing women's rights through legislation, emphasizing individual freedoms, equal opportunities, and access to education and employment. Liberal feminists believe that the state plays a crucial role in protecting women's rights and promoting equality, often advocating for policies such as equal pay, reproductive rights, and protection against gender-based violence. Their approach is typically reformist, seeking gradual changes to achieve gender parity, while working within the framework of democratic institutions and laws. In Armenia, liberal feminists often lead initiatives that aim to influence policy changes, engage in advocacy campaigns, and work towards creating a more inclusive society for women.

In contrast, grassroots initiatives enjoy greater freedom and engage in more horizontal relationships, but they face challenges related to limited resources. There may be a perception that these initiatives are more radical, anarchistic, and less inclined to cooperate with others. Furthermore, it is often difficult to target or engage individual members of these initiatives. Radical and reformist groups rarely engage with each other or synchronize their actions, which significantly reduces the overall impact of the women's movement in Armenia.

Radical feminists argue that gender inequality is deeply embedded in societal structures, particularly in the patriarchal systems that they believe shape all aspects of social, political, and economic life. They assert that patriarchy, as a system of male dominance and control, perpetuates the subjugation and exploitation of women, and that true equality can only be achieved through a fundamental, transformative change in society. Unlike liberal feminists, who focus on reforming existing laws and policies, radical feminists advocate for the dismantling of traditional institutions such as marriage, the family, and capitalism, which they view as key enablers of women's oppression. They emphasize the importance of solidarity among women and often challenge cultural norms, seeking to reshape societal values around empowerment, autonomy, and collective action. In Armenia, radical feminists focus on confronting issues like gender-based violence, sexual exploitation, and societal expectations around women's roles, pushing for radical shifts in both societal attitudes and structural inequalities. Although their approach is more confrontational and less institutionalized than that of liberal feminists, radical feminists believe that only through this deep-rooted transformation can women achieve genuine liberation.

By increasing access to these networks and fostering cooperation between both reformist and radical agendas, the women's movement in Armenia has the potential to overcome its current fragmentation. This approach could lead to greater unity, improved impact, and a more powerful collective voice for women's rights in the country. It is crucial for the women's movement in Armenia to increase access to networks and foster cooperation between reformist and radical agendas because unity enhances the overall effectiveness of the movement. When these groups work together, they can leverage each other's strengths: reformist groups often have the institutional knowledge, connections, and resources to push for policy changes, while radical groups bring fresh perspectives, bold ideas, and a commitment to deeper societal transformation. This synergy creates a more diverse and powerful collective voice,

capable of addressing both immediate needs through reforms and long-term structural change (Tilly 2004). Additionally, a unified movement can break down the silos that currently hinder progress, making it easier to mobilize more individuals, attract greater public support, and influence policymakers. In a fragmented state, women's voices may be diluted or ignored, but by coming together, the movement can challenge entrenched patriarchal norms and push for comprehensive societal transformation (Rahm 2022). Ultimately, fostering cooperation allows the movement to be more resilient, adaptable, and impactful in advocating for women's rights in Armenia.

Three key factors have contributed to women's involvement in the women's movement in Armenia, as highlighted by women who were interviewed: education, volunteerism, and networks. Many members of women's movements are graduates of training programs organized by women's NGOs. Joining an NGOs is generally easier than becoming part of a radical group, as radical groups tend to be more closed off, making access difficult for outsiders. Women NGOs, on the other hand, provide a wealth of volunteer opportunities, creating an ideal space for young graduates to start their involvement. Through their volunteer work, they gain valuable experience and further education, strengthening both their personal development and the broader movement. By expanding access to these networks and focusing on building both reformist and radical agendas, the women's movement in Armenia can potentially achieve greater unity and impact, despite its current fragmentation. It is also interesting to note that it was via networks that women's movement brought people to the movement, some people, especially friends and close contacts decide to self-organize.

### **Protest cycles**

The identity-focused nature of new social movements does not easily translate to Armenia and other post-Soviet contexts that are notable for their different historical developments. Like some other historical aspects of the development of the South Caucasus region, the history of local social movements in this region differed from, for example, Europe. What was in fact a South Caucasus novelty in the 1990s was the massive emergence of NGOs. In the case of Armenia, these organizations emerged in response to new financial opportunities provided by international donors, to the coercive and paternalistic actions of states, and to a reality that the concept of new social movements fails to capture. Both the long history of identity-based organizations and the emergence of NGOs can be explained by the focus on political opportunities and the changing nature of protest.

The new social movements embrace a politics of everyday life that prioritises changes in lifestyles, values and the defence of civil society. The organisational consequence of these distinctive aims is an emphasis on informal grassroots networks, which in turn allows the new social movements to operate outside institutional channels, taking direct action on a limited range of issues and by creating cultural innovations that challenge the laws through which informal activity is structured (Blumer 1969; Tilly 1978). In this regard, trade unions are characterised as being limited to the old style of political affirmation. Their aims are couched in terms of political integration, economic rights for workers – the pursuit of full social and

economic citizenship – aims that may have a radical or reformist emphasis, but which are in any case silent on issues such as local autonomy and micropolitics. Their modes of organisation are instrumentally adapted to more abstract aims and therefore take on formal, hierarchical and bureaucratic dimensions. Conversely, their actions emphasise a narrowly defined political mobilisation, such as support for a social democratic party. Although new social movements are constituted as an analytical category, they are often conflated with trade unions. The emergence of societies as multiply intersecting and overlapping networks of power gives us the best available entry into the problem of what is ultimately primary or defining in society (Ziemer 2020; McAdam, Tarrow and Tilly 2001).

In the Third Republic of Armenia, the emergence of civil society began with the Karabakh movement in 1988. A number of Armenian scholars identify 3 main stages in the development of civil society (Gevorgyan 2023; Gevorgyan 2020; Aleksanyan 2020; Ishkhanian 2014), and E. J. Paturyan (2021) identifies the 4th stage.

The emergence and development of women's groups in Armenia, as part of the broader civil society, can be understood through several distinct phases, each reflecting shifts in both the social and political landscapes of the country (Ohanyan 2021). Over time, each generation of women's movements has built upon the achievements of the previous one, gradually expanding the scope of their activism and pushing for greater rights, recognition, and structural reforms (Al Jayousi and Nishide 2024).

The first generation of women's groups emerged in the late 1980s and early 1990s, primarily focusing on humanitarian concerns, especially in response to the devastation caused by the First Karabakh War (1988-1994). These groups played a vital role in assisting the war's victims, particularly displaced women and children, often collaborating closely with the state to establish essential services. Their efforts were mainly centered on immediate relief, such as providing shelter, food, medical care, and psychological support. However, during this phase, there was little focus on advocating for women's political rights or social change. Women's organizations were not yet working on gender equality or systemic issues, but were instead primarily concerned with addressing the basic, urgent needs of affected women in the context of war and displacement.

The second generation of women's groups emerged during a time of significant political transformation in Armenia, particularly after the adoption of the Armenian Constitution in 1995, the enactment of the Law on NGOs in 2001, and Armenia's membership in the Council of Europe. These political shifts created a more favorable environment for the growth of civil society, and many women's organizations began to take shape. These groups started to focus more on raising awareness of the gender-specific challenges faced by women in Armenia, such as domestic violence, limited political representation, and economic inequality. International donors started playing a key role during this phase, funding projects that addressed these issues and aligning with their priorities. The work of these organizations often included advocacy for legal reforms, awareness-raising campaigns, and efforts to hold the government accountable for its obligations under international human rights frameworks, such as the United Nations conventions on women's rights. Notably, these groups also began to use

international mechanisms like shadow reports to apply pressure on the Armenian government, urging it to fulfill its commitments to gender equality and women's rights.

The third phase of women's activism in Armenia coincided with the rise of civic activism in the mid-2000s, marking a departure from formal, donor-driven NGOs and agendas. During this period, several women's initiatives emerged that were more grassroots in nature, reflecting the broader trend of community-based activism. As described by A. Ishkhanian (2015), these new initiatives were distinct from formalized, professionalized NGOs in several ways, including the issues they addressed, their organizational structures, their methods of action, and their lack of engagement with foreign donors. The new focus was on local, community-driven issues and the desire for greater autonomy from foreign funding and external influence. One of the most significant milestones of this phase was the formation of the Coalition to Stop Domestic Violence Against Women in 2010. This coalition brought together various women's organizations and activists to address the pressing issue of domestic violence, which had long been neglected in Armenian society. The coalition worked to raise public awareness about gender-based violence and lobbied for legal reforms, pushing for the adoption of stronger laws and support systems for survivors of domestic violence.

The fourth phase, beginning with the Armenian Revolution of 2018, marked a significant shift in the political and social landscape of the country. The revolution, which was driven by widespread public dissatisfaction, brought about a wave of democratization and political openness. This political transformation created new opportunities for women's groups, as many activists and organizations became more actively engaged in shaping the country's post-revolutionary future. Women's issues became more prominent in the political discourse, and women's groups found new avenues to influence policy and engage in public debates about gender equality, social justice, and women's rights.

The major observable impact of women's groups in Armenia, particularly since the 2018 revolution, includes a significant shift in public attitudes toward gender issues. Women are now more aware of their rights and have better tools and resources to protect them, especially in areas like domestic violence. Legislative changes have also been made to improve women's rights, with reforms in laws addressing gender-based violence, workplace equality, and political representation. Women's rights have become an integral part of the broader political discourse in Armenia, reflecting a shift in how gender issues are perceived in society.

While these developments reflect substantial progress, challenges remain, particularly regarding the integration of women's issues into broader political and social agendas. The fragmentation of women's groups—due to differences in ideologies, approaches, and priorities—continues to pose a barrier to creating a unified, collective movement for gender equality in Armenia. Furthermore, women's organizations face ongoing struggles to maintain sustainability and independence, especially in light of the limited support from state institutions and the complexities of balancing grassroots activism with international funding priorities.

In summary, the evolution of women's groups in Armenia has a complex and evolving nature with each generation building on the efforts of the previous one. From

humanitarian aid in the early years to advocacy for legal reforms and broader societal change, women's groups in Armenia have played a pivotal role in advancing gender equality and women's rights. However, there remains work to be done in consolidating these efforts into a more unified, strategic movement that can achieve lasting change for women in Armenia.

### Contentious Repertoires

The fifth and final aspect of political processes theory is 'contention repertoires', which refers to the variety of methods and strategies used by social movements to advance their demands and make their claims visible to the public and the state. These repertoires typically include forms of protest such as strikes, public demonstrations, petitions, sit-ins, and civil disobedience, all of which serve as tools for mobilizing collective action. Over time, the methods used by movements evolve based on the political opportunities available, as well as the internal dynamics and external challenges they face. In the case of Armenia's women's movement, the trajectory of contention has been notably shaped by political shifts and the changing relationships between civil society and the state.

Before the 2018 revolution, Armenia's political environment was deeply authoritarian, with limited space for public dissent or opposition movements. In this context, many women's groups adopted radical and confrontational methods, such as large-scale street protests, strikes, and direct action, as the primary means of expressing their grievances and advocating for women's rights. These methods were largely a response to the entrenched political system, which was often hostile to civil society organizations and reluctant to address gender inequalities. The activism of women's groups during this period was driven by a sense of urgency and frustration, as well as a desire to draw attention to the systemic barriers facing women, including domestic violence, lack of political representation, and social discrimination (Gonçalves and Oliveira 2022). Their bold, direct actions were aimed at forcing the government and the public to acknowledge the importance of women's rights and the need for immediate change. Despite these efforts, however, women's groups often found themselves marginalized or repressed by the state, which sought to suppress dissent and maintain control over public discourse.

The 2018 Armenian Revolution, however, represented shift in the political landscape, creating new opportunities for women's groups and other civil society actors. The revolution was a non-violent movement that led to the resignation of long-standing political elites, including Prime Minister Serzh Sargsyan, and ushered in a more open political environment under the leadership of Nikol Pashinyan. With the revolution, the Armenian political system opened up, offering new space for civil society engagement and a greater willingness from the government to collaborate with advocacy organizations. This shift was significant for the women's movement, as many groups began to reconsider their approach to activism in the post-revolutionary context.

In the wake of the revolution, reformist women's groups adapted their contention repertoires. Rather than relying solely on direct confrontation with the state, these groups increasingly sought cooperation with the new government to influence policy

and promote legal reforms. They recognized that, with the shift in political power, there were now more opportunities to engage in dialogue with policymakers and advocate for the implementation of gender-sensitive laws and policies. For example, women's groups began participating in policy discussions, joining advisory bodies, and working alongside the government to shape national policies on issues such as domestic violence, women's political representation, and gender equality. This strategic shift reflects a broader trend in social movements worldwide, where activists move from a confrontational stance toward a more pragmatic, coalition-building approach, seeking to influence change from within existing political structures.

At the same time, not all women's groups in Armenia embraced this shift. Radical groups within the women's movement, who had used confrontational tactics in the past, have largely maintained their previous approaches, continuing to advocate for more forceful actions to challenge the state and demand immediate reform. These groups remain skeptical of working with the government, believing that it is incapable of enacting meaningful change. Their efforts remain largely outside the formal political system, and they continue to rely on protests and other direct actions as their primary means of expression. While these radical groups continue to fight for women's rights, their influence has diminished compared to the more mainstream reformist groups, largely due to their lack of engagement with the new political opportunities created by the revolution.

The potential for NGOs participation in government decision-making has increased significantly after the 2018 revolution. Public organizations and civil society representatives have been included in various monitoring and inter-agency groups, which have been established to implement state policies and oversee the government's progress in addressing gender equality. These groups offer NGOs a direct role in shaping national policy, providing a platform for advocacy organizations to make their voices heard and hold the government accountable. This expanded involvement reflects the growing recognition of the importance of civil society in strengthening democracy and ensuring that policymaking is inclusive of all sectors of society.

## Conclusion and discussion

When discussing the characteristics of the women's movement in Armenia, it is crucial to recognize that there is no unified or joint women's movement or a single shared agenda. Instead, there are multiple parallel processes at play, all of which focus on improving the position of women in Armenian society. These various women's groups are composed primarily of NGOs and non-formal civic groups, many of which have emerged as a result of education, volunteerism, and networking efforts. While these groups share a common concern for women's rights, their approaches differ widely, and there is no overarching structure or agenda guiding their work.

In terms of tactics and strategy, two main factions can be identified within the women's movement: radical groups and reformist groups. Radical groups are typically represented by non-formal civic groups, which are often grassroots and more confrontational in nature. These groups tend to operate outside formal structures, focusing on direct action, public protest, and challenging the state or societal norms.

They are more likely to reject collaboration with the government, viewing the system as inherently flawed and requiring systemic change.

On the other hand, the reformist groups, typically represented by established NGOs, have adopted a more cooperative approach, especially after the 2018 revolution. These groups are more inclined to work with the state, seeking to influence policy, advocate for legal reforms, and ensure that women's issues are addressed within the formal political process. Since the 2018 revolution, reformist groups have built a stronger partnership with the government, working to implement gender-sensitive policies, support the legal framework for women's rights, and ensure the inclusion of women in political and social spheres.

This shift in cooperation and partnership after the revolution has led to a significant transformation in the contentious repertoires of women's groups. Before 2018, women's groups primarily relied on confrontational tactics, as there were limited opportunities for engagement with the state. However, after the revolution, the opening of political space and the more inclusive environment allowed women's groups to pursue alternative, more cooperative strategies. This has resulted in a growing focus on collaboration and dialogue with the government, as well as active participation in policy discussions, reforms, and the creation of laws that address issues such as domestic violence, gender equality, and women's representation in politics.

The political opportunities created by the revolution have played a crucial role in shaping the direction of the women's movement in Armenia. By altering the political context, the revolution allowed women's groups to move beyond their previous strategies of protest and instead focus on influencing policy through formal channels. This shift in the political environment significantly impacted how women's groups framed their agendas and how they responded to the country's most pressing challenges. While the women's movement is still diverse and fragmented, the political openings provided by the revolution have altered the dynamics of activism, providing new opportunities for influence and reform. This evolution underscores the broader theory that political processes and opportunities are central to shaping the tactics, strategies, and success of social movements.

### **Supplementary material**

The supplementary material for this article can be found at

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The author affirms this research did not involve human subjects.

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**Abstract**

In this book, various authors comparatively analyze the controversial issues of peace education and religion from the point of view of pedagogy and politics. In this context, the authors note that the modern world is becoming increasingly open and at the same time increasingly complex, fragile, unstable and aggressive. Therefore, the need for humanity to protect itself and future generations from the cruelty and violence of those massive scales that have horrified: the most brutal wars, protracted armed conflicts; terrorism; daily encounters with various mental pathologies, disorders, antisocial behavior and dysfunctional relationships, prejudices and discrimination; mass cases of domestic violence, thereby requiring civilizational and democratic countries to seek mechanisms to reduce them. The authors in their research draw attention to the fact that peace education is an effective way to prevent and reduce all types of violence, from global threats to peace to everyday conflicts. It is built on the basis of key, comprehensive social and humanistic values. In this sense, the goal of modern peace education is the development of a culture of peace in all its manifestations, since the content of peace education includes a wide range of knowledge from concepts of peace to religious and environmental issues. This knowledge is included in the content of both individual peace education courses of different focus, and in various educational areas.

**Keywords:** peace education, nonviolent education, interreligious education, peacebuilding, sustainable development, participatory learning, peaceful societies, Christian-Islamic team teaching.

Peace education is one of the most frequently used in recent times and at the same time the least clear in its content. The quality of education in the modern world is complex

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and contradictory, since, on the one hand, education has become one of the important spheres of human activity. In terms of its scale, this sphere of human life is one of the largest and most ramified in the world economy. There is currently no other area of human activity that simultaneously involves such a number of people in its sphere. Just as it is difficult to find another such sphere of life of modern society, attention to which would grow so rapidly. On the other hand, the expansion of the education sphere and the change in its status are accompanied by an exacerbation of problems in it, which indicates a crisis in education (Aslan, French and Hermansen 2022). In recent decades, in the process of searching for ways to overcome the crisis in education, radical changes have occurred in this sphere, aimed at forming a new educational system.

The search for an answer to the challenges of the time is gradually turning peace education into a giant international laboratory, where optimal options for its organizational strategy and content are developed. Thus, the global education system acquires new elements of unity of goals and content of the national and regional systems functioning in it. The ongoing changes are inextricably linked with the processes developing in the social, political and economic life of various regions of the world, the world community as a whole (Schweitzer 2022).

The global and European educational space unites national educational systems of different types and levels, which are in constant interaction. In this sense, one of the defining moments of the modern educational environment is the interaction of many local educational environments, the mutual use of specific features of the innovative environments of one country in the educational space of other countries, which creates similar educational situations in many countries and contributes to the development of the education sector as a whole (Gearon 2022; Thomson 2022). The processes of globalization of economic life actively push education to a wider development of international relations, to the search for its global perspective. One of the manifestations of this is the ever-growing interest in the formation of an international education system, which should play a central role in the development of global construction. For only education can ensure the acquisition and effective application of new methodological techniques, skills and values necessary to live with dignity in a digital and rapidly changing world (Lavy 2022; Gill 2022).

According to the authors, modern peace education and religion are a key part of world education, a complex system in the process of formation, based on economic, cultural, ideological factors. The systemic characteristics of peace education are becoming increasingly diverse, since it itself is turning into an increasingly complex social institution capable of providing a diverse and continuously increasing set of educational services, allowing a person to study throughout his active life (Duderija 2022; McLaughlin 2022).

In this book, the peace education system is considered as the core of world education, the result of the interaction of regional and national education systems, as a result of which a single world educational space is formed. However, the analysis of known theoretical sources shows that the study of the world and European educational space from the point of view of the systemic approach to peace and religion is just beginning. The factors of the formation of a unified system of world education identified to date require further study in connection with the dynamic social and

economic development of the world community, the strengthening of global trends of democratization, humanization and digitalization, which significantly enhance the internal potential of global education (ter Avest 2022; Benjamin, Koirikivi, Gearon and Kuusisto 2022).

In modern pedagogical theory there are few works devoted to a comprehensive consideration of interreligious education and peace, in particular, from the point of view of a systems approach. In this regard, we believe it is relevant to study the following main dimensions of interreligious education and peace in this book: 1) defining the theoretical and scientific foundations for the formation of systemic ideas and principles of a systems approach in the scientific knowledge of interreligious education and peace; 2) identifying the prerequisites and factors of the systemic development of the world and European educational space; 3) classification of educational systems of developed countries, unstable countries (countries of neither war nor peace) and the largest regions of the world according to the level of their integration potential.

Interreligious education and peace is a complex system in the process of formation, based on economic, cultural, religious, ideological, value and many other factors. The system of interreligious education and peace is a single whole, and the interdependence of its elements is so significant, and the integration in the global and regional society is so deep that sometimes it is very difficult to identify specific causes of disruption of the normal functioning of the system. Therefore, it is advisable to carry out an assessment of interreligious education and peace as part of world education on the basis of a systems approach (Karagedik 2022; Mirbagheri 2022; Adwan 2022).

The pedagogy of peace includes new approaches to understanding world education as a complex self-developing system that meets the following systemic principles: the relationship of the system and the environment, the plurality of description, and structure (Giovanni Aguilar 2022; Demosthenous 2022). However, these are far from all the principles of system formation on which the formation of the world education system is based.

Interreligious education and peace is a complex system, the formation of which, according to the authors of the chapters of this book, is carried out on the basis of a number of general systemic principles: specification, community, difference, consistency, integrity, systemic and additive separability, information content (Yağdı 2022; Iliško 2022; Lähnemann 2022; Şen and Vefa Şaş. 2022). Each element of the system of interreligious education and peace is specified by a given value of comprehension of the goal of education, namely: education of an individual based on a combination of universal and national values, aware of his/her national identity, capable of perceiving the world in all its integrity and interconnectedness, understanding his/her personal responsibility for the fate of the entire world community, contributing to the general socio-economic progress and easing the pressure of global problems (Michitsch 2022; Koukounaras Liagkis 2022; Yaman 2022; Mishra 2022). For a separate element, the specification process consists in goal-setting and selection of the content of education at each of its stages (preschool institutions, comprehensive schools, universities, etc.). Globalization, the growing interconnectedness of the world community contribute to the development of the

process of internationalization of world education (Lim 2022; Rodríguez Mc Keon 2022; Abbas Jafri 2022; Akin Musa 2022). Specification of elements of the world education system (national educational systems) is manifested in the growing integration potential of various regional systems, which can be identified as a system-forming factor.

As a result of the development of integration processes in the field of education, national educational systems are specified by common properties that contribute to the achievement of the educational goals of the entire world community. Along with the assimilation of national spiritual values, interreligious education and peace aims to cultivate in the younger generation a sense of belonging to all of humanity. In addition, a common property of all elements of the interreligious education and peace system is the presence of educational and upbringing functions in each of them.

Elements with their own goals and ways of achieving them in different regions of the world, depending on historical development, the level of socio-economic, social and political development, as well as the geographical location of a given region, can act as initially specified parameters of the world education system. The end result is the creation of a unified system in which each element 'works' to achieve the goals of the entire system; it is necessary to take into account the continuity of elements horizontally and at hierarchical levels in each individual region. Acting as a systematizing factor, integration processes in various countries of the world promote the exchange of common properties of educational systems, as well as new ideas for achieving and, as a consequence, the formation of a holistic educational system in the world.

At different levels of education, there are qualitatively different educational institutions (preschools, institutions of additional education, universities, etc.). However, this difference contributes to the formation and preservation of the system, since the reason for their qualitative development is the correspondence to the age, individual characteristics of the subjects of education in one system, and there is continuity between educational institutions, the so-called 'step-by-step education of the individual'. In addition, the presence of a different historical past, geopolitical, social and economic status of educational systems in different regions of the world contributes to the exchange and enrichment of experience in terms of the development of education and upbringing of the young generation throughout the world. In the education system, this principle can be represented by management processes. In the world education system, management relationships can be represented by two types: multi-level (local, regional, global) and multidimensional (vertical - interaction of educational systems of developed and developing countries, horizontal - cooperation of equal elements of the system, for example, the educational system of developed countries).

The principle of integrity is manifested in the interaction of national educational systems of individual countries of the modern world, which causes the emergence of new qualities of the system, which can be called integrative. These qualities are new in relation to the system, since they are not inherent in the individual components that form the system. As a macrosystem, world education unites a large number of national educational systems that have many differences. On the other hand, along with the

determination of the integral system by its parts, the opposite also takes place, namely, that each part always expresses the properties of a specific whole. Such an interpretation of the mutual determination of the whole and the parts in the system is related to the interpretation belonging to Nagel, according to which the organizational set is characterized by a functional interrelation of its parts and, as a result, one can speak not so much about the conditioning of the whole by the properties of its parts, but, on the contrary, about the predominant conditioning of the part by the specific properties of the whole.

At the beginning of the 21<sup>st</sup> century, the goal of interreligious education and peace is to educate, on the basis of universal values, an individual who is aware not only of his or her national identity, but also perceives the world in all its integrity and interdependence, understands his or her personal responsibility for the fate of the entire world community, promotes general social and economic progress and alleviates the pressure of global problems (Aslan, French and Hermansen 2022; Schweitzer 2022.). All this is reflected in the goals and content of education of various regional educational systems, which together constitute the macrosystem and world education. According to a number of authors of various chapters of this book, interreligious education and peace is an integral system, since it meets the criterion of integrity: peace education will cease to be a system when it is decomposed by the system-forming factor and integration processes between the educational systems of different regions (Mishra 2022; Rodríguez Mc Keon 2022; Michitsch 2022; Giovanni Aguilar 2022). It is important in relation to educational systems that the educational system is a goal-oriented system, that is, a system with target functioning.

It is important to note that the system of interreligious education and peace is an artificial system created by man, and its system formation can be divided into two stages. The first stage, at which the conditions for the formation of the system are fully defined: specification of elements of the environment of world education; the presence of a common property of the specification of elements of the environment of world education - education; integrity (achieved as a result of the interaction of qualitatively different regional educational systems). The second stage is the implementation of ideas by specific actors of the formation of individual regional educational systems.

The implementation of this stage is carried out by another element of the system - national institutions that regulate integration processes in the field of education, accompanied by mutual rapprochement, complementarity and interdependence of national education systems, synchronization of their actions and the emergence of trends towards the formation of a single educational space, as the most effective form of implementing the tasks of education of the future.

The intermediate carrier of information is the description of world education as a system. Highlighting the named dimensions, it is also necessary to note the relationship between the system and the environment. The system of interreligious education and peace is interconnected and interacts with the economic, social and cultural environments, and there is a constant exchange between them. Based on the world-holistic approach in various chapters of this book, interreligious education and world national, regional education systems, divided by the system-forming factor, do not retain the properties of the educational system of the world educational space (Hassan

2022; Lavy 2022; Cole 2022; Adwan 2022). They can be divided on any other basis (for example, by quality, by levels or stages of education), while remaining elements of a large system. In this case, the principle of additive separability applies.

Interreligious education and peace is a third-level system in the hierarchy and is the main means of transmitting culture in the process of purposeful, organized influence on a person and at the same time one of its components. The structure of Interreligious education and peace consists in the possibility of describing the system through identifying the main elements of its structure, the features of their internal connections. In this case, it is necessary to consider various hierarchical levels, which in our case mean the social and cultural level (world civilization), the level of a social institution (the system of world education), the level of its structural units (regional educational systems, educational institutions, types and forms of education), the level of primary groups (teaching staff, school classes, student groups) and the level of individuals who can act as an active and passive actor in education.

Such consideration assumes reflection of the structure of education, but does not contain two important features: dynamism and inertia. The dynamism of the education system is determined by the need to resolve the contradiction, constantly supported by the growth of society's demands on the individual and, at the same time, opportunities for its development. The inertia of the system of interreligious education and the world is a complex dialectic of subject-object relations between the education system as a metasystem and one of its most important subsystems – 'students', which cannot be completely eliminated due to the integrity and relative independence of this system. When considering the phenomenon of education, attention is drawn to the openness of the education system, in which there is a continuous exchange of material people, information with the external environment, the role of which is played by the entire social system. This allows us to talk about a stationary maintained dynamic equilibrium of the education system, through which a stream of objects of influence (students) constantly flows, with relatively unchanged macrocharacteristics of the system. From the point of view of the systems approach, another principle of systemicity is the principle of historicity, continuity (connections of the past, present and future in the system).

Human society, having gone through historical stages of development of material production and labor, in which the development of the personality of direct producers of material goods was sacrificed for social progress, has come to a level at which the development of the personality of all members of society becomes economically necessary and possible, and production itself is a sphere of realization of the developing abilities of the individual (ter Avest 2022; Yağdı 2022; Aslan, French and Hermansen 2022). Education occupies a special place in the formation of these developing abilities. In interreligious education and peace, the human need for knowledge necessary for life in society is realized.

This book examines the subject under study in motion, development, since interreligious education and peace develops in the process of social and economic development of societies in different countries and regions, and therefore, from the point of view of political pedagogy, it can be considered as a subsystem of social production. Accordingly, interreligious education and peace can be defined as a

historically established process (and result) of acquiring systematized knowledge, skills and abilities within the framework of social production. At the same time, interreligious education and peace forms hierarchies of values in society, especially during transitional periods of its history. The research conducted in this book gives grounds to assert that a comparative study of interreligious education and peace is a complex, interconnected in its main elements, emerging system that is advisable to be carried out on the basis of a systems approach.

The formation of a unified system of interreligious education and peace occurs under the influence of a set of prerequisites of both external (integral) and internal, intra-systemic (educational proper) nature. Considering the multiplicity and diversity of prerequisites influencing the process of internationalization of world education, it can be argued that we are dealing with a qualitatively new stage of international cooperation in this area, characterized by the increasing pace and depth of interaction between national educational systems, the creation of real conditions for their active rapprochement and the gradual formation of a holistic world educational space. The internationalization of all aspects of life and the strengthening of the interdependence of countries and peoples are one of the leading trends in modern development. It is based on the peculiarities of modern integration processes, and accordingly, the prerequisites of an integral nature have a more powerful influence on the internationalization of education than the prerequisites of an intra-systemic nature.

In the new conditions of civiliarchic democracy, interreligious education and peace should become significantly more open to international relations. Isolated national systems are no longer able to meet the needs of the integrated economy in training personnel; they constrain the functioning of the emerging single labor market. It is advisable to create new organizational forms of combining science, education and production similar to technology parks and technopolises, which in the future will determine the development of global integration processes in education and science. The creation of a single educational space is dictated by the objective processes taking place in the world community, which imply the need to integrate all forces in the development of information, technological, economic and other spaces, which is becoming an important system-forming element of further progress. Thus, the intensive spread of telecommunications, the Internet and other means, phenomena, consolidating the reality of interaction in the field of education, is a characteristic feature of today and reflects clearly emerging trends and needs for the formation of large intellectual spaces, which is directly related to the development of the educational space. Educational boundaries are being eliminated all over the world, academic mobility of students and teachers is increasing, and the exchange of scientific information is expanding. This is another factor in the development of the global educational space. The evolution of modern educational systems today is a holistic process of continuous change and development of their constituent elements with a focus on integrating national systems into a single educational space. Taking into account modern trends in global social development, the interaction of such systems as the global economy, science and technology, the formation of a new person capable of living in a rapidly changing, increasingly interconnected world, growing global problems and crises, the creation of a new paradigm of education is becoming an additional factor in its

internationalization. The search for an answer to the challenge of the time is gradually turning global education into a giant international laboratory, where optimal directions for its organizational strategy and content are developed. Consolidation of the global educational space can successfully develop only in the presence of a favorable international and legal environment. Its creation is ensured by parallel processes: the development of international legal acts of a global nature by relevant organizations and institutions, the development and adjustment of national legislation in the field of education so as not to create legal barriers or legal discrimination in international educational cooperation. The organization empowered to develop international legal acts of a global and regional nature in the field of education, science, culture and information is UNESCO. According to the scope of their coverage, UNESCO normative documents in the field of education are divided into regional and global, the effect of which affects the functioning of educational systems in the world as a whole.

### **Supplementary material**

The supplementary material for this article can be found at

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### **Conflict of interests**

The author declares no ethical issues or conflicts of interest in this research.

### **Ethical standards**

The author affirms this research did not involve human subjects.

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**HUMAN SECURITY IN ASIA: INTERROGATING STATE, SOCIETY, AND POLICY, EDITED BY DEBASISH NANDY, AND DEBTANU MAJEE. PALGRAVE MACMILLAN, SINGAPORE, 2024. XXI, 346 PP. <https://doi.org/10.1007/978-981-99-3585-7>.**

REVIEW BY:

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**Abstract**

This book comparatively analyzes the relationship between human security and national security from the theoretical perspective of the transition from traditional security to human security. The different chapters of this book analyze the structured and organized dimensions of human security that shed light on the economic, food, health, community, environment and political security conditions in Asian countries. The authors explore the theoretical foundations and various models of human security to understand the challenges threatening human security of Asian countries. This book also analyzes the different situations of Asian countries where economically vulnerable and politically unstable and sometimes broken political systems are unable to easily address the problems of hunger, poverty, illiteracy, militancy, terrorism and ethno-religious conflicts that pose a real threat to human security. The book discusses the challenges of health policies in Asian countries in the wake of the COVID-19 pandemic, which has led to a major humanitarian crisis, taking into account the limited role of Asian countries in combating COVID-19. It is important to note that this book develops an interdisciplinary discourse on human security among scholars not only in Asian countries but also throughout the world.

**Keywords:** United Nations, globalization, human security, human insecurity, COVID-19 pandemic, traditional security, economic security, environmental security, political security, armed conflict, corruption, war, terrorism, failed state.

In the modern knowledge society, there is an increased interest in the issues of human, national and public security. Its various aspects are studied, new concepts of human security are developed. A notable feature of modern approaches is: firstly, in giving priority to human interests when considering the problem of security, and secondly, in

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a qualitatively new level of development of research methods (Nandy and Majee 2024).

The relevance of this book is due to the theoretical and practical significance of issues related to the formation of effective legal mechanisms for consolidating the efforts of public authorities of Asian countries, international organizations and citizens of Asian countries in the field of ensuring national and human security (Majee 2024; Pandit 2024).

Human security in Asia has turned out to be one of the most important problems, which is now being dealt with in practical terms by a significant part of humanity, since the aggravation of conflict and crisis situations and global problems threatens, according to the authors of the chapters of this book, planetary catastrophes (Biswas and Murai 2024; Barbieri and Aleksanyan 2024). One of the most serious problems affecting human security in Asia is the environmental problem, which at the end of the last century took a priority position in relation to the totality of other global problems in terms of scale and speed of generation of negative consequences. Another equally important problem for humanity is terrorism. At the turn of the third millennium, the world is closely confronted with an unprecedented rampage of terrorism, which has acquired global proportions, threatening the security of entire nations (). Moreover, if in the past, the victims of terrorist acts, as a rule, were mainly political figures, today, the terrorists mainly target civilians.

The problem of ensuring security, improving and applying this institution in practice is becoming central in Asia as well. In various chapters of this book, the goal and objectives of solving this problem are closely related to the implementation of the concept of national security in Japan, Afghanistan, Vietnam, Pakistan, Bangladesh, Myanmar, Nepal, East Timor and Papua New Guinea, which is characterized by the organization of protection of the vital interests of the individual, society and the state from internal and external threats (Akon 2024; Nguyen and Le 2024; Benkin 2024; Datta 2024; Mohapatra 2024; Chattopadhyay 2024; Nandy 2024; Devkota and Bagale 2024; Arshed 2024). In this system of national security objects, the individual is dominant, in connection with which the main attention is currently paid not only to protecting his rights, freedoms and interests protected by law, but also to ensuring the personal safety of citizens.

The coverage of security issues in various chapters of this book reflects the Asian specificity of society development. Traditional underestimation of a person and disregard for the value of human life, which, unfortunately, are still inherent in Asian societies, predetermine the discussion of the topic of security, first of all, from the point of view of national/state security (Naha 2024; Rabbani and Panday 2024; Pandit 2024). The problems of personal security are considered in the framework of social security, and social security itself does not always find a worthy place in the complex of national security problems. Some authors of chapters of this book reduce it to economic security, to the provision of income sufficient to meet the urgent needs of a person. However, the realities of today increasingly urgently require the development of public security issues as one of the dimensions of human security. The most important aspect of the quality of life is the freedom and security of a person from various dangers and threats, the degree of his vulnerability to modern risks (Barbieri and Aleksanyan 2024).

The concept of human development defines personal security as the ability to use the right to choose in conditions of freedom and security, as well as complete confidence that these opportunities will remain tomorrow. Specific difficulties of administrative and legal research of security problems in the aspect of public provision of the right of the individual to security are connected first of all with the fact that security in Asia, as one of the main social and legal dimensions, has not yet received legal status. Except Japan, other Asian countries do not mention the right to security of the individual in legislative acts devoted to human rights (Akon 2024.). It seems that the only reason for this situation is that until now the need to protect this right has not been as obvious as at the present stage of development of human civilization. After all, security is a necessary condition for the implementation of all known human rights proclaimed in documents of international law and national constitutions. Without reliable protection of the person himself, his current and future existence and development opportunities, the protection of basic humanitarian rights loses its meaning. This provision, which until now seemed self-evident, in modern conditions requires special legislative consolidation and legal protection. This problem is quite complex and multifaceted. Although this book examines individual dimensions of the right to security, no comprehensive administrative and legal study of the mechanism for public and legal provision of this right has been conducted (Nandy and Majee 2024).

The fundamental rights and freedoms of citizens enshrined in the constitutions of Asian countries will have an effective meaning only if public and administrative structures exercise their powers to observe and protect the rights and duties of citizens. One of the most important places in this process is given to the improvement of administrative and legal regulation of public relations, which is closely connected with the protection and defense of human and civil rights as the main supreme value of democratic and ciliarchic societies. In the administrative and legal dimension, this direction should be manifested in strengthening the administrative and legal status of a person and citizen. However, at present there are omissions and abuses in the sphere of legal provision of citizen security, which oblige society to develop measures to organize counteraction to them, but until the social and humanitarian sciences have responded to them properly, dangerous deviations take root, threatening the interests of citizens.

The right to personal security is connected with the task of protecting the law from arbitrariness, and therefore meets the interests of each individual citizen and public and legal interests. It is necessary to comprehensively study this right in Asian countries, taking into account the content, conditions of implementation, possibilities of ensuring guarantees of implementation, the position in the system of fundamental rights and freedoms and a number of other issues. These circumstances determine the relevance and practical significance of this book, determine the need to study the essence of the right to security and the conditions for its implementation at the current stage of development of the statehood of Asian countries.

The need for personal security is one of the basic motivational sources of human activity, and social organization is a way to ensure normal living conditions, a means of jointly counteracting natural and social threats. Cooperation of efforts of participants

in social relations subordinated to a single public will allows for counteracting threats that cannot be countered individually. At the same time, the strengthening of people's dominance over nature is accompanied by a deepening differentiation of the threat factor to humanity, an increase in the scale of threats, and an increase in the degree of their danger. As social relations become more complex, the range of social threats expands, and the modification of the threat factor, in turn, reflects the process of social development. The complex interdependence of the threat factor and the state of development of the social system objectively entails the isolation, specialization, and complication of social means of ensuring security, which are an integral attribute of organized social systems.

In the conditions of political and legal organization, the system of ensuring human security of Asian countries takes a specific form, but does not change in its essence. Public power, its institutions and bodies become the most effective means of counteracting internal and external threats of social, natural, man-made nature. In connection with constant changes in the internal and external environment, the state and society have always tried to develop effective means of protection against relevant threats. This problem is especially relevant in the context of global general civilizational changes.

Global changes occurring in the modern world along with positive phenomena entail the emergence of new threats and increase the impact of threats that existed before, the nature and degree of danger of man-made threats are changing (Pandit 2024; Rabbani and Panday 2024). In these conditions, the public authorities of Asian countries are becoming the main actor in ensuring human security, a special role is given to state means of counteracting threats of different nature and degree of danger. The transition to a qualitatively new public policy predetermines the need for appropriate changes in the legal form. That is why the legal dimension of improving the public mechanism for ensuring human and national security has not only theoretical significance, but also a very significant practical significance in the context of the general issue of legal reform of the national security system of Asian countries.

### **Supplementary material**

The supplementary material for this article can be found at

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### **Conflict of interests**

The author declares no ethical issues or conflicts of interest in this research.

### **Ethical standards**

The author affirms this research did not involve human subjects.

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**EVALUATING NATO ENLARGEMENT: FROM COLD WAR VICTORY TO THE RUSSIA-UKRAINE WAR, EDITED BY JAMES GOLDGEIER, AND JOSHUA R. ITZKOWITZ SHIFRINSON. PALGRAVE MACMILLAN, CHAM, 2023. XVII, 645 PP. <https://doi.org/10.1007/978-3-031-23364-7>.**

REVIEW BY:

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**Abstract**

This book examines the main stages and authoritarian obstacles of NATO enlargement in Central and Eastern Europe after the Cold War, which gradually transformed into a hybrid conflict. In the various chapters of this book, the authors compare the main advantages and disadvantages of NATO enlargement in terms of the results of defending democratization in Central and Eastern Europe. The authors analyze the relationship between NATO enlargement and U.S. foreign policy on democracy and security in Central and Eastern Europe, which are indicators of NATO's resilience as a political and military intergovernmental organization. The book analyzes the challenges of democratizing political regimes from the perspective of political security, including the full-scale Russian-Ukrainian war of 2022.

**Keywords:** NATO Enlargement, Ukraine, Russia-Ukraine War, Political Alliance, US Foreign Policy, US-Russian Relations.

In the current conditions of the duration and full-scale war of Russia against Ukraine since February 24, 2022, the mechanism of European integration of the EaP countries (Ukraine, Moldova, Georgia, Armenia), as well as their future tasks of membership of these countries in the EU, is changing completely (Krayevska 2020; Czepil, Krayevska

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and Andeva 2024), since a new 'hot war' and the risk of a nuclear war due to Ukraine require strategic decisions from NATO and the U.S. (Goldgeier and Shifrinson 2023).

After the end of the Cold War, in the context of new challenges to the world order, NATO's tasks also changed in order to protect 'old' and new democracies in the global security architecture of the new era. The transformation of NATO was a logical consequence of the broader process of the formation of a new world order after the end of the Cold War, which is also characterized as the transformation of NATO to mark the end of the bipolar confrontation and the victory in this confrontation (Goldgeier and Shifrinson 2023).

NATO enlargement was caused by the collapse of the USSR and the democratization of post-communist and post-Soviet countries, as the new political leadership of these countries had a chance to become part of Western democracies, strengthening their security and stability in the transformation of the political system (Sayle 2023). The profound and qualitative change in these countries emphasized the fact that we are talking about a change in the basic characteristics of international cooperation within and around NATO, that is, the goals, principles and logic of interaction between these countries.

The vectors and policies of NATO transformation, pursued by the leadership of Western democracies, are an integral component of the leadership of the U.S. global strategy, aimed at maintaining joint consolidation by strengthening those international institutions in which the U.S. plays a leading role (Shifrinson 2023). Of particular note in the context of this book are the concepts of transformation supported by the American leadership in doctrinal documents, speeches, and legislative texts, as they formed the basis of the American policy of NATO transformation (Menon and Ruger 2023). Of interest were also the alternative concepts proposed by American think tanks and leading experts, as their ideas eventually became official, were used to support the political leadership of new democracies and identify their capabilities for implementing certain projects (Colbourn 2023).

In various chapters of this book, special attention is paid to the fact that with the beginning of a full-scale military invasion of Russia into Ukraine, the traditional and established security system in the sphere of international relations at the present stage is undergoing significant changes (Marten 2023). After the end of the Cold War, new challenges and threats arise, and there is a need to identify new approaches to respond to them. Institutions and organizations that were established long before the end of the bloc confrontation are faced with the need to adapt to new realities. Unlike the Warsaw Pact, NATO did not end its activities, but on the contrary, with all consistency approached the issue of ensuring the protection of its borders, as well as the allied countries. As a priority for NATO development, the strategy of expansion to the east was chosen, which required the preparation of Eastern European states and familiarization of their governments with the democratization of political regimes (Lanoszka 2023).

In the post-Soviet region, the processes of state-building and nation-building are still ongoing, which have an ambiguous impact on the development prospects of the newly formed individual countries. The process of NATO expansion directly restrains

Russia, which, from the point of view of the Russian political elite, is a challenge to Russia's national security in the Eurasian and Euro-Atlantic space.

In this book, NATO policy in the post-Soviet space examines the conflict situations of Georgia and Ukraine, since they are on the agenda of the Russian-American confrontation. The problematic nature of these countries has resulted in the escalation of internal contradictions, which have involved the countries of Central and Eastern Europe. This confirms the fact of military and political confrontation, which has been going on for decades, and NATO enlargement, of course, affects the interests of all post-Soviet countries (Sushentsov and Wohlforth 2023; Zubok 2023; Moore 2023).

The relevance of the research of this book is associated with the following factors:

- Firstly, the U.S. plays a leading role in modern world political processes. This is achieved to a large extent due to the rational use and gradual transformation of the system of international institutions created by them after the Second World War. The future configuration of the international system depends on the success of the transformation policy pursued by the United States in relation to key international institutions.
- Secondly, the American policy of NATO transformation is a logical continuation and an integral element of the global strategy of the United States. A comprehensive analysis of the main concepts of the transformation of the North Atlantic Alliance contributes to the understanding of the main components of the U.S. global strategy at the present stage.
- Thirdly, NATO's transformation has a significant impact on the European security architecture. The study of this process is of particular importance in the context of Russia's foreign policy aimed at strengthening its position in the security sphere in Eurasia.
- Fourthly, NATO activities enjoy the support of a significant part of the countries of North America and Europe, which testifies to the popularity and high role of NATO in the context of transatlantic relations. One can speak of interest in the activities of the organization in remote regions of the world. For example, Georgia, Moldova and Ukraine have declared their intention to develop cooperation with NATO and strive for membership in it, and other countries of the post-Soviet space participate in various NATO projects and missions.
- Fifth, at the present stage, there is a revival of U.S. interest in strengthening transatlantic ties, expressed in the initiative presented in 2013 by U.S. President Barack Obama to create an 'economic NATO', that is, a Transatlantic partnership in the sphere of trade and investment.
- Sixth, despite the complexity of the issues surrounding the relationship between Russia and NATO, there is potential for both cooperation and conflict. In the current circumstances, it is especially valuable to gain comprehensive knowledge about the nature and direction of the transformation processes that have affected NATO since the end of the Cold War, as well as the role of the United States in these processes.
- Seventh, an analysis of the American experience in implementing policies aimed at transforming NATO is of practical use to the leadership of all countries in the

world, which is faced with the task of activating the activities of their countries to strengthen their own national security.

The various chapters of this book examine the main concepts of NATO transformation and their implementation in U.S. foreign policy (Poast and Chinchilla 2023). Based on the purpose of the study, the authors set the following tasks: 1) Characterized the main approaches to the study of the policy of countries on the transformation of international institutions in the security sphere in order to determine the optimal approach and tools in the context of this study; 2) identified the general features of American policy towards NATO, which determined the formation of the main concepts of NATO transformation; 3) Classified American concepts of NATO transformation, tracing the evolution and comparing the content of these concepts with the content of the main NATO documents, identifying those provisions that were implemented in the policy of NATO enlargement; 4) Using comparisons, the main similarities and differences in the policies of different U.S. presidential administrations aimed at transforming NATO were identified.

NATO, within the framework of various chapters of this book, was considered as an organization created on the basis of an alliance treaty stipulating the joint reflection of a threat to the inviolability of borders and territorial integrity of one of the member states, individual and collective build-up of military potential by the participants, as well as holding consultations in the event of a threat against one of the states that signed the pact (van Hooft 2023). All this allows us to define NATO as a military and political alliance in the broad sense, aimed at mutual military assistance. The theory of alliances that developed during the Cold War had significant explanatory power in the process of interpreting the origins of the formation and principles of functioning of NATO during the period of broad confrontation (Moore 2023). In this regard, it seemed appropriate to consider alliances as a function of the balance of power.

The introduction of the concept of the balance of threats into the theory of alliances was a significant achievement that made it possible to take into account the role of various factors in the formation of allied strategies of states (Townsend 2023; Moller 2023). The end of the Cold War is considered as an event that identified a number of shortcomings of the theory of alliances. Firstly, the theory of alliances, formed within the framework of the realist paradigm, considered the functioning of alliances exclusively as a consequence of the policy of the state with the greatest national power, paying little attention to the problem of interaction of states within alliances. Secondly, in the traditional sense, the theory of alliances was based on the concept of national interest, understood in terms of forces. Thus, the analysis of the intrastate struggle on issues of determining threats to national security required borrowing a pluralistic model developed within the framework of the liberal paradigm. Thirdly, the theory of alliances could not offer an exhaustive explanation for the phenomenon of the preservation and strengthening of NATO against the background of the disappearance of the main enemy and the threat to the security of the majority of member countries.

The North Atlantic Treaty Organization was also considered as an example of an exclusive specialized international institution in the field of security. The use of a neo-institutional approach made it possible to reveal the importance of preserving and further transforming NATO for all participants of this institution as a way to reduce

transaction costs in the process of international cooperation, redirecting established practices of interaction to solving new problems in the field of ensuring security (von Hlatky and Fortmann 2023). The use of an intergovernmental approach, which views the transformation of an international institution as a series of agreements between its main participants, sovereign states, allows us to take into account the increased role of U.S. allies in the process of reforming the main international institutions after the end of the Cold War. However, the decisive role in the transformation process was assigned to actors who had the greatest traditional factors of national power and the ability to influence the agenda of international cooperation, who were able to offer developed ideas and concepts ahead of their partners.

In the context of modern hybrid wars, NATO is on the way to becoming a global international organization capable of confronting the challenges of international security of the 21<sup>st</sup> century. Modern terrorist organizations, hybrid wars, the Second Karabakh full-scale war of Azerbaijan against Armenia and the war of Russia against Ukraine have significantly influenced NATO's strategic thinking from a political point of view, deciding that NATO should be ready to prevent, protect against terrorist attacks directed from abroad, where necessary. This means that NATO should help national authorities cope with the consequences of terrorist attacks. NATO should provide its assets and all possible means in order to support operations, including against terrorism, carried out in cooperation with the EU and other international organizations and coalitions.

In the book, the authors note that from a military point of view, NATO has a military concept of defense against terrorism, within the framework of which the military authorities of NATO are developing a separate concept of special operations taking into account the military power of Russia and China. Obviously, these measures not only justify the main goal of NATO, but once again confirm the global nature of its activities.

The effectiveness of the new concepts of humanitarian intervention and limited sovereignty is beyond doubt. In the case of NATO's territorial interregional expansion, the Alliance's influence on international relations as a whole is intended to complement the role of the UN, OSCE, Council of Europe and the EU. All fundamental decisions will then be made within the framework of a renewed and expanded NATO. If the Euro-Atlantic partnership should be rethought and adapted to new realities, then European integration is the optimal means of ensuring maximum stability and security for Europe. It provides certain conditions for security and stability, as well as renewed strategic relations with Russia and China.

### **Supplementary material**

The supplementary material for this article can be found at  
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### **Conflict of interests**

The authors declare no ethical issues or conflicts of interest in this research.

### Ethical standards

The authors affirm this research did not involve human subjects.

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