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Journal of Political Science: Bulletin of Yerevan University

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In this Issue

In the context of confrontation and military conflict, political transformations occurring in various spheres of public life, processes reshaping these spheres in most Eastern Partnership countries and elsewhere, are taking shape within a global restructuring of global society. These transformations are impossible without the active intervention of the state, local governments, and other actors within the political system, and therefore without the formation of a specific set of means, methods, and new instruments for political governance in developed and underdeveloped societies.

Contemporary social realities require a thorough understanding of the resilience of political development in the context of transitivity, which prompts an examination of the existing dynamic imbalance of political exchanges and the asymmetry of political relations in communicative discourse through the prism of asymmetry and symmetry, stability, and sustainability. New demands for changes in the quality of public administration highlight the challenges of studying the nature of interactions between government structures, civil society organizations, the media, and communications. Sustainable political development and the increased social effectiveness of governing institutions necessitate an integrative approach to the legitimization of political change, allowing for the elimination of meaningful sociocultural gaps in the political space.

The key characteristics and development trends of the political system in modern global and regional societies reflect the specific nature of transformation processes, representing a complex set of qualitative changes in the structure, functioning, and interactions of the political system with the geopolitical and geoeconomic environment. Political institutions and dominant value orientations simultaneously act as both a condition of existence and a result of functioning in relation to each other. During the process of political transformation, global and regional societies have encountered a number of problems characteristic of countries in transition (high social costs of reform, oligarchic ownership, widespread corruption, and instability of democratic institutions). The transformation of the political systems of the Eastern Partnership countries took place in challenging social and cultural conditions, as traditional components of the value system, established types of political consciousness, and dominant strategies of political behavior to some extent hindered the adoption of democratic norms and the entrenchment of democratic institutions. Therefore, democratic transformations in many countries have been accompanied by a delegitimization of political innovations based on values.

In 'Measuring the Political System Stability of Armenia and Israel from 2008 to 2023: A Comparative Analysis Using the SIPS Model', Armen Mirzoyan analyzes the key political, social, and economic factors influencing the stability and instability of the political systems of Armenia and Israel. The influence of various factors in the context of challenges to the political systems of Armenia and Israel, integration, transparency, cross-border development, and the formation of economic and information spaces are so numerous and intense that it is difficult to quickly and accurately assess the extent of their destabilizing potential and make appropriate, timely decisions. In some cases, external actors outperform influencing factors in the speed and accuracy of decisions and actions. The recurrence and effectiveness of

destabilizing technologies in modern challenges, political upheavals, civil unrest, conflicts, and wars demonstrate the difficulty of developing effective technologies and template solutions for ensuring political stability in small states such as Armenia and Israel. The urgency of searching for technologies to ensure political stability in Armenia and Israel is confirmed by current political processes and attempts at external destabilization, as the Middle East and South Caucasus have been and remain territories of geopolitical competition, a struggle for military-political and geo-economic influence in these regions. Therefore, the issue of ensuring political stability in Armenia and Israel becomes a matter of strategic stability. Moreover, complex regional relations with neighboring countries are fraught with deep contradictions and divisions, which unfriendly countries or terrorist organizations attempt to exploit to wage proxy wars and destabilize the situation. In such circumstances, effective technologies are needed to ensure the stability of the political system and build social immunity in Armenian and Israeli societies against external destabilizing factors.

In her article 'The difficult path of parliamentarism in Armenia's democratic transition: how does the separation of powers affect political responsibility in an unconsolidated society?', Khosrovadukht Azatyan analyzes the role of parliamentarism and constitutional reforms in addressing identified shortcomings in the state-building system and enhancing the effectiveness of public authority in Armenia. In particular, to consistently implement the principle of separation and balance of powers, it is necessary to develop a parliamentary form of government, a multi-party system, dialogue between the ruling and opposition parties, and civil society organizations in Armenia. The author believes it is important to subject the essence of the principle of separation and balance of powers to political and legal analysis, as well as to propose new solutions for improving the mechanism for implementing this principle at the current stage of building Armenian parliamentarism in the context of constitutional reforms. The principle of separation and balance of powers in the system of building a parliamentary form of government in Armenia was legally enshrined in constitutional and legal documents, but its political significance and meaning were not fully understood in political consciousness and civic culture.

In 'A Rational-Functionalist Approach to Analyzing Cooperation within the BRICS Framework: multipolarity of international relations and assessment of its possibilities', Franck Jiresert Techa Djoumessi analyzes the specifics of interstate cooperation within BRICS, taking into account that the transregional partnership among countries is based on the principles of equality and mutual respect and aims to intensively develop multilateral economic, political, social, and cultural cooperation. Furthermore, the BRICS transregional partnership offers the gradual development of an alternative to the current global governance system. In the political sphere, this entails jointly countering the international terrorist threat and resolving local and regional conflicts exclusively through peaceful means. In the economic sphere, the BRICS transregional community supports infrastructure projects in developing countries participating in the transregional partnership. The BRICS transregional partnership is based on the deep-seated national political and economic interests of its member states, far removed from short-term market considerations, making the BRICS factor a significant phenomenon in the global community. Through the multifaceted interaction

of its member countries, the BRICS transregional partnership strengthens their positions in the global political and economic arena through the creation of synergies. This study provides an opportunity to comprehensively examine the activities of the BRICS transregional partnership within the current system of global governance and analyze the potential for cooperation among BRICS member countries in reforming the architecture of the current global governance system. The relevance of this study is also determined by the existence of contradictions, as the BRICS transregional association is characterized by weak structure and the presence of contradictions between member countries. A detailed, specific strategy for the future activities of the BRICS transregional community has not yet been developed, nor have effective mechanisms been developed for implementing decisions made at BRICS summits.

In the article 'The Political Hybridization of Middle Eastern States: Iraq as a Case Study', Kardo Rached and Jalal Mistaffa discuss the current development of Iraq's political system in the context of Middle Eastern transformation processes. The problem of Iraq's political hybridization and the search for a model of state structure adequate to the changing geopolitical configuration persists. This search, its dynamics, results, political structure, etc., are linked to the formation of a new political elite. In the Middle East regional dimensions of modernity, the problem of the hybrid political regime and public authority in Iraq, the ruling elite, its nature, social and religious character, effectiveness and legitimacy has come to the fore. The example of Iraq is illustrative and particularly interesting because the formation of a new elite occurred against the backdrop of political and sectarian conflict, under American occupation, and later, amidst confrontation and the fight against terrorist groups. Furthermore, the emergence of a new Iraqi state and a new elite in Iraqi society occurred simultaneously with regional transformation processes characterized by global and regional confrontation between various centers of power, which, in turn, impacted Iraq's domestic political processes. The 2003 invasion of Iraq by US-led coalition forces led to the formation of a new administration. Despite the proclamation of democratic principles, ethno-religious and social challenges nevertheless shaped Iraq's future. The challenges of transitioning from an authoritarian form of governance to the proclaimed democratic principles of forming a hybrid regime, influenced by the ethno-religious composition of the Iraqi population, were revealed. The policies of the new political elite played a particularly important role in the hybridization of the political regime in post-Saddam Iraqi state-building, which is analyzed in this article.

In the article 'Homeland, belonging, and return: push-pull factors of Armenian repatriation during the Russia-Ukraine conflict', Nvard Melkonyan and Yuliana Melkumyan discuss push-pull factors and the specifics of Armenian repatriation in the context of post-Soviet conflict transformations and Russia's full-scale war against Ukraine since 2022. It is precisely in this context of a reconsideration of the value of interethnic relations that the differentiation and integration of communities, the increased migration and immigration of Armenians of all ages, affect psychological, social, economic, and other aspects of life. In this sense, homeland, belonging, and repatriation of Armenians have become processes of adaptation and resocialization that have new implications for human security and are therefore examined in this article across various dimensions of push-pull factors. Among the areas in which this issue is

being addressed, the study of the socialization and adaptation of people in a new socio-cultural environment, and the conditions for developing their readiness for responsible life management, is currently gaining particular significance. It is precisely in the area of the psychological characteristics of repatriates' assimilation into a new socio-cultural environment that the psychological and sociological study of intergenerational interactions is particularly relevant. It is noteworthy that the article analyzes the characteristic features of Armenian repatriates' attitudes toward their evolving life situation and the people around them at different stages of adaptation and maturation, subject to varying external and internal determinacy. These differences are determined by how they transform national identity and personal conformity during the stages of assimilating a new socio-cultural environment and its emotional acceptance. The solution to this problem lies in finding ways and means of organizing psychological and pedagogical support for the adaptation of generational strata within the socio-cultural environment of Armenian society.

In the article 'Legitimacy beyond performance: trust, accountability, and executive authority in transitional regimes', Marina Margaryan analyzes various dimensions of legitimacy in transitional countries, demonstrating how trust, accountability, and executive power influence the effectiveness and quality of governance. The author draws attention to how and in what ways the effective organization of social and political life determines the unique relationship between those who govern and those who are governed. The diversity of executive power forms in the transitional regimes of post-Soviet countries determines specific types of organization and functioning of public authority, the distribution of powers among state bodies, the use of electoral procedures inherent to these cultural types, and so on. In modern political discourse, the rules and procedures necessary for effective governance are inextricably linked to the concept of legitimacy. Moreover, Western political theory defines legitimacy as the primary criterion for democratic governance and the rule of law, through the prism of which the structure and operation of various mechanisms of interaction between society and the state are assessed. However, in the transitional regimes of post-Soviet countries that consider themselves transitional democracies, society views politicians, political parties, and political institutions with a considerable degree of mistrust. The author examines the case of Armenia as an example. With the advent of a democratic government, support and approval were expected from Armenian society. However, following the Velvet Revolution of 2018, citizens and CSOs began to demand greater support from the executive branch and parliament, viewing representative democracy, especially the mechanisms for its implementation, with doubt.

In the article 'New political growth points for strategic cooperation between Russia and Iran: sharing experience or strengthening trust?', Garik Keryan and Svetlana Jilavyan discuss the historical and contemporary characteristics of relations between Russia and Iran, taking into account the dynamics at the bilateral, regional, and extra-regional levels. Geopolitical factors and the potential for developing economic, political, cultural, and military relations provide fertile ground for Russian-Iranian cooperation in various areas. Advocating for each other's interests is a prerequisite for their significant influence on security in various regions, potentially even shifting the balance of power. Changes in the foreign policy strategies of the Islamic Republic of

Iran and the Russian Federation have led to a shift toward realism, aligning the two countries' views on cooperation and providing greater opportunities for developing bilateral relations. According to the authors, common points of contact that could serve as the basis for developing bilateral relations include: the transition to a multipolar world, an emphasis on non-Western centers of power, and the priority of developing bilateral, multilateral, and regional relations with a particular emphasis on shared interests and threats. In this sense, military-technical cooperation between Russia and Iran is developing dynamically and has achieved certain mutually positive results, overcoming previously inhibiting factors. Joint interventions in the Syrian and Afghan crises, along with strengthened cooperation in recent years, have elevated Russian-Iranian military relations to a new level, encompassing not only the traditional sale and purchase of arms but also joint military operations.

In her article 'U.S.-Iran Hostility and the Pursuit of Nuclear Technology Development in the Context of the Global Energy Transition: An Integrative Analysis', Rotimi Adeforiti analyzes the main factors driving the strategic conflict between the U.S. and Iran over the Iranian nuclear program, which remains unresolved and represents a serious confrontation and challenge to the international non-proliferation regime. Iran's potential emergence as a nuclear power is not only the cause of hostile relations between the U.S. and Iran, but will also, from time to time, trigger a crisis in the long-tested but still functioning nuclear non-proliferation regime. At the same time, many positions regarding the formation of a new security architecture in the context of Iran's nuclear program remain controversial, mutually exclusive, and therefore underdeveloped. In this article, the issue of Iran's nuclear program is somewhat politicized; approaches to it do not correspond to modern realities and require improvement. The danger lies not so much in the Iranian nuclear program itself, but in the confrontation and policy of sanctions, military threats, and Iran's isolation to achieve U.S. strategic goals. Therefore, the question of how to assess Iran's nuclear program in the context of regional and international security merits special study, which is undertaken in this paper. All of this necessitates examining Iran's nuclear program through the lens of broader global security issues. The situation surrounding Iran's nuclear program is also worth considering, largely in the context of the thirty-year standoff between the U.S. and Iran, the latter's aspirations for regional hegemony, the fundamental differences in the two countries' leaderships' views on the structure of the modern world and each other's place in it, and the resolution of many international problems, including Afghanistan, Iraq, and the Palestinian-Israeli peace process. This has a significant impact on discussions regarding the preservation of the nuclear non-proliferation regime, the effectiveness of international organizations such as the IAEA and the UN, and has a significant impact on multilateral and bilateral relations.

This issue of the journal presents two book reviews on the geopolitics of the Balkans, digital humanism, and the humane dimension of the transformation of democracy, economy, and culture in the digital age. Geopolitically, the Balkans are one of the most significant cross-border regions in the global political landscape, boasting both a favorable geostrategic position and a high potential for conflict. The historical rivalry between great powers for control of the Balkans has now taken on a new form, based on geoeconomic principles. In the context of digitalization, the humanities are

striving to adapt to ongoing changes, attempting to enhance their own status and build a knowledge system modeled on the natural sciences, striving to operate with a formalized language and utilize methodologies characteristic of the natural and technical sciences. Thus, in the context of digitalization, both established and emerging technologies are actively developing: artificial intelligence, virtual, augmented, and mixed reality, distributed ledger technology or blockchain, additive manufacturing, and multidimensional printing. These technologies have a significant impact on both the economy and the social sphere, and they generate far more than just benefits.

Editorial Board

MEASURING THE POLITICAL SYSTEM STABILITY OF ARMENIA AND ISRAEL FROM 2008 TO 2023: A COMPARATIVE ANALYSIS USING THE SIPS MODEL

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Abstract

This article examines the political stability of Armenia and Israel from 2008 to 2023 using the Stability Index of Political Systems (SIPS) model in a comparative context. The article aims to identify the extent to which internal and external factors shape the stability of political systems in small and medium-sized states in the face of a number of regional and global challenges and risks. The comparative analysis reveals that the experiences of both Armenia and Israel reveal a broader pattern: in small and medium-sized states, particularly those located in geopolitically sensitive and security-challenged regions, political stability is primarily determined by the dynamics of external factors. The results indicate that in both countries, external influences, particularly those related to the national security environment, regional conflicts, and foreign policy pressures, had a dominant impact on domestic political processes and institutional stability. In this context, by highlighting the primacy of external factors, the article contributes to the academic debate on how small states ensure their political stability in the face of persistent regional and global vulnerability.

Keywords: *political system stability, institutional stability, Armenia, Israel, small states, geopolitical vulnerability, national security, regional conflicts, foreign policy pressures.*

Introduction

In political science, approaches to measuring phenomena and processes, the methodology of empirical research, and the quantitative analysis of data constitute contemporary and important issues. These approaches enable more in-depth and precise analyses and assessments, thereby allowing scholars to identify trends in the development of various phenomena and processes. One of the effective tools for conducting measurement, comparison, and analysis in political science is the method of constructing indices. The first indices that made it possible, albeit to a limited extent, to study and evaluate the dynamics of the socio-political sphere emerged as early as the 1960s. Measurements, modelling, and forecasting of political stability make it possible

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to assess risks and to adopt effective policy decisions and solutions. Moreover, quantitative methods for measuring political stability allow for comparisons both across different periods within a single country and between different countries according to their levels of political stability. This is essential for evaluating not only negative trends in stability but also patterns of sustainable development. In more comprehensive analyses of political stability, scholars often distinguish the political, economic, and social factors that condition a state's stability. Based on this premise, the present study employs the Stability Index of Political System developed by Arusyak Aleksanyan. This index is widely used in Armenian-language scientific papers examining the stability of political systems in Armenia and other countries of the region (Aleksanyan 2018, 16-27). The distinct feature of this index lies in its comprehensiveness: it conceptualises political stability through the lens of political, social, and economic factors. In other words, it represents the aggregate of three separate components-the Political Factors Index, the Social Factors Index, and the Economic Factors Index, drawing on other indices of political stability as its data sources (Aleksanyan and Aleksanyan 2021, 14). According to the logic of this approach, political, social, and economic factors exert varying degrees of influence on the political system, which determines the hierarchy assigned to these factors. Accordingly, the Stability Index of Political System is calculated on the basis of the weighted arithmetic mean of the Political Factors Index, the Social Factors Index, and the Economic Factors Index (Aleksanyan and Aleksanyan 2021, 25).

The choice of Armenia and Israel, as well as the comparison of the factors influencing the stability of their political systems, is grounded in several considerations. First, both countries share the same parliamentary system of governance. They are situated in complex geopolitical environments, maintain tense and non-amicable relations with certain neighbouring states, and face closed borders. Both countries also experience, at times, similar domestic political dynamics (protest actions, demonstrations, and pre- and post-electoral tensions) that affect political stability. Additionally, both states are shaped by the influence of a substantial diaspora and, finally, by exceptionally high levels of militarisation (Bayer 2023, 9). Moreover, Israel has never been included within the scope of studies applying the Stability Index of Political System, and the level of its political stability has not previously been measured using this model. Within the framework of this research, more than 1,100 data points have been collected and analyzed. These data were drawn not only from the databases of statistical services in both countries, but also from reputable international reports and the databases of international organizations.

Political Factors Index

The first component of the Stability Index of Political System, the Political Factors Index, is calculated based on six indicators: foreign direct investment (with data sourced from the World Bank database), the Index of Economic Freedom, political rights and civil liberties (both drawn from Freedom House's annual *Freedom in the World* reports), the Corruption Perceptions Index, and, finally, the conflict presence and civil disobedience, which are assessed according to events occurring in the country during the given year. The evaluation of the latter is carried out by the researcher. An

examination of data on foreign direct investment (FDI) inflows in Armenia and Israel reveals an interesting picture. The available data show that major global events exert significant, though not always uniform, effects on investment flows. For example, in 2008, the volume of FDI to Armenia amounted to 943,733,060 USD, while in Israel it reached 10,274,200,000 USD (World Bank, FDI net flows). The situation changed sharply in 2009, when this figure decreased to 760,040,746 USD in Armenia, whereas in Israel, the decline is much more substantial, resulting in an FDI volume of 4,606,900,000 USD (World Bank, FDI net flows). The primary reason for this decline was the Financial crisis, which affected the business and services sectors worldwide. Investors began to avoid risk, and uncertainty in global markets led to capital outflows (Needham and Needham 2023, 49). In 2014, due to the Russia-Ukraine conflict, the West imposed sanctions on Russia (Viktorov 2020, 488), which was Armenia's number one economic partner and the source of a significant share of its investments. These Western sanctions dealt a severe blow to the Russian economy, and the ruble fell by approximately 50% (BBC, 2014). This led in 2015 to a reduction in remittances to Armenia, a decline in consumption, and a decrease in investment inflows from Russian businesses. Moreover, in 2015, the Armenian economy was significantly affected by the continued decline in global copper prices. In January 2014, the international price per ton was 7,500 USD, whereas by January 2015 it had fallen to 5,500 USD (Hergnyan 2015). When international metal prices decline, mining and metallurgical companies tend to postpone the implementation of their investment projects, waiting for a more favourable period. This, in turn, affects both the flow of foreign investment and overall economic development. In Israel, a significant decline occurred in 2014 as well. One of the causes was the summer military operation "Protective Edge" conducted in the Gaza Strip, which generated economic uncertainty and heightened investor concerns. Such situations typically prompt caution among foreign investors due to security risks, political instability, and potential damage to infrastructure. An interesting and irregular pattern emerged in 2020, during the global COVID-19 pandemic. Since 2001, the volume of foreign direct investment in Armenia reached a historical low in 2020, amounting to 58,582,750 USD, a 41.59% decrease compared to 2019. The last time such a low level was recorded was in 1997, when it totaled 51,940,000 USD (World Bank, FDI net flows). In the case of Armenia, this decline was driven not only by the COVID-19 pandemic but also by the 44-Day War. In contrast, in Israel, foreign direct investment in 2020 not only did not decrease but increased by 17.22% compared to the previous year, reaching the highest level recorded since 1970 - 20,968,700,000 USD (World Bank, FDI net flows) (The World Bank Group 2025c). This growth was primarily due to investments in the high-tech and healthcare sectors. The peak in foreign direct investment for both countries was observed in 2022. In Armenia, this was largely driven by investments in the mining and energy sectors (Hergnyan 2022), as well as by capital and investment inflows resulting from the Russia-Ukraine war. And for Israel, this was not only related to the inflow of investments in cybersecurity, fintech, and biotechnology, but also to the implementation of the Abraham Accords, which facilitated the attraction of investments from Gulf countries, particularly the United Arab Emirates, into the Israeli economy (Abbas 2024).

Regarding the Index of Economic Freedom, in the Stability Index of Political System, it is calculated based on the data from The Heritage Foundation's *Index of Economic Freedom*, taking into account the overall score of each country. During the period, the scores for Israel and Armenia fluctuated between 60 and 80 points (The Heritage Foundation 2025). Accordingly, in different years, both countries were classified either as "mostly free" or "moderately free." In the case of Armenia, the increase is much more noticeable. However, for both countries, there is no clear trend of consistent growth or decline.

The next two indicators of the Political Factors Index are Political Rights and Civil Liberties, for which the source is Freedom House's annual *Freedom in the World* reports. In preparing these reports, the authors utilize a variety of information sources, including analytical and news materials, as well as reports and data from international and local organizations. The resulting scores are then normalized on a 1-7 scale, where 1 represents the highest level of freedom ("free") and 7 the lowest ("not free") (1-2.5 = "free," 3-5 = "partly free," 5.5-7 = "not free"). Analysis of political rights data reveals that the situation in the two countries differs significantly. Israel has consistently been classified as "free" during the observed period, whereas Armenia has alternated between "not free" and "partly free." Moreover, in Israel, a decline in the score is observed between 2018 and 2023 (from 1 to 2), primarily due to issues related to the political rights of ethnic, religious, and other minority groups. In this context, the data mainly concern Israel's Arab-speaking minority. In contrast, analysis of Armenia's data shows an improvement over time: a score of 6 for 2008-2011, 5 for 2012-2017, and 4 for 2018-2023 (Freedom House). These periods correspond to changes in the country's ruling elite: 2008-2011 aligns with the end of President Robert Kocharyan's term and the first term of President Serzh Sargsyan; 2012-2017 corresponds to the conclusion of Sargsyan's first term and his second term; and 2018-2023 coincides with Prime Minister Nikol Pashinyan's tenure. Moreover, this improvement also coincides with Armenia's transition to a parliamentary form of governance. Regarding civil liberties, Armenia's score remained stable at 4 ("partly free") throughout the entire observed period.

In contrast, Israel experienced a decline. From 2008 to 2016, Israel was classified as "free" in terms of civil liberties, but beginning in 2017, it moved into the "partly free" category, with its score falling from 2 to 3 (Freedom House). This change was primarily due to amendments made in 2016 to Israeli legislation on the transparency and disclosure of foreign funding for civil society organizations. The amendments required organizations receiving 50% or more of their funding from foreign sources to disclose this information in all publications, communications with public officials, reports, public advertisements, and to list the names of donor organizations. These changes sparked a significant wave of protest across Israel.

The next indicator of the Political Factors Index is the Corruption Perceptions Index. Its source is the eponymous index maintained by Transparency International, which is published annually. In the index, country scores are derived from expert surveys and evaluated on a 0-100 scale, where 0 represents the highest level of corruption and 100 the lowest (Transparency International). Studying this indicator is important because the level of corruption and the associated scores can provide insight

into the quality of a country's governance system. A comparison of Armenia and Israel shows that Israel is in a considerably better position in terms of perceived corruption. Moreover, Israel's lowest score during this period, recorded in 2011 (5.8), is higher than Armenia's highest score during the same period, which was 4.9 (standardized) in 2021 and 2022. At the same time, it is evident that Armenia has experienced an improvement: its score increased from 2.9 in 2008 to 4.7 (standardized) in 2023, representing approximately a 62% increase.

In contrast, the trend in Israel has been much more modest, with scores of 6 and 6.2, respectively. Overall, the general trend for Armenia is positive. Although a decline was observed between 2008 and 2011, the score began to rise from 2012 onward, reaching its peak in 2020–2021. Regarding Israel, it would be inaccurate to claim a negative trend; rather, there is no clearly positive or negative trajectory. Certain factors have affected the situation, including corruption scandals involving high-ranking officials, notably Prime Minister Benjamin Netanyahu ("Netanyahu Cases"), and contentious reforms in the judicial system, which led to hundreds of thousands of citizens protesting in 2023. Researchers have noted that these changes may weaken the judicial system's checks and balances on government power, potentially fostering systemic corruption and undermining the stability of the political system (Ginsburg 2023, 395).

The next indicator of the Political Factors Index is the presence of conflicts. It is assessed by the researcher applying the index using a 0–2 scale, where 0 indicates the absence of conflict, 1 signifies the presence of a passive conflict-i.e., when a state is technically in conflict with another state but no active hostilities occur-and 2 represents an active conflict, in which the conflict involves ongoing military operations (Aleksanyan and Aleksanyan 2021, 24). During this period, both Armenia and Israel experienced active conflicts with neighbouring country or countries. This explains why, for both countries, no year within the observed period was assigned a score of 0. From the perspective of this indicator, the most problematic years for Armenia were 2016, 2020, 2022, and 2023. Among these, 2020 was the most critical, due to the 44-Day War, whereas in the other years, recorded military clashes were far smaller in intensity and scale. In Israel, the situation differs significantly. For this country, 2008 was among the most problematic years, primarily due to Operation *Cast Lead* and the Israeli invasion of Gaza. Other years in the same category include 2012, linked to Operation *Pillar of Defense*; 2014, associated with Operation *Protective Edge*, the intensive mutual rocket fire between Israel and Hamas, and the Israeli incursion into Gaza, which resulted in a high number of civilian casualties, particularly in Gaza; 2018, marked by mass protests at the Gaza border known as the "Great March of Return," as well as tensions arising from the U.S. recognition of Jerusalem as Israel's capital, which escalated clashes between Israeli and Palestinian populations; 2019, during Operation *Black Belt*; 2021, with intense clashes with Hamas; and 2023, which became the peak of Israel-Hamas confrontation. On October 7 of that year, following Hamas attacks on Israeli territory and the taking of hostages, Israel launched an air offensive against Gaza, later expanding to a ground operation (Abbas 2024).

The final indicator of the Political Factors Index is civil disobedience. This encompasses the number of assemblies, demonstrations, strikes, political acts of disobedience, and socially motivated disturbances occurring within a given period in a

country (Aleksanyan and Aleksanyan 2021, 24). It is assessed using a 0–5 scale, where 5 represents the highest level of disobedience, including the presence of coups or revolutions, and 0 indicates their complete absence. Both Armenia and Israel, particularly in recent years, have consistently been characterized by the intensity of domestic political events, protest actions, and demonstrations. During the observed period, neither country received a score higher than 4 on this indicator. In Armenia, high levels of civil disobedience were recorded in 2008, 2016, 2018, 2020, and 2021, with the peak occurring in 2008. This was linked to protests following the presidential elections in February of that year, which culminated in the events of March 1. The high score in 2016 was associated with the seizure of the Police Patrol Regiment in Yerevan and the subsequent protests, during which clashes occurred between police and citizens, particularly in Yerevan's Sari Tagh district. In 2018, elevated civil disobedience was due to the Velvet Revolution, in 2020 to protests following the 44-Day War, and in 2021 to protests that began the previous year and partially resolved with the parliamentary elections in June 2021, which resulted in the re-election of the ruling authorities (Aleksanyan 2025). Notably, before 2018, protests in Armenia were both political and social in nature, whereas from 2020 onward, they have been primarily political, linked to foreign policy and security issues. For Israel, the highest scores were observed in 2011, 2018, 2019, and 2023. The historical peak occurred in 2011, when intense social protests took place from July to October in Tel Aviv and other Israeli cities, accompanied by clashes with the police and the use of tent-based protest methods. In 2018, mass protests emerged following the passage of the Basic Law declaring Israel as the "Nation-State of the Jewish People." Non-Jewish residents of Israel and inhabitants of Palestinian territories argued that the law was discriminatory, despite its declarative nature (Jabareen and Bishara 2019; Hostovsky Brandes 2018; Medina and Bloch 2023). Additionally, protests along the Gaza border began that year, resulting in 223 deaths and more than 9,000 injuries in Gaza (Cumming-Bruce, 2019), most victims being targeted by live fire. These events also sparked protests within Israel itself. In 2019, protests at the Gaza border continued, and Israel held three parliamentary elections within one year, each preceded and followed by protests, primarily criticizing Prime Minister Benjamin Netanyahu. In 2023, the situation intensified not only in terms of military operations but also in civil disobedience. Months-long protests took place in Tel Aviv, Haifa, and other major cities, with hundreds of thousands participating to oppose controversial judicial reforms (Tsujita 2025; Navot 2023). These demonstrations were frequently accompanied by clashes with police. Tensions escalated to the extent that numerous soldiers in the Israel Defence Forces (IDF) threatened to leave military service, prompting intervention by Defence Minister Yoav Galant and calls to Netanyahu to halt the reforms (Al Jazeera 2023). As in Armenia, Israel does not exhibit a clear trend in this indicator over the observed period. The intensity of civil disobedience fluctuates, rising and falling temporarily. However, unlike Armenia, where recent protests are mainly political in nature, protests in Israel also retain significant social and economic dimensions.

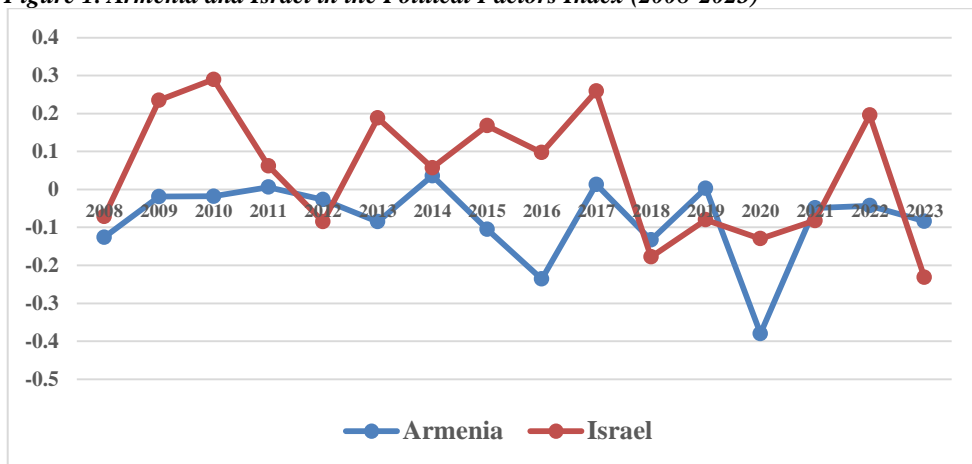
Figure 1. Armenia and Israel in the Political Factors Index (2008-2023)¹

Figure 1 illustrates the fluctuations of the Political Factors Index, which is the composite indicator of the measures discussed above. During the observed period, Armenia's Political Factors Index was predominantly negative, showing positive stability only in 2011, 2014, 2017, and 2019, when no large-scale political events occurred that could have caused systemic instability. As shown in the figure, the lowest score was recorded in 2020, surpassing the previous major low in 2016. From 2021 through 2023, the index remained consistently negative. In Israel, the Political Factors Index was mainly positive throughout the period, exhibiting negative stability scores only in 2012, 2018, 2019, 2021, and 2023, during which large-scale political events occurred that triggered systemic instability. The lowest score for Israel was recorded in 2023, exceeding the 2019 level. For both countries, there is no clear trend in stability. The index fluctuates continuously depending on internal and external factors.

Social Factors Index

The Social Factors Index, which is a part of the Stability Index of Political System, is also calculated based on six indicators: the Human Development Index, sourced from the annual *Human Development Reports* published by the United Nations Development Programme (UNDP 2025); real wages, obtained from the respective national statistical services; the employment rate, sourced from the International Labour Organization (ILO) database; the poverty rate; the Gini coefficient, with data for Armenia taken from the National Statistical Committee of the Republic of Armenia and for Israel from the World Bank database; and the number of crimes per 1,000 inhabitants.

The Human Development Index, a key indicator of societal well-being, is measured on a scale from 0 to 1, where 0 represents the lowest level of human development and 1 the highest. Analysis of the available data confirms that Armenia exhibits a consistently positive trend in human development, with the 2023 value showing an 8.38% increase compared to 2008. Israel also demonstrates a stable positive trajectory,

¹ The indicators are comparable in terms of trends and the specific years for each country.

with its Human Development Index rising by 4.46% since 2008 (UNDP 2025). Overall, both countries display very high levels of human development.

The real wages indicator reflects the purchasing power of nominal wages during the observed period. That is, the quantity of goods and services that can be acquired with a given wage at the prevailing prices (Aleksanyan 2018, 22). Real wages are calculated as the ratio of the average monthly nominal wage to the consumer price index. Both of these measures must correspond to the specific period under consideration. Since the comparison is made between Armenia and Israel, the average monthly wages in both countries were converted into U.S. dollar purchasing power equivalents. During this period, real wages in both Armenia and Israel experienced fluctuations, though the overall trend is positive. Analysis of the data shows that Israel's real wage levels exceed those of Armenia several times, reflecting the higher level of economic development in Israel. At the beginning of the period, Israel's real wages were more than eight times higher than Armenia's, but by 2023, this gap had narrowed to 4.8 times. In Armenia, the growth of real wages has been gradual, with significant increases observed in 2022 and 2023. In Israel, real wages grew very slowly between 2008 and 2014, and occasionally declined, due to global economic shocks and changes in local productivity. From 2015 to 2019, moderate growth in real wages was observed, driven by rising employment and the steady expansion of the high-tech sector. Between 2020 and 2023, although average monthly nominal wages increased, inflation offset these gains, resulting in little visible improvement in real wages and even some declines in purchasing power.

The employment rate is another key indicator of societal well-being in a given country. Since employment is measured as the percentage of the population that is employed, the Social Factors Index sets its minimum value at 0% and its maximum at 100%. During this period, Armenia's employment rate fluctuated between approximately 49.4% and 53.9%, whereas Israel's rate was significantly higher, ranging from 57.9% to 62.9%. The highest employment level in Armenia was recorded in 2022 at 53.85%, and in Israel in 2018 at 62.86%. Regarding growth trends, 50.02% of Armenia's population was employed in 2008, increasing to 53.81% in 2023. In Israel, the employment rate rose from 57.97% in 2008 to 62.61% in 2023 (The World Bank Group 2025a). Overall, the data indicate a general upward trend in both countries, although temporary declines were observed during the period.

The next indicator reflecting societal well-being is the poverty rate. For normalization purposes within the index, the minimum value is set at 0% and the maximum at 100%. Contemporary definitions of poverty are based on the concept of poverty as a multidimensional phenomenon. According to the report of the Statistical Committee of the RA, *"The Social Snapshot and Poverty in Armenia 2024"*, which covers the period 1996–2023, the assessment of poverty in Armenia is based on the "basic needs cost" method. This method expresses the monetary value of the consumption basket required for households to satisfy their essential food and non-food needs (The Statistical Committee of the RA 2025, 126). Accordingly, households whose consumption or income is insufficient to meet the cost of this basket are classified as poor. According to the Statistical Committee of Armenia, by the end of the observed period (2023), the monthly average poverty line was 53,590 AMD (The

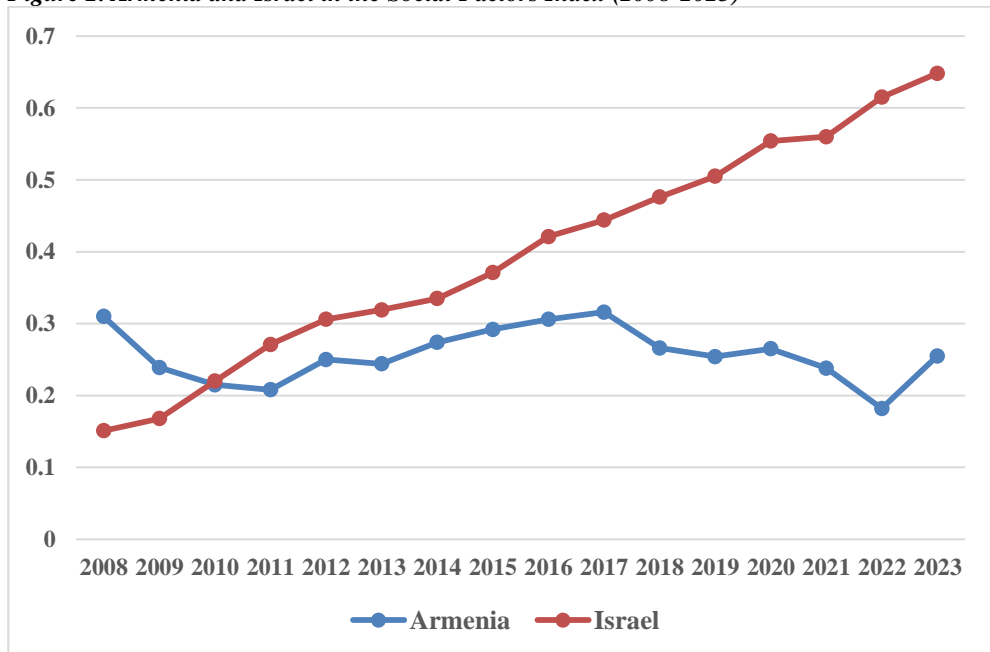
Statistical Committee of the RA 2025, 31). Analysis of the available data shows that Armenia's poverty rate exhibited a generally declining trend, although it increased by 19.06% in 2009, rising from 27.6% in 2008 to 34.1% in 2009, due to the impact of the global financial crisis. From 2011 to 2018, the poverty rate demonstrated a steady decline. A slight increase was recorded over the following two years, attributable to various objective and subjective factors. The Statistical Committee's report "*The Social Snapshot and Poverty in Armenia 2019*", published in November 2020, noted a methodological change in the calculation of poverty. Accordingly, the 2019 poverty rate (26.4%) is not directly comparable with the 2018 figure of 23.5%, due to changes in the poverty threshold as well as in the methods for measuring consumption and poverty. In 2020, the deepening of poverty was driven by the COVID-19 pandemic, which led to the closure of many workplaces, and by the 44-Day War. From 2021 to 2023, the poverty rate in Armenia decreased. The methodologies for calculating poverty in Armenia and Israel differ and are not directly comparable. Nevertheless, other internationally comparable measures indicate that Israel is in a more favourable position. During this period, Israel's poverty rate generally showed a stable decline, although minor increases were recorded in certain years. The only major exception was 2009, when, due to the global financial crisis, Israel's poverty rate rose by 7.55% compared with the previous year. Despite this, Israel, compared with many other OECD countries, still experiences a relatively high poverty rate. Among the contributing factors is the religious aspect: many ultra-Orthodox Jews refuse not only to serve in the military but also to work at all, which exacerbates poverty levels. Additionally, poverty is primarily concentrated among the Arabic-speaking population.

Closely related to the poverty rate is another indicator: the Gini coefficient. This measures income distribution inequality within a country or group. In the case of perfectly equal distribution, the coefficient equals 0, while under absolute inequality it reaches 1. Analysis of the available data for the 2008-2023 period, provided by the Statistical Committee of the RA and the World Bank, shows that income polarization in Armenia is much lower than in Israel. Moreover, no clear trend in polarization is observed in Armenia. Over the period, it has both gradually increased and decreased at different times. In 2008, Armenia's Gini coefficient was 0.339, rising to 0.348 by 2023 (an increase of 2.65%). In Israel, despite a comparatively higher level of income inequality, the Gini coefficient shows a generally decreasing trend. In 2008, the coefficient was 0.416, declining to 0.379 in 2023, representing a reduction of 8.91% (World Bank, Gini index) (The World Bank Group 2025d).

The final indicator used in calculating the Social Factors Index is the number of crimes per 1,000 inhabitants. Social problems often contribute to an increase in crime rates. For this indicator, data for Armenia were drawn from the RA Statistical Committee's database, while for Israel, data were sourced from the Central Bureau of Statistics' annual *Israel in Figures* reports. Analysis shows that at the beginning of the observed period, in 2008, Armenia had 3.19 crimes per 1,000 inhabitants, rising to 13.60 by 2023. This sharp increase (approximately 326%) is partly methodological. Specifically, from 2022, a revised version of the Criminal Procedure Code came into effect. Before this revision, a criminal case in Armenia was initiated only when factual evidence was available. Starting July 1, 2022, a criminal case can be initiated for nearly

any incident, which has greatly increased the recorded number of crimes. For instance, before the revision, sudden deaths were not registered as criminal cases. Nevertheless, certain types of crimes have increased since 2018. For example, over 4,000 serious crimes were recorded in 2019, while by 2023 this number exceeded 6,000, driven in part by large-scale drug trafficking and illegal arms circulation (Stepanyan 2024). In Israel, although there is a clear decreasing trend in crime rates, the number of crimes per 1,000 inhabitants remains relatively high. In 2008, this figure was 57.44, declining to 30.77 in 2023. This means that in 2023, Israel recorded 17 more crimes per 1,000 inhabitants than Armenia. However, unlike Armenia, Israel faces significant challenges in ensuring internal security, which continues to strongly influence the overall crime rate.

Figure 2. Armenia and Israel in the Social Factors Index (2008-2023)²



As shown in Figure 2, which is based on the analysis of six indicators, the Social Factors Index for both countries remained entirely positive throughout the observed period. In Israel, the trend has been generally positive, with slight setbacks in recent years, whereas in Armenia, the trend has been negative.

Economic Factors Index

The third and final index that comprises the Stability Index of Political System is the Economic Factors Index, which is also calculated based on six indicators: GDP per capita (PPP), external trade turnover, domestic credit, inflation, the size of the shadow economy, and the budget deficit. The first indicator of the Economic Factors Index,

² The indicators are comparable in terms of trends and the sp PPPecific years for each country.

which is part of the measurement of the Stability Index of the Political System, is GDP per capita (PPP). This indicator also serves as an important measure of societal well-being and economic growth. For the analysis of the observed period, data from the World Bank database were used for both countries. The analysis shows that, in terms of GDP per capita, Armenia recorded its highest value in 2023 at USD 21,343, representing the highest level since the country's independence. The lowest value during the observed period was in 2008, at USD 7,827. Consequently, GDP per capita in Armenia increased more than 2.7 times over this period.

Furthermore, the trend of GDP per capita growth in Armenia has been generally steadily positive, with the exceptions of 2009 and 2020, when it decreased by 12.97% and 1.8%, respectively, compared to the previous years. These declines were primarily due to the global financial crisis, the economic impacts of the COVID-19 pandemic, and, to some extent, the 44-Day War. In the case of Israel, the dynamics were also predominantly positive. Minor decreases in GDP per capita occurred in 2014, 2020, and 2023, compared to the previous year, amounting to 0.03%, 0.9%, and 0.3%, respectively. As in Armenia, these declines were short-term, followed by renewed growth in subsequent years. In both countries, the main contribution to GDP growth was driven by trade and services. The data indicate that, while GDP in Armenia had been growing at an average rate of 5.6% before 2022, in 2022 it surged by 20.3% compared to 2021, and in 2023 it grew by 11.4%. This increase was partly due to a significant expansion in exports resulting from the Russia-Ukraine war (Ktoyan, Shirinyan and Khachatryan 2023, 31). In Israel, GDP growth was also recorded in 2022, but at a more moderate rate of 13.74%, mainly due to post-COVID recovery and the expansion of the high-tech industrial sector (Eckstein 2023, 3; Scheer 2023; Alagha and Hussein 2024).

The second indicator within the Economic Factors Index is the volume of external trade turnover. The data were obtained from the Statistical Committee of the RA and the World Bank databases. In analyzing these data, the study considered the annual volumes of imports and exports of goods and services. Compared to the previous year, Armenia recorded a decline in trade turnover in 2009, 2015, and 2020. These decreases were mainly attributed, respectively, to the global financial crisis; Western sanctions imposed on Russia, which led to a depreciation of the ruble and a reduction in Armenia's trade turnover with that country; and the COVID-19 pandemic, which significantly impacted global trade. The analysis shows that by the end of the observed period, Armenia's foreign trade turnover had increased approximately 3.88 times compared to its initial level. Notably, a sharp rise in external trade turnover was recorded starting in 2022, when it increased by 59% compared to the previous year. This increase was even more pronounced in 2023, when trade turnover grew by a record 66.65% relative to 2022. In both cases, the growth was driven primarily by an increase in export volumes. One reason for this sharp rise was the expansion of re-export volumes to Russia as a consequence of the Russia-Ukraine war. Armenian companies took advantage of Western sanctions imposed on Russia and began re-exporting goods to that country (Financial Times 2023). Moreover, as a result of this process, one Armenian company was placed under U.S. sanctions (Hergnyan 2023). This change is also reflected in the list of major taxpayers: for example, according to

data for January–December 2023, companies engaged in the sale of electronic equipment appeared in the top five, whereas in the first quarter of 2022, one of them ranked 36th and another 109th. An even more significant factor, however, was Armenia's use as a transit country during this period, particularly for precious metals, which substantially increased trade turnover in U.S. dollar terms (Armenpress 2024). In the case of Israel, the country's trade turnover with other states generally followed a stable upward trend, with slight decreases registered only in 2020 and 2023. The decline in 2020 has a logical explanation: the global situation caused by the COVID-19 pandemic. Regarding 2023, the analysis showed that the decrease occurred mainly in the fourth quarter (The Times of India 2024), coinciding with the outbreak of hostilities between Israel and Hamas. The study indicates that by the end of the observed period, Israel's foreign trade turnover had increased approximately 1.8 times compared to its initial level, reaching 297,017,514,802 USD in 2023. However, this figure is not the highest of the period: the peak was recorded in 2022, when Israel's foreign trade turnover reached 318,495,248,590 USD. This means that wartime conditions contributed to a 6.75% decline in trade turnover in 2023 compared to 2022.

The third significant indicator within the Economic Factors Index is the volume of credit allocated to the economy. This indicator reflects what percentage of GDP is constituted by financing provided by the financial sector to the economy. According to the World Bank methodology, this includes exclusively domestic gross credit issued to all sectors except the government, for which only the net value is calculated. An examination of Armenia's data shows that between 2008 and 2020, the volume of credit to the economy increased from 18.59% of GDP to 83.40%, rising by approximately 65 percentage points. After 2020, however, this indicator began to decline somewhat, reaching 64.99% of GDP in 2022, before rising again to 68.80% in 2023 (World Bank, Domestic credit provided by financial sector) (The World Bank Group 2025b). Considering the performance of other economic factors during this period, including GDP growth and the expansion of external trade turnover, this increase indicates a steady annual expansion of economic activity. Growth in credit volumes can stimulate investment and consumption. However, if the increase is excessively rapid, it may signal rising credit risks or over-indebtedness (Prochniak and Wasiak 2017, 308). In Israel's case, this indicator is considerably higher. Yet, whereas Armenia experienced overall growth followed by a decline between 2021 and 2023, Israel's indicator demonstrates a predominantly downward trend throughout the observed period, decreasing by approximately 11.93 percentage points of GDP. However, unlike Armenia, Israel did not exhibit sharp year-to-year fluctuations. Changes remained within the range of 1%–4%. Between 2008 and 2011, credit to the economy remained very high, fluctuating between 89.92% and 91.99% of GDP. Notably, in 2009, when the world was struggling with the global financial crisis, Israel's credit-to-economy indicator declined by 4.31%. This suggests that the financial sector, acting cautiously in response to heightened risks, adopted a more selective approach to lending. From 2012 to 2017, the decline continued, reaching 79.12% of GDP overall reduction of about 10.8%. Nevertheless, during this period, the volume of credit extended to large enterprises and households remained high (Shemesh and Abir 2024, 187). In subsequent years, the indicator stabilized at around 80% of GDP.

Importantly, in a highly developed economy such as Israel, a decline in this indicator does not necessarily imply economic weakening. It may instead be associated with factors such as economic diversification, whereby firms reduce their reliance on borrowing and shift toward capital markets or foreign investment (Jammeh 2022, 43).

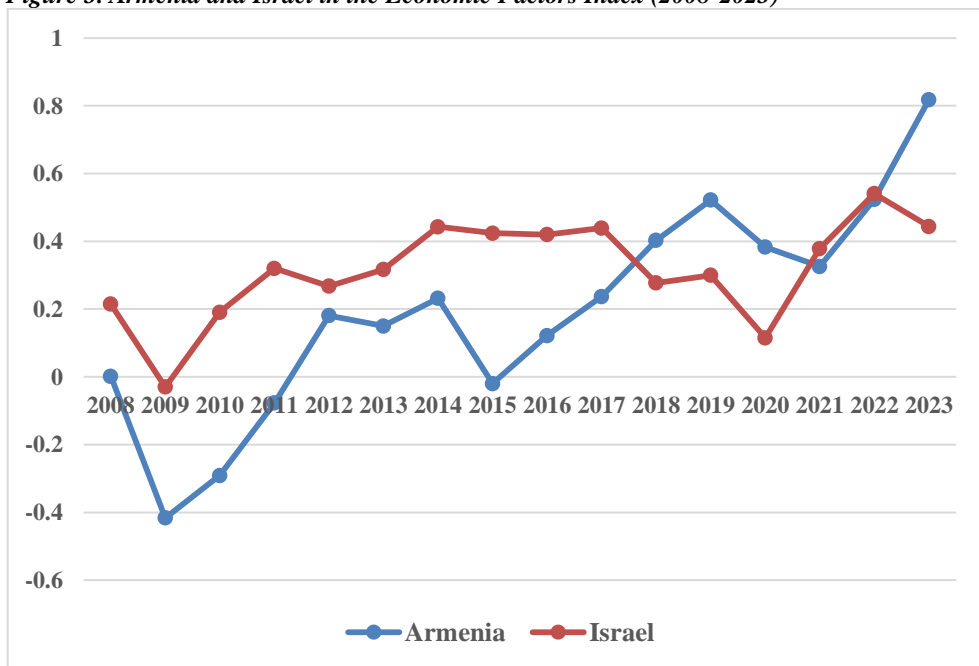
The next indicator, inflation, captures the overall increase in the prices of goods and services in the economy over time. During the observed period, Armenia exhibited no clear pattern of consistently rising or declining inflation. Some years recorded rapid increases in inflation, while in at least one year the inflation rate was negative. The highest inflation rate in this period was recorded in 2008, at 8.9%, whereas the preceding year (2007) had been nearly half that level, at 4.4%. In contrast, in 2016, Armenia registered a 1.6% deflation compared to the previous year. High inflation rates were also recorded in 2010 (8.2%), 2011 (7.7%), 2021 (7.2%), and 2022 (8.6%). In 2022, food prices increased by 10%, restaurant and hotel services by roughly 9%, clothing by 7.2%, and utility prices by more than 8% (Zargaryan 2023). From the perspective of political stability, high inflation can contribute to the destabilization of the political system. Sharp increases in inflation undermine public trust in incumbent authorities, potentially leading to political instability and widespread public discontent. Conversely, political instability, such as frequent cabinet reshuffles, weak institutions, or limited independence of the central financial authority, can hamper inflation control and disrupt policy implementation. In Israel's case, inflation rates were significantly lower and exhibited a generally downward trend between 2008 and 2021. In some years, including 2015, 2016, and 2020, the indicator was even negative. The highest inflation rate in the observed period was recorded in 2008 at 4.55%. Inflation exceeded the 4% threshold again in 2022 and 2023, reaching 4.39% and 4.23%, respectively. In 2022, price increases were particularly notable in real estate, transportation, communications, and food. Furthermore, some researchers argued that the composition of Israeli consumers' expenditure baskets changed after the COVID-19 pandemic, a factor that should be taken into account when assessing short-term inflation dynamics (Benchimol, Caspi and Levin 2022, 11).

The next indicator is the shadow economy, which reflects the portion of economic activity that remains outside state regulation and oversight. Moreover, this segment is not captured in official government statistics (Schneider and Enste 2000, 4). For measurement purposes, both countries rely on the study by International Monetary Fund researchers Leandro Medina and Friedrich Schneider, "*Shedding Light on the Shadow Economy: A Global Database and the Interaction with the Official One*", which provides a global database and examines the interaction between shadow economic activity and official data. According to the study, as of 2017, the global average level of the shadow economy was 30.9% of GDP. The available data show that although Armenia recorded an increase in the size of the shadow economy in 2009 compared to 2008 (reaching 41.8%), the indicator exhibited a downward trend until 2014 inclusive. In 2015, it increased slightly, before declining again through 2017, when it reached 34.5% (Medina and Schneider 2019, 44). Compared with Armenia, Israel's level of shadow economic activity is significantly lower. Despite increases in 2008-2009 and in 2012, the shadow economy in Israel demonstrated a downward trend during 2010-2011 and 2013-2017 (Medina and Schneider 2019, 46). The highest level

recorded during the observed period was in 2009, at 20.5%, while by 2017 it had fallen to 17%, well below the global average. Overall, comparatively low levels of shadow economic activity are common among OECD member states, of which Israel is one.

Finally, the last indicator within the Economic Factors Index is the budget deficit, which arises when government expenditures exceed revenues, and the budget balance is the difference between these revenues and expenditures. The analysis shows that neither country exhibits a clear upward or downward trend, as periods of deficit and relative balance alternate over time. In Armenia, the largest budget deficit during the observed period was recorded in 2009, reaching 7.6% of GDP, while the smallest deficit was registered in the previous year, at 0.7% of GDP. Significant deficits were also recorded in 2016 and 2020, driven, among other factors, by war-related expenditures and subsequent efforts to restore and modernize the armed forces. In the case of 2020, a substantial reduction in government revenues due to the COVID-19 pandemic was also highly relevant (Hergnyan 2021). In Israel, the highest budget deficit was recorded in 2020 at 11.4% of GDP, while the lowest deficits-1.9% of GDP, were observed in 2015 and 2022 (see Figure 3).

Figure 3. Armenia and Israel in the Economic Factors Index (2008-2023)³

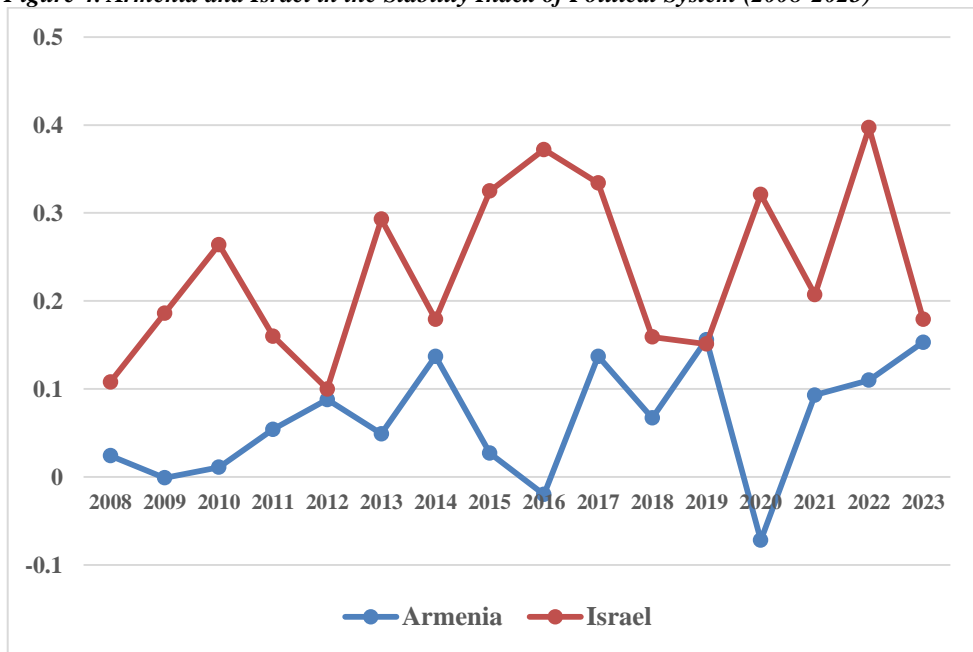


As shown in Figure 3, Armenia's Economic Factors Index was predominantly positive throughout the observed period, displaying sharp declines only in 2009, 2015, and 2019–2021. These downturns were largely driven by challenges in international markets and the Global Financial Crisis. As the figure illustrates, the lowest value was recorded in 2009, and the highest in 2023. Armenia experienced notable increases in

³ The indicators are comparable in terms of trends and the specific years for each country.

2010-2012, 2016-2019, and again in 2022-2023. In the case of Israel, the Economic Factors Index was also largely positive during the observed period, exhibiting a negative stability indicator only in 2009, which was likewise associated with the Global Financial Crisis. As the figure demonstrates, the lowest value was recorded in 2009 and the highest in 2022. Israel also saw sharp increases in 2010-2011 and 2021-2022 (see Figure 4).

Figure 4. Armenia and Israel in the Stability Index of Political System (2008-2023)⁴



As noted earlier, each of the social, economic, and political factors exerted varying degrees of influence on the Stability Index of the Political System. As shown in Figure 4, the Stability Index of the Political System (SIPS) in both countries does not exhibit a clear trend of consistent increase or decrease. Moreover, while Israel's Stability Index of the Political System remained positive throughout the observed period, Armenia's index was negative in 2016 and 2020. In addition, Armenia recorded its highest SIPS value in 2023, whereas Israel reached its peak in 2022. The lowest values were registered for Armenia in 2020 and for Israel in 2012. Unlike Israel, which experienced an increase in its Stability Index of Political System between 2008 and 2010, Armenia saw a decline in 2009, followed by only a slight increase in 2010. The decline in 2009 was primarily driven by a sharp drop in the Economic Factors Index, itself a consequence of the global financial crisis. By contrast, the Political Factors Index showed growth, having declined in 2008 compared with 2007 due to the post-electoral protests and the events of March 1. This suggests that the weakening of Armenia's political system stability during that period was largely the result of internal factors. In

⁴ The indicators are comparable in terms of trends and the specific years for each country.

Israel's case, the increase observed up to 2010 was attributable to the simultaneous rise of all three components. The period from 2010 to 2012 was one of increasing stability for Armenia's political system. Following the global financial crisis, economic indicators began to improve, directly contributing to the rise of the Economic Factors Index. The Social and Political Factors Indices also began to increase, although the latter experienced a decline in 2012. Nevertheless, the growth of the Social and Economic Factors Indices offset the downturn in the Political Factors Index, resulting in an overall upward trend in the Stability Index for 2012. By contrast, this same period marked a decline in Israel's SIPS. Despite an increase in the Social Factors Index, the Political Factors Index fell sharply, and the Economic Factors Index experienced a moderate decline in 2012. The drop in the Political Factors Index was mainly associated with the protest movement that took place in major Israeli cities between July and October 2011, as well as the Israel Defence Forces' *Pillar of Defence* operation in Gaza in 2012. These developments demonstrate that both domestic and external factors played a significant role in weakening the stability of Israel's political system during this period.

The years 2013–2016 represent a period of fluctuations in the Stability Index of the Political System for both Armenia and Israel, albeit with opposing trends. It is during this period that Armenia recorded its highest value for the Political Factors Index, in 2014, yet the declines in the preceding and subsequent years were linked to the post-election protests following the 2013 presidential elections, the socially driven “Electric Yerevan” protests, the 4-Day War, and the demonstrations following the seizure of the Police Patrol Regiment headquarters. In 2015, the decline in Armenia's Stability Index was also driven by a decrease in the Economic Factors Index. After Israel registered its lowest Stability Index value in 2012, the country experienced an increase in 2013, driven by simultaneous growth across all three components, and particularly by a sharp rise in the Political Factors Index. By 2014, however, the Political Factors Index declined again, reflecting the impact of the “Protective Edge” military operation and subsequent anti-war protests, which were concentrated mainly in Palestinian-populated areas. The growth recorded in 2015–2016 occurred despite a decline in the Economic Factors Index and was primarily due to a significant rise in the Political Factors Index and a moderate increase in the Social Factors Index. The period 2016–2023 was one of turbulence for Armenia: periods of increase and decrease in the Stability Index alternated frequently. The entire period was turbulent for Israel as well. Among the contributing factors were the mass protests in Gaza along the Israeli border, which resulted in the deaths of 223 Palestinians, as well as heightened domestic political tensions in Israel, accompanied by demonstrations against the Knesset's passage of the Basic Law “Israel as the Nation-State of the Jewish People.” Between 2016 and 2023, Armenia experienced two major declines in the Stability Index, driven by the 4-Day War of 2016, the 44-Day War of 2020, and the economic restrictions imposed during the COVID-19 pandemic. In 2020, declines occurred simultaneously across the Political, Social, and Economic Factors Indices. As a result, Armenia recorded its lowest level of foreign direct investment during that year, along with reductions in GDP and trade turnover, and sharp increases in credit activity in the economy and in the budget deficit.

Conclusion and discussion

In contrast, during 2021-2023, Armenia's political system and economy began to recover, and by 2023, the Stability Index reached its highest observed value. This improvement was primarily driven by a sharp increase in the Economic Factors Index, itself a result of rising trade turnover, capital inflows linked to the Russia-Ukraine war, and tourism indicators. In Israel, within the broader turbulence beginning in 2018, an upward trend in the Stability Index was recorded only in 2020 and 2022. One of the lowest values of the observed period occurred in 2023, when both the Political and Economic Factors Indices declined. This was largely attributable to the outbreak of hostilities with Hamas in the final quarter of the year and the mass protests that preceded these events, triggered by controversial reforms in the judicial system. Declines had also been recorded in 2019 and 2021, driven by the continued protests by Gaza residents along the Israeli border and the May 2021 armed confrontation with Hamas.

It follows that in both countries, political stability has been predominantly shaped by external factors linked to their security environments and foreign policy contexts. These factors have directly influenced the formation of the domestic political agenda, the government-opposition discourse, and the overall logic of internal political processes. In Armenia's case, the impact of external factors has been particularly pronounced due to the country's dependence on its security architecture, its conflict-prone relations with neighboring countries, and the constraints imposed by its international alliances. The major turning points in Armenia's political developments, such as the 2018 change of power, the 2020 44-Day War, and the subsequent post-war crises, were also indirectly shaped by shifts in regional and global power balances. In Israel, external factors manifested primarily through the dynamics of confrontation with Hamas and the process of normalizing relations with Arab states. Even with well-established state institutions and significant military capabilities, Israel's internal political stability has often been contingent upon fluctuations in the external environment, which have also influenced public attitudes. Thus, the experiences of both Armenia and Israel indicate that in small and medium-sized states, especially those located in security-sensitive regions, political stability is largely dependent on the dynamics of external factors. Ensuring stability, therefore, must be viewed not only in terms of internal institutional strengthening but also through the lens of foreign policy flexibility and the maintenance of strategic equilibrium. This, however, does not imply that the significance of internal factors shaping political stability should be overlooked, particularly in the case of Israel, where any controversial socio-economic policy change can trigger resistance from hundreds of thousands of citizens. Whereas before 2018, political instability in Armenia was driven mostly by domestic factors, including socio-economic conditions, since 2020, external factors have become dominant in shaping political stability. These factors directly influence public cohesion and dialogue among political forces, both of which are essential for maintaining stability. Ensuring political stability requires a balanced combination of domestic and foreign policy. This entails not only mitigating external threats and expanding regional cooperation but also strengthening internal political cohesion, enhancing public trust,

and modernizing institutions. When internal factors affecting stability become manageable, maintaining control over external influences becomes significantly easier.

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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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THE DIFFICULT PATH OF PARLIAMENTARISM IN ARMENIA'S DEMOCRATIC TRANSITION: HOW DOES THE SEPARATION OF POWERS AFFECT POLITICAL RESPONSIBILITY IN AN UNCONSOLIDATED SOCIETY?

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Abstract

This article analyzes the systems of separation of powers in modern conditions using the example of Armenia, which is of considerable scientific interest and has practical significance for the state-building of both Armenia itself and other states that emerged in the post-Soviet space. This significance is determined, first of all, by the processes that accompany the formation of independent statehood in Armenia. The ability of the Armenian statehood to respond to the challenges of the time and form a state mechanism that will ensure the development of society on democratic principles largely depends on the success of the formation of the system of power relations. The issue of the unity of state power and the separation of powers is a multifaceted problem that includes economic, social, political and ideological relations, and as such has always been and remains the subject of political study.

Keywords: *Armenian statehood, democratic transition, parliamentarism, unconsolidated society, political responsibility.*

Introduction

The relevance of this research is conditioned by the need to reinterpret the role of Armenian parliamentarism in the field of building an independent statehood and develop proposals for the separation and balancing of public authorities. From the study of the experience of building Armenian parliamentarism, it can be concluded that the gaps and shortcomings in the system of public authority, among other causes of conflict instability and war, are also due to the imperfect application of the principle of separation and balancing of authorities (Aleksanyan and Aleksanyan 2021). In particular, the framework of political responsibility and parliamentary parties in the executive and legislative branches of government is not clarified, the balance of different branches of government and their functional autonomy and independence are

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not ensured, etc. In my opinion, the above confirms the need for democratic and constitutional reforms underway in our country, as well as implies the elimination of the shortcomings identified in the parliamentary form of government and increasing the efficiency of the operation of public authority (Ihalainen, Ilie, and Palonen 2018; Wessel 2021).

Thus, it can be stated that for the effective implementation of the functions of the National Assembly, a stable majority and the protection of the rights of the parliamentary minority should become the subject of comparative political and legal research. However, it is important to take into account that for the establishment of parliamentary culture, as well as for the appointment to certain higher positions or the formation of constitutional bodies, the definition of a qualified majority of votes is not an end in itself, but a means of protecting the rights of the parliamentary minority (Szentgáli-Tóth 2025). Therefore, the presence of such a parliamentary majority can be considered more acceptable, which, on the one hand, enables the National Assembly to effectively implement its functions, and on the other hand, forces the stable parliamentary majority to also take into account the positions of the opposition.

Parliamentary strategic reforms as a factor of democratic statehood

A prerequisite for the success of parliamentary strategic reforms in Armenia is the mechanisms of separation and balancing of public powers in the field of statehood construction. An important aspect of this is the definition of the forms of development of the presidential institution, Armenian parliamentarism, the executive branch system and the judicial system. Such a concept should not only contribute to the establishment of the prerequisites for the establishment of a democratic, social and legal state proclaimed by the 1995 Constitution of the RA, but also become an effective guide on the path to building a unified and effective mechanism of public power.

The Constitution of Armenia of 1995 and its subsequent amendments in 2005 and 2015 created constitutional and legal conditions for the formation of a democratic, social and legal state. The study of the concept of separation of powers in modern constitutional and political practice of Armenia creates a special opportunity to analyze the problems of the formation of independent states in the post-Soviet space, the conditions for the formation of their political regimes and forms of government. The article examines such little-studied issues and phenomena of the post-Soviet reality as the mechanism for implementing state power in newly independent states, determining the principles of construction and functioning of the system of state authorities (Baykov and Bolgova 2023). The paper examines the issues of the formation of a model of interaction between authorities in the context of the formation of civil society and the establishment of democratic principles in the functioning of the state apparatus. Researchers of constitutional law are called upon to analyze and comprehend the current stage of development of state power in Armenia, to study the model of separation of powers that was formed in difficult foreign policy and economic conditions. The paper analyzes the principles of construction and functioning of the system of state authorities in Armenia. This problem has not only theoretical and legal and constitutional and legal significance, but also an obvious practical aspect, since the democratic development of the country and the maintenance of its stability largely

depend on the choice of the most suitable model of separation of powers for modern Armenia (Aleksanyan and Aleksanyan 2021).

The beginning of the institutionalization of the political system of modern Armenia can be considered the adoption of the Armenian Declaration of Independence on August 23, 1990, which marked the further development of the country in democratic conditions, thereby laying the foundations of modern parliamentarism in Armenian society. On June 25, 1991, the Supreme Council of the RA, based on the provisions of the Armenian Declaration of Independence, taking into account the separation of powers into legislative, executive and judicial branches, adopted a decision on the establishment of the position of President in the RA. The principle of separation of powers was finally enshrined in the Laws of the RA “On the President of the Republic of Armenia” and “On the Supreme Council of the Republic of Armenia” adopted by the parliament. These two most important acts, along with the Armenian Declaration of Independence, became the legal foundations of parliamentarism. Thus, a transition was made from Soviet parliamentarism to modern Armenian parliamentarism.

The aforementioned period in Armenia, as with other post-Soviet countries undergoing transformation, coincided with a multi-vector, interconnected process of political transformation, full of events. In this sense, since independence, Armenia has been seeking more effective ways to modernize society, accompanied by serious ideological contradictions, the essence of which boiled down to a struggle between liberal and conservative principles. As in other societies undergoing transformation, the issue of choosing an effective model of state governance corresponding to the conditions of one's own country was given particular importance in the Republic of Armenia. The post-independence years were a period of deep, radical changes in the modern political history of the RA, which affected the form of government and the development of the political system through various objective and subjective factors. The important factors determining the process of political transformation were the nature of political relations, historical traditions, the social status of Armenian society, the degree of political participation of citizens and the level of political consciousness, socio-historical, spiritual-cultural, civilizational and other prerequisites. The existence of the mentioned prerequisites also conditioned the implementation of democratic values and ideas in our country. In addition, the complex and contradictory process of political transformation in the RA was accompanied by a high degree of conflict in political life, the personification of power, manifestations of unilateral decision-making by government political leaders in transformation processes, and conflict relations between state bodies and civil society institutions. The above-mentioned features of political transformation greatly influenced the process and results of the establishment of parliamentarism in the newly independent Armenia.

With the radical changes that began in the USSR in 1985, the crisis of the Communist Party began in the Armenian SSR. The fall of the totalitarian regime was accompanied by steps aimed at the development of democracy and parliamentarism. On May 20, 1990, the Communist Party was defeated in the elections to the Supreme Council of Soviet Armenia, and the foundations for the formation of a multi-party system were actually laid in Armenia. In the same year, the RA Law on Socio-Political Organizations was also adopted.

In 1990-1991, Armenia developed as a real parliamentary country. The political weight and legislative functions of the Parliament had significantly increased, the Supreme Council had really begun to manifest itself as a parliament, where heated political debates were taking place, ideas and programs for the country's development were being born. However, the situation that began after the presidential elections in 1991 changed. The country's political elite adopted the concept of strong presidential power, which, despite criticism, had serious grounds. In the absence of democratic structures, a war situation, and a growing socio-economic threat, there was a need for a strong hand. The president was given the opportunity to influence all branches of government, the latter formed the executive branch, headed it, etc. If at the initial stage of transformation, in the first years of the Third Republic's independence, the concentration of superpowers in the hands of the president was acceptable in some respects, then after the establishment of stability in the country, such a tendency negatively affected the establishment of democracy (Aleksanyan and Aleksanyan 2021).

Steps aimed at the development of parliamentarism in the RA since 1995 were mainly associated with increasing the role of the parliament and parliamentary oversight in the Constitution. One of the important directions for improving Armenian parliamentarism was the continuous reduction of the powers of the president constitutionally and the expansion of the powers of the parliament. However, as it later became clear, as a result of the Constitutional amendments of 1995 and 2005, no significant changes actually occurred in the role of the president. It should be noted that under the conditions of both the presidential-parliamentary and parliamentary-presidential systems of government, due to the insufficiently developed political, primarily party system, and the low level of political and legal culture, a truly pluralistic system based on the separation of powers was not formed in our country. The parliament was more of a structure legitimizing the decisions of the executive branch than expressing the interests of citizens. In practice, the President of the Republic influenced the three branches of government. Sometimes this influence was masked by the party of power known in political science. Under the conditions of the presidential system of government, the government has always sought to achieve the formation of a political majority in the parliament, since the absence of the latter could lead to the president losing power. In the history of the Third Republic of Armenia, there was only one case, in 1998, when the president of the republic was deprived of the support of the parliamentary majority, which led to his resignation.

The challenges of a new form of governance with old rules of political struggle

In 2015, following the results of a constitutional referendum held in the absence of public demand, Armenia switched to a parliamentary form of government. The ruling party that initiated the constitutional amendments and the forces supporting them celebrated the opening of new opportunities for democratic progress in the country. On April 2, 2017, parliamentary elections were held in Armenia for the first time under the new form of government and transformation. The elections to the National Assembly were held under a proportional electoral system, which was more reminiscent of a majoritarian electoral system, since the rating of a candidate on the party list was

determined by the number of votes he received as much as possible. Both the majoritarian and this electoral system were based on the authority of political figures. As a result of the parliamentary elections, the ruling Republican Party of Armenia was recognized as the winner with 49.15% of the vote and thus actually received the opportunity to elect the Prime Minister of the republic¹. The opposition Tsarukyan Alliance party was the second force with 27.36%, followed by the Yelk alliance and the Armenian Revolutionary Federation Party with 7.79% and 6.57% of the votes, respectively². The election results showed that the proclamation of a parliamentary republic is not sufficient for the development of the parliamentary form of government and culture in the Republic of Armenia. In essence, there were no qualitative changes in the composition and working style of the parliament, since although the Constitution and the system of government were new, the rules of political struggle and the game remained the same. It is also interesting that the election results were not appealed through rallies and street actions. The experience of previous years has called into question the effectiveness of such a cadre of post-election discontent. In addition, this, to some extent, testified to the indifferent moods of society and its alienation from politics. One of the manifestations of the loss of faith in political parties, as well as the public's indifferent attitude towards the institution of parliament, was the low turnout of citizens in the 2017 parliamentary elections. Therefore, it is not surprising that the sixth convocation of the parliament had a short life. As a result of the civil disobedience of 2018, the situation changed with the formation of a government that enjoyed the legitimacy of the people. Thus, the country got an opportunity to follow the path of real parliamentary democracy. Such an opportunity was also visible to the outside world. It is obvious that the newly elected National Assembly received all the opportunities to establish genuine parliamentarism in Armenia, since the parliament was formed through free, fair and transparent elections.

Before the Velvet Revolution of 2018, the political regime established in Armenia was considered undemocratic by various international organizations, opposition political forces, and some civil society organizations (Atanesyan 2018). For example, Freedom House characterized Armenia as a semi-consolidated authoritarian regime, and international election observation missions noted that there was a convergence of the ruling party and the state in Armenia³.

On December 9, 2018, the snap parliamentary elections resulted in a parliament that enjoys the legitimacy of the people. This view was shared by both the government and the opposition, as well as international observation organizations. The OSCE/ODIHR Observation Mission report emphasized that the elections were held with the observance of fundamental freedoms and enjoyed the trust of a wide range of society, which should be maintained through further electoral reforms (OSCE/ODIHR 2019).

The Second Karabakh War of 2020 could not but affect the measures aimed at developing the political system. During the war and the period following it, the parties

¹ OSCE/ODIHR. 2017. "Armenia, Parliamentary Elections, 2 April 2017: Final Report." July 10, 2017. Accessed November 10, 2025. <https://odihr.osce.org/sites/default/files/f/documents/6/7/328226.pdf>.

² Ibid.

³ Freedom House. 2020. "Nations in Transit 2020." Accessed November 10, 2025. <https://freedomhouse.org/country/armenia/nations-transit/2020>.

that had a great influence on the establishment of parliamentarism played a minor role in the political decision-making process in the seventh convocation parliament (Hakobyan and Mollica 2025). The parliament was sometimes used to legitimize the decisions made by the executive branch. The opposition factions “Bright Armenia” and “Prosperous Armenia” used their mandates to criticize the authorities, but they did not have any real leverage. According to the Constitution of the RA and the Law on International Treaties, in the event of the signing of any document related to political, military, as well as human rights, the said document must be ratified by the Parliament of the Republic of Armenia. Meanwhile, the opposition factions of the parliament were informed about the provisions of the November 9 agreement only after its signing. Thus, it should be emphasized that although the parliament was constitutionally endowed with broad powers, in practice the practice of unilateral decision-making, which contradicts parliamentarism, continued.

The path of holding early parliamentary elections was chosen as a consensus solution to resolve the political crisis following the Second Karabakh War in 2020 (Hakobyan and Mollica 2025). The parliamentary elections, which met the standards of democracy, were held under a new, simple proportional electoral system. After the elections, the political struggle moved from the streets to the legislative body, and thus opportunities again opened up for the implementation of policy in the parliament and at the institutional level. Currently, a constitutional amendment commission has been established, which does not ultimately imply holding a constitutional referendum and changing the system of government, but rather correcting the gaps in the constitution. The ruling political force and Prime Minister N. Pashinyan are also convinced that the parliamentary system should remain and new opportunities should be created for its development⁴.

Former President of the RA Armen Sarkissian also noted in his resignation text, emphasizing the issue of improving the system of government: “We are a parliamentary republic in form, but not in content⁵.” He does not see the solution to the problems in the political system in the transition from a parliamentary form of government to a semi-presidential or presidential one, but rather emphasizes the importance of creating a state system based on checks and balances.

I also believe that we should not take a step back and return to a semi-presidential system. Instead, we must address the obstacles hindering the development of a parliamentary form of government. In this regard, the need to develop a culture of political dialogue in the process of strengthening democracy should be addressed. For this reason, A. Aleksanyan notes that it is impossible to imagine democracy, democratization, and domestic and international procedures for protecting human rights and freedoms without civilarchical mechanisms—that is, without the improvement of

⁴ The Office to the Prime Minister of the RA. 2021. “Prime Minister Nikol Pashinyan's speech at the presentation of the Government Action Plan at the National Assembly.” August 24, 2021. Accessed November 10, 2025. <https://www.primeminister.am/en/statements-and-messages/item/2021/08/24/Nikol-Pashinyan-Speech/>.

⁵ The Office of the President of the RA. 2022. “The Statement of the President of the Republic Armen Sarkissian.” January 23, 2022. Accessed November 10, 2025. <https://www.president.am/en/press-release/item/2022/01/23/President-Armen-Sarkissians-message/>.

civil society (Aleksanyan 2020, 35-38). Furthermore, the parliamentary system of government has historically been considered a superior form of organizing political and state power in Armenia compared to others. This stems from the high capacity of parliamentarism, as a system for organizing state power, to govern in both a two-party and a multi-party system.

The analysis of the evolution of modern Armenian parliamentarism, the study of the activities of the eight parliamentary convocations have made it possible to reveal some factors hindering the development of Armenian parliamentarism, as well as to point out positive trends (OSCE/ODIHR 2021).

The tendency towards a patriarchal state model characteristic of the political culture of the Republic of Armenia can explain the phenomenon that even under the conditions of the parliamentary form of government, citizens make their choices by pinning their hopes not on parties, but on the Prime Minister, who embodies the role of the ‘father of the family’. As a result, due to the dominant role of the head of state, which is characteristic of the political system of the RA, in the conditions of the semi-presidential system, the President assumed this role, in the case of the parliamentary system, the Prime Minister assumes it. Thus, the small political influence of the parliament, the fact that key decisions affecting the development of the state are mainly made outside the parliament, are primarily due to the desire for a strong centralized government, a low level of political culture and consciousness.

One of the factors hindering the development of Armenian parliamentarism in the post-independence period is the absence of a strong parliamentary opposition. As the experience of developed democracies has shown, the presence of a well-established opposition in the legislative body of power has a positive, stabilizing effect on the political life of society and prevents the possibility of acute political crises and conflicts or, no less dangerously, apathetic moods in society (Börzel and Pamuk 2012). The existence of a strong opposition in parliament is one of the most important features of parliamentarism⁶. The weakness of the parliamentary opposition is most clearly expressed in the conditions of the dominant party in power. As a rule, in parliamentary countries, the opposition is a minority, consisting of parties that have not occupied the majority of parliamentary seats. The latter’s task is not to govern, but to put forward real alternatives that counterbalance the views of the government and the parliamentary majority⁷. Of course, it is positive when the opposition criticizes the government, but when we evaluate the effectiveness of these criticisms, we see that they have little impact on the final outcome of decision-making if alternative, effective mechanisms are not proposed. The absence of such an opposition in parliament can lead to the emergence and activation of extra-parliamentary opposition forces that consider the street to be the main place for expressing discontent. Naturally, this cannot but negatively affect the work of the parliament and reduce the importance of

⁶ European Commission for democracy through law (Venice Commission). 2010. Report on the Role of the Opposition in a Democratic Parliament adopted by the Venice Commission, at its 84th Plenary Session (Venice 15-16 October 2010), by Angelika Nussberger, Ergun Özbudun, and Mr Fredrik Sejersted. CDL-AD(2010)025. Strasbourg, 15 November 2010. Accessed November 10, 2025. <https://rm.coe.int/report-adopted-by-the-venice-commission-at-its-84th-plenary-session-de/1680b17bca>.

⁷ Ibid.

parliamentary debates. As a result, in the perceptions of the Armenian public, the street is considered the center of change. For example, in 2016, a situation was created when a large part of the public trusted not the political forces represented in parliament, but the armed uprising launched by the extremist group 'Sasna Tsrer', and the public's support for the latter was, in some sense, also an expression of a loss of trust in state institutions.

The weakening of the parliamentary opposition institution in Armenia was significantly influenced by formal coalitions on the one hand, and the lack of consensus between opposition parties on the other. A study of the history of coalitions formed in Armenia shows that their goal was largely to increase the legitimacy of the policy pursued by the government.

One of the most important principles of parliamentarism is the rule of law, which is guaranteed by the Constitution of the RA, but is sometimes ignored in reality. Real democracy is possible only in conditions of equality before the law. No person, be it the President or the Prime Minister, can be above the law.

As a serious problem of parliamentarism in the RA, it is necessary to emphasize the low level of trust of the population in the representative government, which, among other factors, is due to the fact that in the period since 1995, contradictory opinions have been expressed about the results of almost all elections, and elections have not always been an expression of public preferences. Since the parliament is formed as a result of elections by the population, the attitude of citizens towards the institution of the parliament is of great importance. According to the results of the 2022 survey by the International Republican Institute (IRI), the National Assembly has the lowest rating among state institutions in the RA⁸. The low percentage of political activity of the population in parliamentary elections can also be explained by the lack of trust in the National Assembly.

The development of Armenian parliamentarism is complicated by the fact that parliamentarians do not treat their work as a profession. The vicious tradition of regularly skipping sessions of the National Assembly dates back to the formation of the first convocation of the National Assembly. The awareness of participating in parliamentary activities only through physical presence has also hindered the development of the institution of parliament. In both cases, we are talking about the incomplete performance of representative, legislative functions. Unlike Western political culture, where politics is viewed as a calling and profession, such a perception is largely alien to Armenian political culture. The specialization of parliamentary activities has required a long period of time and has not yet reached the completion stage. One of the reasons is that for many deputies, parliamentary activities are a second job and are not a permanent source of income. For years, the government's tendency to take on the legislative function, sometimes coming up with more

⁸ IRI. 2024. "Public Opinion Survey: Residents of Armenia, December 2023." March 11, 2024. Accessed November 10, 2025. <https://www.iri.org/resources/public-opinion-survey-residents-of-armenia-december-2023/>; IRI. 2023. "Public Opinion Survey: Residents of Armenia, January-March 2023." May 1, 2023. Accessed November 10, 2025. <https://www.iri.org/resources/public-opinion-survey-residents-of-armenia-january-march-2023/>.

legislative initiatives than the parliament, has also significantly weakened the weight of the legislative body.

Currently, a positive trend is observed in the professionalization of the parliament. Individual deputies are distinguished by their skills in legislative activity, political management and political communication, and public political activity. Over the years of independence, various parliamentary customs and traditions have been formed. It is obvious that the modernization and specialization of legislative activity have greatly enriched parliamentary traditions. Individual deputies of the National Assembly have learned to cooperate with the mass media and the civil society sector, are distinguished by their abilities to engage in legislative activity, and are well-organized.

There is a tendency to rejuvenate parliamentarians. The age limit of the current parliamentarians is the lowest compared to others. In terms of women's involvement, the greatest representation is also ensured during this convocation. From a quantitative point of view, this is certainly a commendable fact, which, however, would be desirable to be manifested qualitatively as well. It is noteworthy that even in the First Republic in the parliamentary elections held in 1919, women had not only active, but also passive suffrage.

The first parliament of newly independent Armenia, the Supreme Council, continues to remain unsurpassed in terms of the educational level of its deputies, as well as the effectiveness of its discussions. It was composed primarily of intellectuals who initiated the Karabakh movement of 1988, who disseminated ideologies united around ideas. Analyzing the activities of parliaments formed since then, it is clear that inexperienced politicians, with their equally banal ideas and habits, have emerged. The principle of political tolerance and dialogue has given way to an intolerant, yet already empowered, complacent, and self-sufficient common sense. And in this case, the fates of millions of people depend on the competence of parliamentarians and their public decisions. Legislative work is a complex process that requires political culture and party work. Without a parliament composed of knowledgeable members, genuine democracy in the country cannot develop. Beginning with the first convocation of the National Assembly of Armenia, the number of scientists, artists, and human rights activists has declined. Another not so positive trend can be recorded. Currently, the parliament is mostly staffed with representatives from the humanitarian sector. In this regard, it is possible to establish both certain educational censorship and sectoral quotas so that politicians with different professions can enter the parliament. As a result, the composition of the parliamentary corps will be improved and the level of competence of parliamentarians will increase.

Regarding ethnic and religious representation, it should be noted that, aside from quotas for representatives of national minorities, the remaining seats are generally occupied by Armenians. Furthermore, there are no political parties in the Armenian parliament that emphasize religious affiliation, as is the case in several EU member states or in political groups within the European Parliament (Wessel 2021; Silander 2023).

Studying the social composition of deputies of different convocations, we see that starting from the activities of the seventh convocation of the parliament, there has been a tendency to increase the number of representatives of the middle class, which means

that the influence of the class owning large capital on political processes has somewhat decreased. The number of representatives of big business in the parliament has also been significantly reduced.

When assessing the political experience of the current generation of parliamentarians, we discovered that some politicians do not go through the hierarchy of power, which sometimes leads to a lack of deep knowledge of the personnel policy of deputies. Following the Velvet Revolution in Armenia in 2018, the mechanism for recruiting the political elite underwent a transformation, becoming more entrepreneurial and open (Abrahamian and Shagoyan 2018). This, on the one hand, led to a change in the model of recruiting the political elite, bringing it into line with the democratic system of governance. On the other hand, young leaders who have not undergone a normal political socialization process and lack sufficient experience pose a certain risk in terms of political decision-making.

Numerous studies of parliamentarism show that its economic basis is a highly developed market economy, which allows for maximum decentralization of state power. In this regard, the development of parliamentarism can also be facilitated by an increase in the number of representatives of the middle class of society (Davidsson 2025).

The development of parliamentarism in the RA has certain European tendencies, which is conditioned by Western support and inter-parliamentary ties. The amendments to the Constitution in Armenia, among other factors, were conditioned by certain obligations assumed before Europe. It should be noted, however, that the formation and rooting of the liberal values necessary for modern parliamentarism in Western developed democracies took place gradually (Davidsson 2025), and in the difficult socio-economic and political situation in the RA, some time will still be needed. At the same time, one of the most important tasks of the development of the modern Armenia is the maintenance of political stability, the strengthening of democratic institutions and the organization of their effective functioning. The problems facing Armenian parliamentarism should be considered in the context of the problems facing society, therefore, their solution should be systemic.

The solution of the problems hindering the development of parliamentarism is possible only through the joint work and efforts of the government, the opposition and civil society (Aleksanyan 2020). The mentioned parties must be ready to cooperate with each other and realize their responsibility in the development of society (Bruder 2020). In addition, a system of checks and balances is necessary, under which none of the branches of government will be able to dictate its will to the other. In this case, a transition will be made to a qualitatively new political system, political behavior and culture (Börzel and Pamuk 2012). The theory of separation of powers stems from the principle of equality of the three branches of government. Parliamentarism is the interaction of all branches of government for the benefit of the people and the prosperity of the state. It is the development of law and legislative power in conditions of a high level of independence and responsibility of the other branches of government, the executive and judicial (Lavrelashvili and Van Hecke 2023). Parliamentarism implies and means not the opposition of the branches of government, but, on the contrary, cooperation for the benefit of the state and the people. Therefore, it is

necessary to increase the cooperation between the different branches of government and the effectiveness of the legislative process. In this matter, the parliament, repeatedly emphasized by representatives of the theory of separation of powers, can play a special role, since it is the body that expresses the will of the people who hold sovereignty. It is necessary to strengthen and deepen the unicameral parliamentary system, especially if we take into account that Armenia is a monoethnic homogeneous country with a small territory. A bicameral parliament is acceptable and widespread for federal and large-area and population, multinational, multiethnic countries, such as the Russian Federation.

Parliamentarism aims to ensure maximum participation of the people in the governance of the state, since in the transitional regime of representative democracy the legislative power is obliged to exercise its powers. In this regard, parliament plays a central role in the system of public power, especially in ensuring the political majority. For all models of parliamentary government, the issues of ensuring a stable parliamentary majority are of particular importance. Such stability is a necessary prerequisite for the effective implementation of its functions by the parliament. In addition, the stability of the parliament is a mandatory prerequisite for ensuring the stability of the government (Lebanidze 2020). Therefore, it is very important to strengthen the mutual connection between the deputy and the elector, especially when a certain gap is currently observed. Under a simple proportional electoral system, parliamentarians sometimes lose political responsibility and a sense of obligation to the voters. Meanwhile, one of the main goals of the National Assembly is to ensure bilateral communication between the state and society. Ensuring representativeness should not begin and end with elections. Deputies must understand public sentiments, the people-parliament connection must be strong throughout the convocation. To solve the problem of elite-society disconnection, deputies can divide their functions by regions.

We can talk about the existence of parliamentarism in the political system of society only in the case when the parliament, the legislative and representative body, is formed on the basis of competitive struggle between political parties, therefore it is very important to implement actions aimed at holding free, fair and transparent elections (Silander 2023).

The presence of a mature civil society in the country can serve to increase the legitimacy of the parliament, since every parliament is a mirror of its people. In order to stimulate the political participation of citizens, their electoral activity, it is necessary to work to raise their level of political awareness (Lebanidze 2020). It is necessary to contribute to the acquisition of elementary knowledge about politics by citizens, which will reduce the likelihood of the latter becoming victims of manipulation. One of the measures aimed at improving the image of the parliamentary institution in public perceptions could be the tightening of penalties in case of violation of the rules of parliamentary ethics (Börzel and Pamuk 2012).

The electoral system has a great influence on the formation of a quality parliament. The parliament is a representative body and must express the interests of the majority of the people, the main strata and social groups. During the years of post-independence, the electoral code has been amended and improved several times.

However, the problem of imperfection of electoral legislation continues to remain one of the shortcomings of the RA political system. As an example, it can be noted that under the conditions of a simple proportional electoral system, territorial representation has suffered to some extent.

One of the greatest meanings of parliament is control. It is no coincidence that parliamentarism is often identified with responsible governance. The Armenian parliament should strive to make maximum use of its supervisory capabilities as a democratic center of power over other branches of government.

One of the greatest obstacles to the development of parliamentarism in Armenia is the non-existent party system. Although the party system of Armenia resembles pluralism more than multi-partyism, the more parties there are in Armenia, the greater the pressure on the ruling power, which sometimes strives for sole rule. Accordingly, a larger number of parties will have the opportunity to present alternative strategies. Over time, the plurality of parties will make it possible to choose parties of different ideological orientations, ensuring real pluralism. In this case, extra-parliamentary parties will also have certain opportunities to influence the decision-making process. In addition, in the case of a multi-party system, the publicity and accountability of political decision-making can be more effective (Pascariu and Clipca 2025).

The study of the Armenian party system from independence to the present day shows that it is far from perfect. The reasons are different. First, the legacy formed under the conditions of one-party rule prevailing during the Soviet years could not but leave its negative imprint on the further development of the party system. At present, politics is sometimes still based on the inertial tradition of unicentric decision-making. Second, in the absence of historical experience, presidential and semi-presidential systems of government have had a negative impact on the formation of the party system (Raunio and Sedelius 2020).

The development of the party system in the RA has been adversely affected by the so-called 'government parties', known in political science literature, whose parliamentary activities have been more aimed at supporting the government's policies. The latter's policy of monopolizing the political field has created unequal competitive conditions for other parties. As a result, the party elite has become oligarchized, and expressions of party populism have emerged instead of clear concepts. Representative democracy sometimes loses to nomenclature democracy, which is expressed in the rise of the authority of populists, whose speeches are far from being substantive. As a rule, in countries known for their established party system, cases of politicians changing party affiliation are rare. In the RA, numerous examples of renunciation of party membership and conjunctural changes from one party to another can be cited. One reason is that politicians are united not by ideology, but by personal interests or a desire to be closer to the ruling party. Theoretically, political parties claim to adhere to a particular ideology, but in everyday Armenian political life, they are driven by situational interests. An example of the lack of unity based on real ideological grounds is the withdrawal of various major parties, such as the Prosperous Armenia Party, from the active political arena. Furthermore, in a transitional party system oriented toward individuals, the departure of a party leader from politics can lead to the decline of the party. Clearly, in our political culture, individualism is particularly noticeable in an

underdeveloped political elite, where political units are formed and act on the initiative of individuals. This creates a political situation where ideological struggle gives way to a struggle arising from the clash of personal and group interests (Paturyan and Gevorgyan 2021). This negative phenomenon also impacts the activities of parliamentary factions and the political majority. The formation of numerous political parties is based not so much on the imperatives of satisfying national interests, but on the narrow group interests and ambitions of party leaders.

This is precisely why I have the feeling that Armenia's political system is dominated by elite groups backed by big business, and the legislature is gradually turning into a venue for representing oligarchic, rather than economic, interests. In my opinion, this is one of the reasons why political parties lack real party strategies and their ideological ambiguities. This tendency significantly hinders the consolidation of Armenian society, social groups, and the organization of civil societies. In April 2017, the final report of the OSCE Office for Democratic Institutions and Human Rights (ODIHR) election observation mission published it was noted that party campaigns were more focused on individual candidates than on party programs and policies⁹.

Parliamentary elections play the role of a unique indicator of developed parliamentarism and party stability in any country. Dozens of parties have participated in the eight parliamentary elections held in the RA since independence. Many of them, having failed to achieve success, have been completely expelled from the political field. There have been cases when parties secured a respectable presence as a result of the elections, but subsequently disappeared from political life after failing to enter parliament. Under the conditions of independence, in 1995, according to the results of the elections to the National Assembly of the RA of the first convocation, for example, the "Shamiram" party was in second place, which did not even enter parliament in 1999. The series of such examples can be continued. As a result, parties have never been able to strengthen and become traditional. The latter imagine their political activities mainly in parliament, and outside of it they forget about the representation of politics and public interests. In addition, the parliamentary elections held in the RA, unlike the presidential elections, were not distinguished by a high degree of competitiveness and citizen participation. Meanwhile, modern democracy is based on party competition. Before the transition to a parliamentary system of government, as a rule, the political force that enjoyed the president's trust and patronage won. Now, when the only national elections constitutionally are parliamentary elections, on the one hand, the level of responsibility of parties has increased, and on the other hand, citizens are also obliged to familiarize themselves with their programs.

Intra-Party Democracy: Against or for Leadership and Group Interests

Ensuring intra-party democracy is an important issue, as is why party leaders and groups are often reluctant to implement mechanisms of responsibility, accountability, and self-control. In this context, it is noticeable that many political party members unquestioningly follow the orders of the party leader, sometimes even neglecting the

⁹ OSCE/ODIHR. 2017. "Armenia, Parliamentary Elections, 2 April 2017: Final Report." July 10, 2017. Accessed November 10, 2025. <https://odihr.osce.org/sites/default/files/f/documents/6/7/328226.pdf>.

critical voice so essential to parliamentarism. The absence or weakness of intra-party democracy, coupled with the principle of a stable majority, can create opportunities for central government figures to become uncontrollable. To avoid such a scenario, political parties:

- must be guided by democratic principles,
- allow party members to express their views freely,
- create conditions for the involvement of all party members in the decision-making process,
- demonstrate a tolerant attitude toward dissent,
- recruit active members and dedicated party leaders.

Among the problems associated with Armenia's underdeveloped party system is the fact that parties, as crucial elements of the political system, enjoy low legitimacy in the public's perception. One reason is the presence of pseudo-opposition parties sponsored by the government, which has led to a decline in public trust in political parties. Beyond the leader's image, party members play a crucial role in enhancing a party's authority, as they should represent not private but public interests. It's no coincidence that, since Aristotle, good forms of government are those in which those in power pursue interests aimed at the common good, while in bad forms, they pursue personal interests. It's crucial that Armenian society perceive political parties not as associations serving narrow group interests, but as important political structures capable of addressing public policy issues. In the context of the democratization of Armenia's political system, improving the constitutional and legal mechanisms¹⁰ governing political parties is an insufficient but necessary condition. Following the Velvet Revolution, seven amendments were passed that pursued a number of key goals, including:

- encouraging a multi-party system and ideological pluralism,
- increasing transparency, openness, and accountability in party financing, improving public oversight tools over party finances,
- reducing corruption risks,
- separating political activity from business, reducing the influence of private interests on party activities, etc.

Regarding the revision of the party financing mechanism, in order to make party financing more transparent and balanced, and to prevent the circulation of funds of unknown origin in politics, we prohibit businesses, essentially legal entities, from financing parties in any way (Feldman and Alibašić 2019). From the perspective of ensuring financial transparency, it is important to make donations and membership fees, as well as any other monetary payments, in kind. It should be noted that the Constitutional Law on Parties coordinates their activities in Armenia and their participation in elections, but cannot change their political affiliation. This is why party legislation is a decisive factor in the development of a multi-party system.

Thus, the party system of the RA needs modernization. It is stable, but Armenian parties are still weak and do not have a clear social and ideological basis. Parliamentary parties are perceived by society as non-independent forces dependent on the executive

¹⁰ Constitutional Law of the RA on Political Parties. Adopted on December 16, 2016 (with amendments and additions). Accessed November 10, 2025. <https://www.arlis.am/hy/acts/110534> (in Armenian).

branch, and extra-parliamentary parties do not have sufficient resources and public support to influence state policy. As a result, political competition suffers, and problems arise with personnel, as well as with ensuring feedback between the party and the society. In order to avoid such dangerous phenomena that threaten the development of the party system, it is necessary to implement deep and consistent, rather than cosmetic, steps aimed at its modernization (Feldman and Alibašić 2019; Pascariu and Clipca 2025). Parties should become the central actors of political debates, developers of the country's development programs. They should be the most important bodies for training political personnel. The most important prerequisite for the maturity of any political system is a multi-party system with the presence of responsible politicians, who are activated not during elections, but put forward long-term goals and alternative paths for the development of the state. Parties should take on the burden of political socialization of members of society. They are the political formations with the greatest potential to act as a bridge between society and the state, therefore it is necessary to develop new mechanisms ensuring mutual communication between parties and citizens (Djankov 2021). The more qualitative the modernization of political parties, the more successful the political modernization of the state will be. Parliamentary governance is party governance, therefore, the more organized the parties are, the more successful the governance within that system will be.

In summary, the modernization of political parties is closely related to the broad transformation of society: the institutionalization of the political system, the improvement of the electoral system and the constitution, value-normative, socio-cultural and other factors, changes aimed at improving the governance system and political regime. Accordingly, the parliament in the RA is established in terms of form and institutionalization, rich traditions and experience have been accumulated in a short period of time, but there are many problems that require solutions in terms of content. Parliamentarism in the RA still has a certain way to go in development.

Conclusion and discussion

The strengthening of parliamentarism and the public authority system in Armenia, and their relationship, are being realized in the complex context of democratization and European integration. For Armenia's political elite, it is important that the Armenian experience of parliamentarism and democratization has its own mechanism for implementing the principle of separation of powers. Differences between modern forms of government are revealed by comparing the relationships between the highest state organs. In constitutional and legal practice, the organization of public authority is reduced to an unusual model depending not only on the form of government but also on the complex conflict situation and post-war consequences.

The relationship between the executive and legislative branches of government is one of the fundamental characteristics of Armenia's political regime. In a democracy, this represents a certain balance of power; in an authoritarian regime, the power of the executive branch is significantly strengthened by encroaching on the prerogatives of the legislative branch, while totalitarianism implies depriving parliament of its true independence and turning it into a body strictly controlled by the executive organs of state. Key trends in the development of state authority in the modern world. A number

of the most characteristic tendencies have been identified in the scientific literature. In socio-political terms, tendencies toward totalitarianism and democratization can be identified. In terms of the specific methods for achieving unity, tendencies toward concentration and centralization of state power, as well as toward its deconcentration and decentralization, can be identified. It should be noted that these tendencies manifest themselves in various combinations and sequences and alternate under the influence of various factors.

The degree of centralization of public power in Armenian society depends on the level of economic development; the democratic qualities of political leaders and public decisions; legal consciousness and legal culture; as well as the specific content of the tasks that the political majority addresses in a particular period of its development. Therefore, in the history of the Armenian nation, one can find both periods of high concentration of power and periods of its sharp deconcentration, even to the point of complete disorganization.

It is extremely important to understand the reasons for such sharp fluctuations in the state of public power, which are equally dangerous for any society. To determine the specific content of power during such periods in order to create the necessary database for forecasting the state of power and determining its objective models and parameters adequate to the given state of society and the state, taking into account the diversity of types of public authority and the importance of ensuring their harmonious interaction. The need for decentralization of public authority is dictated by the importance of aligning the mechanisms for satisfying people's needs and interests with the conditions under which they are formed. Thus, the general significance of decentralization of public authority boils down to the problem of constructing a system of political authority more adequate to a developed state, one in which human rights and freedoms in all their manifestations, their strengthening and implementation, determine the internal organization, meaning, and content of its activities, taking into account the growing trend toward expanding the spectrum of human rights and freedoms, specific differentiation, enrichment of their content, a commensurate growth in human needs, and a qualitative differentiation of people's interests, which are recognized and enshrined in the form of special human rights. If a highly centralized government in any state, as a rule, remains irresponsible, then decentralization of power makes sense only when the government, as a result, ceases to be irresponsible, thereby using every opportunity to responsibly achieve a socially useful result.

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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 RATIONAL-FUNCTIONALIST APPROACH TO ANALYZING COOPERATION WITHIN THE BRICS FRAMEWORK: MULTIPOLARITY OF INTERNATIONAL RELATIONS AND ASSESSMENT OF ITS POSSIBILITIES

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Abstract

This article analyzes the approaches of rationalism and functionalism to assess the dynamics of cooperation between countries within the BRICS. Such an approach shows that states, as rational actors, enter into cooperation when they see tangible benefits from collective action, in particular, in satisfying common utility needs. Studying the BRICS system from the perspective of this approach requires an assessment of specific practical areas of cooperation, such as economic development, financial stability, and public health. In addition, this requires examining the extent to which the institutional mechanisms within the BRICS system sufficiently contribute to the achievement of common goals. However, in general, the rationalist perspective may not take into account the influence of ideological factors, power asymmetries, and domestic political considerations that shape the landscape of cooperation. Comparative analysis requires recognizing the obstacles of rationalism and functionalism in modern international relations. While the pursuit of mutual benefit is a powerful incentive for cooperation, it is necessary to assess the different levels of commitment and obstacles among the BRICS member states. Thus, this article is devoted to the proponents of calibrated utility rational functionalism, supplemented by ideas from constructivist and neorealist theories to provide a more comprehensive understanding of the complexities inherent in BRICS cooperation. This multifaceted approach allows for a more accurate assessment of the viability and limitations of BRICS interstate cooperation.

Keywords: *international relations, functionalism, rationalism, interdependence, BRICS, ideological factors, global governance, multipolarity.*

Introduction

The BRICS group came together when the world was going through big changes and countries were shifting their power around. This group shows a wish among countries to build teamwork outside the usual Western-led systems. BRICS aims to offer

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different choices to places like the IMF and World Bank, which often miss the mark when it comes to what developing countries really need. Since the 2000s, these countries have stepped up as key players in the world economy, significantly contributing to production, trade, and investments abroad. China's contribution has really helped the group come across as more serious.

As the BRICS becomes more organized, economic and strategic issues are increasingly linked. This can be seen in the creation of groups like the New Development Bank (NDB), which wants to fund projects and encourage sustainable growth by using different ways of funding than the usual ones (Duggan, Ladines Azalia and Rewizorski 2021). The group is also talking more about things like technology, new ideas, and safety because of worries about energy and changes in factories. In their words, the leaders of the BRICS countries, specifically China's President Xi Jinping in recent meetings, keep announcing they prefer to make their team improved and work together to create a shared future.

This shows that the members are always trying to stick together, even when things are uncertain in the world. They are also changing how they work together to fit their own differences and how their economies are growing. So, even though the BRICS countries are working together in a world where there is competition and rivalry, their cooperation is based on shared money-making goals and political hopes for the future.

The fact that the BRICS members are so different makes it hard to use standard ways of studying their cooperation. Their differences in power, how developed their economies are, and what they want to achieve politically make people wonder if they can really work together without having similar interests. But, by focusing on the practical rewards of cooperation, we can see how these different countries keep their group active. This way of thinking says that countries work together when they find it benefits them, like with the New Development Bank and the Partner Innovation Center. These initiatives bring people together over shared goals, even if they don't all see eye to eye on politics.

To actually get a grasp of this teamwork, we've got to take a look at the authentic papers, what the companies are saying, and research on real initiatives. What human beings like Xi Jinping say indicates a common center of attention on what is practical. Looking at tasks like the Partnership initiative shows how working collectively can lead to real results even when there are deep-seated differences. This research also looks at how the BRICS nations interact with different nations, like their efforts with Laos, displaying their role in a world with multiple electricity facilities. Critical analyses of the electricity dynamics and problems within the BRICS crew add depth to the research. This team faces challenges like contention and unfairness; however, it is additionally looking for methods to build enhanced connections. So, through mixing up the legitimate stats with some imperative takes, we can get the full scoop on what's going on inside the BRICS crew and the challenges they're facing (Bastanifar, Khan and Koch 2025).

Theoretical foundations of rational-functionalism in the context of international relations

Rational-functionalism, in the field of international relations, is characterized by a set of fundamental principles that lay the foundations for a pragmatic understanding of cooperation between states within heterogeneous groups such as the BRICS framework. It is above all a theoretical paradigm that goes beyond purely idealistic or constructivist approaches by insisting on the utilitarian function of interactions and the instrumental rationality of the actors who compose them. This orientation favors the analysis of the concrete mechanisms by which states with disparate profiles manage to establish and maintain stable cooperation, despite manifest differences in political weight, economic capacities, or strategic interests.

The first key principle lies in the explicit recognition of the heterogeneity of the members as an inescapable structural datum. Rather than seeking to homogenize interests or identities, rational-functionalism postulates that cooperation is organized around a functional diversification, where each actor mobilizes his specific assets to meet shared needs at a sectoral or thematic level. This functional division of labor thus allows the creation of pragmatic synergies, in which asymmetries are not perceived solely as obstacles but become levers of complementary interdependence. The concrete examples observed within the BRICS, such as the industrial initiatives of the Partner Innovation Center, illustrate this approach where productive complementarity prevails over direct competition (MFA of the RF 2025). This approach transcends traditional antagonisms and transforms the initial disparity into a potential source of increased cooperation.

Secondly, instrumental rationality constitutes a central analytical foundation. Each member state, driven by a realistic desire to optimize relative gains, adopts behaviors oriented by the search for specific sectoral interests rather than by ideological or normative adherence to a common global vision. Rational-functionalism considers that this calculating rationality does not necessarily imply a constant conflict but can generate pragmatic arrangements, in particular through sectoral compromises or compensation mechanisms. The flexibility associated with this rationality makes it possible to manage tensions of interests and internal imbalances while maintaining a dynamic of cooperation. Thus, the current institutional discourses valuing “solidarity” within the BRICS above all translate into a pragmatic pact aimed at ensuring the functional viability of the group in a competitive international context (Men 2025).

The pragmatic recognition of power asymmetries and strategic divergences is an essential corollary. Rational-functionalism does not create the illusion of perfect equality between states, but on the contrary analyzes the way in which these asymmetries are institutionalized and managed through concerted arrangements or decentralized governance mechanisms. The resulting fragile balance is not fixed but is based on a constant functional negotiation between compromises and adjustments, thus perpetuating the sustainability of the partnership. This principle underlines the non-ideological but deeply tactical character of rational-functionalism in its ability to integrate the political reality of power relations in the service of a cooperative purpose.

In the continuity of the rigorous methodology already developed, which insists on the fine empirical analysis of discourses, institutions, and external interactions, these

key principles therefore form the basis for a coherent reading of cooperation within the BRICS. They show that the new theoretical framework is not limited to a static interpretation but highlights functional plasticity, practical instrumental rationality, and pragmatic management of asymmetries, all elements that contribute to explaining the persistence of the group despite its intrinsic diversity. In this way, rational-functionalism reveals that international cooperation, far from being simply the expression of identical interests, is built on the contrary by the skillful articulation of assumed differences and negotiated functional complementarities.

The analysis of cost-benefit calculations occupies a central place in the rational-functionalist understanding of cooperation between states, especially within a set as heterogeneous as the BRICS. In this context, each actor considers cooperation not as an end in itself, but as a means of instrumental optimization of his own interests, by careful arbitration between the expected benefits and the costs incurred. This rational calculation is based on a pragmatic assessment of the relative gains, which encompass both direct economic benefits (access to markets, capital, and technologies) and geopolitical benefits (strengthening of international stature and increased weight in global negotiations). Membership of the BRICS Group is therefore justified by the desire to maximize these sectoral benefits while mitigating the risks inherent in multilateral commitments, especially in a context of marked asymmetries and potential rivalries.

The dynamics of cooperation, in this perspective, emerge from a series of arbitrations where the member states evaluate the “opportunity costs” linked to their participation. For example, the commitment to initiatives such as the Partner Innovation Center reflects a collective desire to invest in industrial technological projects with high added value, the return on which is anticipated to be greater than the related sacrifices (sharing of sensitive data, punctual diplomatic concessions) (Stuenkel 2020). This logic explains why the BRICS often favor gradual sectoral cooperation, making it possible to narrow down commitments and guarantee sufficient flexibility in the face of changes in national or international contexts. This functional modularity, already mentioned, is thus also a way of limiting potential costs while capturing mutual contributions, thus optimizing the cost/benefit ratio for each member.

Another fundamental part of these calculations is based on the pragmatic management of asymmetries within the group. The most powerful states, such as China or Russia, can impose a certain agenda, but they also have an interest in maintaining cohesion by taking into account the capacities and expectations of less influential members. Therefore, the sharing of the costs of cooperation is calibrated in such a way as to preserve the functional balance, avoiding that states perceive their contribution as disproportionate to their expected gains. The interest of the whole in maintaining a credible coalition on the international scene thus encourages compensatory mechanisms and negotiated flexibilities, which moderate potential friction. This logic of balance by compromise ensures that the cost of a possible exclusion or disengagement is perceived as higher than that of cooperation, strengthening the stability of the group. In this sense, rivalry between states often gives way to strategic interdependence, produced from a pragmatic reading of mutual benefits.

Moreover, cost-benefit calculations transcend the internal framework of the BRICS to include interactions with other regional or international groups. The growing interest of countries such as Laos in interconnected partnerships with the BRICS via the AEU or the SCO illustrates this extension of the opportunities perceived by the Member States themselves, which benefit from an expanded network of functional cooperation (Hooijmaaijers 2021; Ayodele 2025). The international network thus diversifies and enriches the portfolio of possible gains while spreading the risks, in accordance with a rational approach to managing externalities arising from international relations. The pragmatic policy of openness, far from being a simple diplomatic display, responds to a calculated strategy of expanding tangible benefits in a global environment undergoing reconstruction.

The study of rational-functionalism applied to the BRICS cannot do without a thorough analysis of the institutional functions and cooperation mechanisms that structure this heterogeneous set. Indeed, the sustainability of cooperation, no matter the range of pastimes and the inequalities of power, relies mostly on the group's capability to institute frameworks and approaches that transcend the simple addition of individual countrywide interests, framing the relational complexity in a secure and evolving practical order.

First, the institutions within the BRICS play a central role in the formalization and law of interactions. Unlike conventional international organizations, often endowed with a binding legal architecture, the BRICS relies on a flexible but nevertheless robust institutional model, where the procedural arrangements define the rules of the cooperative game without threatening the sovereignty of the Member States. This flexibility embodies a form of "light institutionalization," which corresponds to the rationalist-functionalist logic: States adhere to mechanisms capable of maximizing their guaranteed minimum benefits while keeping room for maneuver to adjust to changing national contexts. For example, the multiplication of annual summits, thematic working groups, and ad hoc mechanisms promotes continuous monitoring and coherence of sectoral projects, reducing the uncertainties inherent in multilateral engagement (Zhou 2025; Papa and Han 2025). However, the rational-functionalist theory, though nice in illuminating sure factors of cooperation within the BRICS, cannot ignore intrinsic limits and internal criticisms that temper its explanatory power. These criticisms are all the more important because they highlight the conceptual and empirical tensions inherent in this approach, especially when it comes to accounting for the complex dynamics of a heterogeneous group where antagonisms of interests, asymmetries of power, and cultural divergences combine.

A first major limitation lies in the tendency of rational-functionalism to favor a functionalist and quasi-optimizing vision of interactions between states. This perspective assumes that the BRICS members act mainly according to an instrumental logic, seeking to maximize their mutual benefits or minimize their commitment costs by setting up appropriate institutional mechanisms. However, this hypothesis tries to grasp all the political, identity, and strategic factors that weigh in the choices of states. For example, Afro-Indian rivalries or Russian geopolitical concerns towards the West cannot easily be reduced to a simple functional rationality. These tensions reflect calculations that often go beyond the strictly functional sphere to integrate

considerations of power, prestige, or national security, often opposed to the idea of mutually advantageous and stable cooperation. Thus, rational-functionalism tends to underestimate the depth of latent conflicts and their potential to disrupt cooperative arrangements (Naik 2025).

Secondly, the institutional flexibility so praised in the structuring of the BRICS can paradoxically be a source of weaknesses, which goes against the current of the rationalist-functionalist conception valuing progressive stability. The absence of binding legal mechanisms and the adoption of a “light institutionalization” certainly favor the membership of the members but also expose the group to a lack of effectiveness. The voluntary and informal nature of the agreements makes their implementation dependent on the changing political wishes of the members, which generates structural fragility in the face of disappointments or differences of objectives. For example, the deadlines and resolutions of the summits are often adopted under the sign of minimal consensus, but their concrete translation into coordinated policies often remains limited. This institutional fluidity thus questions the ability of the BRICS to go beyond declarative cooperation to establish a truly integrated system, where the pooling of risks and gains would be highly restrictive and sustainable (Rodrigues Vieira 2025).

Operationalization of the rational-functionalist approach for the BRICS

The fine understanding of the national interests of the BRICS members constitutes an essential prerequisite for the operationalization of a rational-functionalist approach, which aims to explain the dynamics of cooperation within the group. Indeed, the socio-economic, political, and strategic diversity of the countries concerned—Brazil, Russia, India, China, and South Africa—necessarily leads to a heterogeneity of expectations, priorities, and constraints that each state seeks to defend or promote. This plurality justifies first carrying out a rigorous identification of these interests before proposing a prioritization of them in order to grasp the adjustment and compromise mechanisms that underlie collective stability despite the disputes.

It would be reductive to consider that the interests of the BRICS members converge naturally or align around homogeneous functional objectives. On the contrary, this perspective forces a differentiated analysis of the specific motivations that condition the commitment of each actor. China, in particular, is asserting itself as the economic and financial engine of the group, seeking to strengthen its commercial relations and its foreign direct investments within the BRICS itself, emphasizing a priority interest in the development of an internal synergy conducive to growth. This orientation illustrates well the progressive integration of functional objectives into the cooperative dynamic, where utilitarian rationality triggers the creation of institutions and devices promoting intra-BRICS trade and investment (Chen 2025). However, this economic interest cannot be dissociated from Chinese geopolitical ambitions, which also wish to establish a regional and global leadership competitive vis-à-vis the Western powers.

At the same time, Russia highlights strategic concerns related to security and the reconfiguration of international balances, in particular in the face of perceived hostility from the West. This priority partly explains the country's ambivalent stance towards regionalism and functional cooperation, which can waver depending on geopolitical

conflicts, as illustrated by the recent war in Ukraine and its repercussions on intra-BRICS relations (Cochrane and Zaidan 2024). Russian pragmatism is expressed more by a political use of the group's institutions, combining minimal cooperation and the instrumentalization of mechanisms to strengthen its position on the international scene. Thus, its national interests relate less to a strictly functionalist logic than to a strategic dynamic, where the consideration of power relations predominates.

Brazil and South Africa, extra peripheral but strategically essential members, are specifically interested in the promotion of national socio-economic development and the affirmation of their respective roles in their regions. Brazil, which in the beginning contributed to the advent of the group, aims to give a boost to its affective capacities inside the global South, benefiting from accelerated economic cooperation whilst preserving its political autonomy. As for South Africa, it often insists on the need to integrate African regional issues within the BRICS agendas, advocating cooperation that goes beyond simple economic logic to include stability and development (de Carvalho, Anand and Naidu 2025). This highlights a plurality of horizons of expectations that transcend the functionalist sphere, including political, identity, and normative objectives. Moreover, the recently announced arrival of Argentina within the group illustrates a renewal of national interests likely to redefine the internal dynamics. This accession is motivated by the desire to enhance Argentina's place in the international order while seeking to diversify its economic partnerships in a context of prolonged internal crisis (Duggan, Hooijmaaijers, Rewizorski and Arapova 2021). This extension of the club testifies to the growing attractiveness of the BRICS but also to the complexity of the interests that the group will have to arbitrate to maintain sufficient cohesion.

The prioritization of these interests reveals a constant tension between, on the one hand, pressing national emergencies such as security, economic development, or internal political legitimacy and, on the other hand, more global collective objectives, such as the reform of global governance or the promotion of a multipolar order. This unstable coexistence often translates into a search for pragmatic compromises based on precarious balances, rather than on deep convergences. The rotation of the BRICS presidency, the flexibility of the agreements, and the modesty of the concrete commitments reflect this priority given to the management of differences, where each member tolerates a certain level of contradictions to preserve a space of interaction likely to generate partial mutual benefits (Ayodele 2025).

In contrast, South Africa is at one extreme of the power spectrum. Despite its symbolic status as an African leader and its political assets, its economic capabilities remain limited on a global scale, as does its relative diplomatic influence. This reality makes it a more dependent player, seeking to benefit from BRICS membership for knowledge, investment, and development cooperation, characterized by a significant military arsenal and substantial diplomatic potential, but based on a more fragile economy and reliance on energy exports. The current geopolitical conjuncture, in particular the impact of the war in Ukraine, accentuates Russian fragilities but also underlines the role of Moscow as a major strategic actor confronted with Western hostility (Nach and Ncwadi 2024). This duality manifests itself in a posture where Russia uses the BRICS as a lever to circumvent sanctions and strengthen its alternative

alliances while adopting a pragmatic approach to the institutionalization of cooperation. Thus, its power manifests itself more in the security and diplomatic field than in a strictly economic influence, illustrating that power asymmetries are not limited only to the material dimension but also affect the political and symbolic spheres.

Taking into account these structural asymmetries therefore invites us to go beyond a purely functionalist vision limited only to cooperation of mutual interest: relations within the BRICS are marked by a dialectic where relative power conditions the definition of priorities and modes of integration. Economic, military, and diplomatic capacities contribute to shaping implicit power relations, which direct interactions and possible concessions. This joins the criticisms addressed to the rational-functionalist approach, which, if it values the utilitarian logic and the progressive construction of cooperative blocks through functional interdependence, cannot obscure the factors of inequalities and the stakes of domination likely to hinder the sustainability of these processes.

Understanding the functional coordination mechanisms within the BRICS requires a thorough analysis of the institutional bodies and procedures that underlie the cooperative dynamics of the group. These mechanisms cannot be understood independently of the asymmetrical configuration of the powers, presented previously, which conditions both the modes of interaction and the formal devices put in place to organize cooperation. They thus embody the functional pillar through which the rational-functionalist approach manifests itself concretely, reflecting the pragmatic will of the Member States to overcome their differences by building spaces for consultation and collective action.

The BRICS rely on a series of institutional bodies with flexible but progressive functioning, corresponding to a moderate level of institutionalization, typical of emerging formations seeking to reconcile diversity and effectiveness. The annual summit of the heads of state and government, the supreme decision-making body, embodies the common political will and sets the main strategic orientations. However, this forum, by its small format and the consensual nature of its deliberations, reflects the complexity inherent in the management of a group with sometimes divergent interests and heightened sensitivity to national sovereignty. Unlike a formal organization with binding powers, the rotating presidency of the BRICS, assigned annually to each of the members, acts as a symbolic and practical lever of coordination, allowing each country to put forward its priorities while ensuring a temporary balance of influences (Wang, Zhang and Xi 2022). This rotation illustrates the need for leadership management by consensus, essential in a context marked by marked structural asymmetries.

Beyond the summit, a dense network of working groups and technical committees oversees specific cooperation in essential functional areas: economy, finance, trade, energy, security, sustainable development, and innovation. These operational spaces reflect the rationalist approach oriented towards the pragmatic resolution of common problems by promoting regular exchanges between experts and senior officials. They make it possible to capitalize on economic and technological complementarities—for example, financial cooperation is realized via institutions such as the New

Development Bank, a real shared institutional vector that illustrates the group's ability to create joint tools beyond simple political consultations. This institutional development, progressive but tangible, reflects a pragmatic adoption of functional procedures, which favor the creation of increasing interdependencies, a central pillar of rational-functionalist reasoning (Cheng 2015).

The consensual nature of the decision-making procedures is also a crucial aspect for understanding the sustainability of cooperation. While the group does not have binding mechanisms in the strict sense, decisions are taken unanimously, thus imposing a climate of mutual listening and compromise. This procedural model avoids polarization and prevents blockages linked to differences in national interests while preserving the sovereignty of the members. However, this procedural flexibility is also a potential limit, insofar as it can slow down decision-making and require strong internal diplomacy, particularly in light of the power imbalances outlined above. The ability to maintain an open dialogue and negotiate compromises between actors with asymmetric resources, such as China or Russia on the one hand, and members with narrower margins, such as South Africa, conditions the effectiveness and cohesion of the group (Belli and Jiang 2025).

Taking into account regional and cultural diversity appears to be an essential dimension to fully grasp the dynamics of cooperation within the BRICS, especially in light of the functional coordination mechanisms previously analyzed. This diversity, although it represents a potential source of tension, is also an essential vector for mutual enrichment and legitimization of cooperation, especially in a context where the differences in historical trajectories, development models, and identity representations are profound. The cultural and geographical complexity of the BRICS, which brings together countries from different continents—Asia, Africa, Latin America, and Eurasia—implies a multiplicity of worldviews, political priorities, and modes of diplomatic interaction that cannot be ignored if we want to understand the sustainability of the group.

From a rationalist-functionalist point of view, this regional and cultural heterogeneity is not simply an obstacle to cooperation but constitutes a framework of constraints and opportunities that forces us to think about specific modes of coordination and adaptation. The explicit recognition of these differences, for example during annual summits or within working groups, allows not only the integration of diverse perspectives but also the stabilization of the whole by mitigating the risks of exclusion or cultural domination. Thus, the rotation of leadership within the group, mentioned above, does not only respond to a political logic of balance of power but also reflects a form of symbolic expression of regional and cultural diversities, giving each of the members a privileged moment to highlight their own issues and frames of reference (Mansour and Baiche 2025). This contributes to a dynamic of inclusion not only politically but also epistemologically, where each country can assert its identity in cooperation without being overwhelmed by a single hegemonic model.

Cultural diversity significantly influences the methods of communication and negotiation between members. BRICS diplomacy is characterized by a high degree of pragmatism and a preference for consensus, which can be interpreted as a functional adaptation to the coexistence of normative systems and distinct political approaches.

For example, the differences in diplomatic style between China, a centralized and hierarchical great power, and South Africa, which follows a multi-stakeholder tradition involving strong internal consultations, require continuous adjustments to avoid misunderstandings and foster an atmosphere of relative trust (Biba 2016). In this sense, the ability of the BRICS institutions to create a flexible framework, as shown by the technical consultation bodies and informal exchanges, makes it possible to translate these differences into resources rather than open conflicts.

The regional dimension also represents a key variable in the dynamics of cooperation. The integration of the BRICS within their respective geopolitical spaces influences their national strategies and their conception of international cooperation. M. Telo highlights how Russia, faced with significant geopolitical tensions in its immediate region, adopts an ambivalent posture vis-à-vis regionalism in connection with its BRICS partners, oscillating between pragmatic cooperation and power strategy (Macías 2025). This regional complexity is also found in the case of Argentina, which, by joining the BRICS, seeks to strengthen its regional position in Latin America while inserting its particular interests into a broader global architecture. The partnership between members from such varied regional backgrounds imposes on the BRICS a delicate balance between intrastate regional cooperation, where trust and interests are sometimes more homogeneous, and interregional cooperation, where the search for compromises and the recognition of pluralism dominate.

In this regard, the leading role of China illustrates well this dialectic between diversity and functional pragmatism. By its increasing economic weight, it exerts a decisive influence on commercial exchanges and intra-BRICS investment flows, while promoting initiatives that respect national singularities to create a network of effective interdependencies (Süsler 2025). This posture underlines the importance of a fine-grained approach, sensitive to local contexts, which complements the purely functional logic of cooperative mechanisms. The ability of the BRICS to adapt to the cultural and regional specificities of their members by avoiding in particular the temptations of normative or institutional standardization is therefore essential to maintain a balance between necessary convergence and respect for the constituent diversity of the group.

Analysis of the emergence and sustainability of cooperation within the BRICS

The emergence of an initial convergence of economic and geostrategic interests within the BRICS can be understood as the *sine qua non* condition that allowed the crystallization of cooperation beyond simple intercultural and regional dialogues. This point of convergence, although partial and circumstantial, constitutes a powerful engine explaining, according to a rational-functionalist approach, the activation of a functional framework of cooperation based on the mutual recognition of shared advantages. The manifest heterogeneity of the group, previously analyzed from a cultural and regional perspective, therefore does not neutralize the existence of structuring convergent interests, which, while coexisting with divergences, have favored the implementation of pragmatic and sustainable cooperative mechanisms.

On the economic level, the BRICS first constituted a collective response to the domination of a world order largely impregnated by institutions and regulations perceived as inherited or controlled by the former Western powers. This common

posture reflects a shared strategic interest in reshaping the global economic power relations, in particular through the development of alternative trade channels, the diversification of investment sources, and the promotion of large-scale infrastructure projects. The coordination around so-called “strategic” sectors illustrates this point: each of the members, despite distinct national priorities, embodies a specific sectoral capacity which, integrated into a complementary logic, aims to build an interconnected economic network, thus mitigating their individual vulnerability to external shocks and potential economic sanctions (Esteves and Coelho 2025). This growing economic interdependence feeds a rational calculation by which the member states perceive a tangible benefit linked to cooperation, which proves to be an essential vector of sustainability.

On a geostrategic register, the initial convergence is captured in the shared desire to assert an increased strategic weight in global governance. This is not a formal coalition aimed at challenging an established order head-on, but rather a cautious pragmatic assembly that seeks to create new balances, especially in a context of global and multipolar tensions. The ambition of the BRICS is not only economic; it is also reflected in a diplomatic posture aimed at enrolling their interests in renewed multilateral forums through a more representative and less hegemonic global economic governance. This pragmatic will is expressed in initiatives such as the New Development Bank (NDB) or the BRICS Cooperation Alliance, where ideal instruments are embodied to translate functional convergences into concrete actions. These devices are designed to meet both economic development challenges and geopolitical needs, allowing members to secure their national projects in a logic of structured interdependence (Müller 2025).

It should be emphasized that this initial convergence is also based on a rational reading of the mutual benefits and the costs associated with too marked a divergence. Thus, even if the strategic interests remain partially divergent, in particular due to regional rivalries or national hegemonic aspirations, the effectiveness of functional cooperation requires the pragmatic recognition that the refusal to engage in direct confrontation offers a framework for peaceful interactions, favoring economic and diplomatic cooperation. This dialectic of cooperation and competition, often described as “unlikely but necessary cooperation” in a context of increasing economic interdependencies, reflects a complex reality where instrumental rationality encourages overcoming tensions to take advantage of common opportunities (Omoigberale 2025).

The need to resort to ad hoc institutions within the BRICS is part of the logical continuity of the initial convergence of economic and geostrategic interests, which, although essential, is not enough by itself to guarantee the sustainability and stability of cooperation. Indeed, faced with the profound heterogeneity of the group's members, whether related to their economic capabilities, their geopolitical profiles, or their national priorities, cooperation encounters inherent frictions, in particular in terms of transaction costs. The latter, understood as all the costs related to the search for information, negotiation, coordination, and implementation of agreements, can compromise the effectiveness and sustainability of cooperative mechanisms. To mitigate these obstacles, the BRICS have gradually set up specific institutions, often

created *ex nihilo*, which act as structuring devices aimed at reducing these costs, channeling interactions, and establishing a formal facilitating framework.

This institutional strategy, which can be analyzed from a rationalist-functionalist perspective, thus responds to a pragmatic logic: the members agree to delegate part of their sovereignty over specific functional spaces in order to maximize joint gains and minimize transactional uncertainties. Here, the emergence of *ad hoc* institutions does not constitute a simple administrative instrument but a *sine qua non* condition allowing the dialectical tension between divergent interests and collective cooperation. A paradigmatic example of this is the creation of the New Development Bank (NDB), whose establishment reflects the desire to establish a credible financing mechanism oriented towards infrastructure projects, where traditional multilateral banks could prove slow or politically biased. The NDB, by offering an explicit institutional framework, reduces the uncertainties related to the identification of reliable partners, the assessment of risks, and the management of shared financial commitments (Wang and Mishra 2025; Larionova and Shelepov 2019).

The central challenge for the sustainability of cooperation within the BRICS lies in the management of the power asymmetries that characterize this heterogeneous group, as well as in the effective sharing of the benefits resulting from cooperation. These disparities, both economic and political, initiate a delicate process where the balance between influence and distribution of resources conditions the sustainability of the partnership. It is therefore crucial to understand how the members, unequal in terms of global weight and capabilities, manage to develop a *modus vivendi* where the coexistence of differentiated interests does not translate into asymmetric domination but into a pragmatic compromise that preserves collective integrity.

The asymmetry between the members is manifested in particular by the marked economic and geopolitical predominance of China, which contrasts with the more modest levels of development of Brazil, South Africa, India, and Russia. This inequality, far from being ignored, is, however, managed by means of a functional logic that favors balancing mechanisms based on economic complementarity and mutual benefits. In doing so, China does not seek so much to impose its hegemony as to structure a system of cooperation in which its power constitutes an incentive, even a lever, to pull the whole towards an upward dynamic. This scheme reflects a form of functionalist rationality where the implicit recognition of power asymmetries does not lead to fragmentation but to a cooperative organization built around shared gains and calibrated according to the respective contributions and expectations.

The New Development Bank illustrates this subtle game of balance as an institution where contributions are proportional to capacities, but the financing is intended for various projects that benefit the members in diversified proportions, taking into account national priorities and development needs. Collective governance is based on a principle of consensus and consultation, which reduces the risk of the imposition of a dominant power, thus favoring a form of collective management that values formal equality despite material inequalities (Nach and Ncwadi 2024). This institutional architecture is part of a functionalist dynamic where pragmatic cooperation alleviates structural tensions and makes it possible to go beyond the traditional logic of power by promoting concrete and shared results.

The sustainability of cooperation within the BRICS cannot be reduced to a simple recognition of power asymmetries or to the pragmatic distribution of benefits. It is also based on the implementation of a variety of mechanisms, formal and informal, intended to prevent, manage, and resolve conflicts inherent in any heterogeneous organization. These mechanisms form an essential framework for articulating the complementarity of divergent interests while avoiding an escalation of tensions that would call into question the integrity of the group.

At the formal level, the BRICS institutional architecture, and in particular the New Development Bank (NBD), constitutes a central mechanism for regulating disputes related to joint projects and shared governance (Sá and Garcia 2025). It operates according to a principle of consensus, which, far from being a simple pragmatism, aims to institute a collective decision-making process where no dominant power can unilaterally impose its agenda. This provision limits the risks of frontal conflicts by incorporating a form of procedural equality, even if the influences remain unequal in practice. These formal tools reflect a functionalist logic where conflict resolution is considered a *sine qua non* condition for the sustainability of cooperation.

However, the effectiveness of these formal mechanisms is often limited by the disparity of national interests and the ideological heterogeneity of the members, which redirects a large part of conflict management to more flexible and informal spaces. Bilateral consultations and regular meetings in various formats (summit, ministerial dialogues, parallel diplomatic exchanges) play a crucial role in this non-institutionalized dimension. The controlled ambiguity and the non-formal constraints specific to relations within the BRICS fuel a climate conducive to the delayed expression of disputes, which can thus be handled outside official procedures, often perceived as cumbersome or rigid. The use of informal mechanisms reflects a diplomatic tradition of balance and subtle negotiation, similar to practices observed in other heterogeneous international groupings and which is based on interpersonal links between political and administrative elites, as well as on a culture of pragmatic dispute management inspired in part by the non-aligned approaches of previous decades (Alden and Schoeman 2025).

This capacity for progressive adaptation is also made possible thanks to the accumulation of a shared experience of conflict management, formalized and informal, which makes it possible both to stabilize internal relations and to feed a common argument in the international arena. The consensual nature of decisions, already mentioned earlier, becomes a dynamic process, not fixed, in which the rules are amended and adapted according to the circumstances. This decision-making flexibility does not call into question the existence of a framework but, on the contrary, guarantees its resilience by avoiding bureaucratic rigidity. Therefore, the institutional structure of the BRICS does not present itself as a fixed straitjacket but as an evolutionary device that combines continuity and innovation in the conduct of the partnership (Siwisa 2020).

Conclusion and discussion

In short, the rational-functionalist approach illuminates with relevance the complexity and sustainability of cooperation within the BRICS, emphasizing the pragmatic logic

that underlies the emergence and consolidation of this grouping as heterogeneous as strategic. Contrary to analyses that could be limited to a strictly normative or ideological reading of internal dynamics, this approach favors an understanding based on the rationality of the collective actors, guided above all by the search for common functional interests and the optimization of mutual benefits, despite the sometimes profound differences between the members.

One of the fundamental contributions of this perspective lies in the conception of cooperation as an evolutionary process backed by a logic of function, where each stage of institutionalization reflects a pragmatic balance between constraints and opportunities. The initial framework of the BRICS, conceived as a simple economic coordination forum, has thus continued to expand and become more complex, not by unilateral ideological voluntarism, but under the combined pressure of the functional requirements imposed by the diversity of interests and by international competition. The adaptability described in the previous subpart is then a concrete illustration of this functional rationality, where the progressive insertion of new thematic fields and the diversification of the methods of engagement reflect a collective strategy designed to maximize the relevance and resilience of the group in the face of internal asymmetries.

This rationality is also expressed in the management of latent conflicts generated by the heterogeneity of the members. Rather than ignoring or repressing tensions, BRICS diplomacy integrates them into a framework where the search for compromises is carried out around specific functions, adapted to each segment or particular issue. This functional segmentation, which can be observed in particular in the areas dedicated to development finance, energy transition, or even strategic raw materials' governance, mitigates centrifugal forces by offering differentiated and negotiated margins for maneuver. Through this organization, cooperation is nourished by a pragmatic rationality that favors operational efficiency over forced homogenization, validating the centralizing idea of functionalism, according to which convergent functional needs are a more powerful engine than divergent political or cultural identities.

Another key explanatory element lies in the cumulative dynamics of interactions. The rational-functional approach highlights the decisive role of the progressive "functional gains" that result from cooperation, consolidating the attachment of the members to the institution and strengthening the positive dynamics of interdependence. This gradual construction of shared interests constitutes an essential stabilizing factor, because it encourages each of the partners to preserve the common framework in order to benefit from the industrial, commercial, and geopolitical synergies that it provides. This logic is reflected in the experience accumulated by the BRICS with mechanisms such as the Partner Innovation Center, which embodies an explicit desire to stimulate global industrial cooperation on concrete technical and economic bases, going beyond simple diplomatic or symbolic ambitions.

Functional rationality extends to the evolution of the international field in which the BRICS are inserted. Far from confining itself to a posture of opposition to the Western order, the group acts in interaction, even in cooperation, with traditional industrial powers, adapting its strategies to the changing configurations of global governance. The recognition of this ability to forge detailed alliances reinforces the thesis that cooperation is not an ideological end in itself but a rational instrument used by actors

with sophisticated strategic calculations. Therefore, the sustainability of the BRICS does not result from a homogeneity of political goals but rather from a collective ability to translate specific economic and political functions into flexible and pragmatic institutional arrangements.

Thus, the rational-functionalist approach makes it possible to understand the emergence and sustainability of the BRICS not as a paradox or an anomaly in international relations, but as the logical product of a complex system where the diversity of interests is regulated by evolutionary, functional, and strategically coordinated mechanisms. This reading decanters the debate from political antagonisms alone towards the recognition of a cooperation based on a dynamic addition of shared functions and benefits, the plasticity of which ensures the viability in a context of marked asymmetries and persistent external pressures. It thus invites us to rethink the very notion of a multipolar international order by considering it as a network of cooperating entities whose survival depends on their ability to articulate plural interests in adaptable functional frameworks, rather than on a rigid identity basis.

The analysis of emerging cooperation within the BRICS, while revealing the rationalist-functionalist dynamics specific to this heterogeneous group, naturally invites us to question the transferability of this approach to other sets of emerging powers. This comparative reflection is part of a relevant extension of the limits and avenues mentioned above, since it not only makes it possible to put the results obtained into perspective but also to identify the structural and contextual conditions that favor or hinder the sustainability of multipolar cooperations in a world undergoing reconstruction.

On the other hand, emerging intergroup relations can offer a complementary laboratory to test the robustness of the rational-functionalist approach, in particular through hybrid cooperation formats such as BRICS+ or other strategic partnership initiatives upstream of formal institutionalization. These configurations capture a form of “network cooperation” where the flexibility of the actors and the multiplicity of platforms favor adaptive arrangements, following a logic of optimization of one-off advantages rather than rigid institutionalization. This dynamic is likely to reflect a contemporary trend towards asymmetric multipolarity, where cooperation is built not necessarily by seeking to establish a strong common identity or shared normative norms, but by concordant pragmatic calculations. The interest of a perspective such as this is to broaden the understanding of emerging cooperation beyond the classical frameworks by integrating the processes of decentralized, disseminated, and often fragmented international governance.

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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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THE POLITICAL HYBRIDIZATION OF MIDDLE EASTERN STATES: IRAQ AS A CASE Study

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Abstract

This article analyzes the future features of Iraqi statehood, drawing on hybrid regime theory and a broad understanding of political system transformation. In this context, we assume that post-ISIS Iraq has a pluralistic security perspective (state versus militia), which has led to a second feature: the challenge to the monopoly of violence by the Popular Mobilization Forces. This, in turn, affects the legitimacy of political authority and the state's defense policy. In the article, using hybrid regime theory, social identity theory, and Pierre Bourdieu's concept of homology, the authors argue that Iraq is not a failed state, but a country with a highly hybrid political system, where formal democratic institutions coexist with informal networks of sectarian and militarized power. By examining the historical development of Shia militias and their integration into the Iraqi state system since 2014, the article reveals the rise of parallel governance structures and security pluralism. The dual identity of the Popular Mobilization Forces, as a state-backed military force and an autonomous sectarian formation, challenges Max Weber's ideas of sovereignty and the sociology of the state, blurring the line between legitimacy and coercion. The example of Iraq is illustrative and particularly interesting, as the formation of a new elite took place in conditions of political and sectarian conflict and struggle. Moreover, the emergence of a new elite in the new Iraqi state and Iraqi society occurred simultaneously with regional transformation processes, characterized by global and regional clashes between different centers of power, which, in turn, influenced the hybridization of Iraq's domestic political processes.

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Introduction

Modern Iraq offers a unique example of the rebuilding of state structures after a massive military invasion. This process was initiated by the aggressor state and took place under its close guidance and supervision. However, the initial conditions of US external control were modified by the new Iraqi elites who came to power, organizing themselves into new political parties and parliamentary blocs that functioned within the framework of newly created government bodies, including those responsible for foreign policy.

Iraqi political forces, operating within the context of a political system created externally and forced to largely follow the interests of its architects, also had their own interests. To realize these, they needed to maneuver in the foreign policy arena, developing relations with other states—primarily Iran, the Sunni Arab states of the region, Turkey, the EU, European states, Russia, China, and other global and regional players. In the current context of active US interference in the internal affairs of states whose behavior does not align with the American vision of global strategy, the experience of Iraq, which is gaining foreign policy agency following the externally orchestrated collapse of its state system, is of particular interest and underscores the relevance of this research.

The post-2003 political transformation of Iraq provides a powerful perspective for examining the development of statehood in the Middle East, especially in areas influenced by foreign intervention, sectarian politics, and non-state armed groups. The U.S.-led invasion of Iraq not only removed the Ba’athist regime but also initiated a fragmented and contested process of rebuilding the state. The result in the following years was not a unified democratic state but a hybrid political system characterized by the coexistence of democratic institutions and authoritarian practices (Levitsky and Way 2010; Schedler 2002). Among the most influential actors in this transformation have been Shia armed groups, which gained prominence after Saddam Hussein’s fall. Their roles have included filling security voids, resisting foreign occupation, and participating in state formation and politics. The Popular Mobilization Forces (PMF), in particular, mark a significant turning point in the militarization of politics and the hybrid nature of the Iraqi state. These developments have blurred the distinctions between formal and informal authority, state and non-state actors, and legitimate and illegitimate violence. Despite the presence of elections, a constitution, and democratic institutions, the Iraqi state has struggled to establish a strong, centralized monopoly on violence or achieve sustainable governance. The growing involvement of Shia armed groups within the state apparatus has contributed to a fragmented and often contradictory governance system, resembling a hybrid regime (Dodge 2012; Dodge 2024; Mansour 2021). The institutionalization of militias, especially the PMF, exemplifies a form of security pluralism that remains under-theorized in mainstream discussions of hybrid regimes.

In this research, we seek to analyze the role of Shia armed groups, especially the PMF, in the hybridization of the Iraqi state post-2003 and post-2014. We aim to explore how these actors function as both state-builders and spoilers, and how their political, military, and symbolic capital has reshaped Iraq's political landscape. Specifically, our paper will first investigate how Shia militias were integrated into political and security institutions, and secondly, we explore how sectarian identity was leveraged in state-building processes. Finally, we theorize the coexistence of parallel armed formations as a core feature of Iraq's hybrid regime.

Research Questions

To understand the hybridization process of the Iraqi state since 2003, and specifically in the post-ISIS era, we pose a question in this paper as follows: *How has the natural structure of Shia armed groups, characterized by confrontation, conflict, and resistance, helped shape and influence the hybrid nature of the Iraqi political system?*

By combining hybrid regime theory with insights from political sociology and identity theory, our paper presents a multifaceted view of how non-state armed groups function within and around official state institutions. While much of the existing literature has concentrated on electoral manipulation or institutional decline (Schedler 2002; Levitsky and Way 2010; Palani 2025), our research underscores the security aspect of hybridity, especially the coexistence of parallel military forces and sectarian dynamics, which are key to Iraq's post-conflict situation. Additionally, the paper highlights important gaps in the current Iraq literature: specifically, the long-term political impacts of PMF integration, the sectarian shaping of national identity, and the gradual loss of state legitimacy from both grassroots and institutional levels (Haddad 2020; Mansour 2017; Linde 2009).

Theoretical Framework

The Iraqi case highlights the complexities of post-conflict statehood, where democratic institutions coexist with informal networks of coercion, patronage, and identity-based mobilization. To understand these contradictions, our research uses an interdisciplinary theoretical framework that combines Hybrid regime theory, Social identity theory (SIT), and Bourdieu's theory of homology. Together, these frameworks provide a nuanced understanding of how state authority, identity, and armed power intersect in Iraq's complex political landscape.

Hybrid regime theory (HRT): According to HRT, political systems that lie between democracy and authoritarianism can be in the circle of hybrid regimes. These types of regimes often have democratic institutions—such as elections, parliaments, and constitutions—yet lack genuine political competition, the rule of law, or civil liberties (Levitsky and Way 2010; O'Driscoll and Costantini 2024). These regimes allow very limited pluralism and maintain informal authoritarian control by clientelism, repression, and manipulation of institutions (Schedler 2002). Such regimes have increased in the post-Cold War period, especially in transitional states where international pressures for democratization meet strong informal political legacies (Ekman 2009; Cassani 2014). Scholars frequently identify features like electoral

authoritarianism, competitive authoritarianism, and illiberal democracy as minor symptoms of hybrid regimes (Diamond 2002; O'Driscoll and Costantini 2024). In post-2003 Iraq, the democratization process efforts resulted in the creation and development of electoral institutions, a constitution, and power-sharing mechanisms. However, these formal structures were compromised by ethno-sectarian patronage networks, politicized security forces, and widespread corruption (Dodge 2012; Mako and McCulloch 2024). Our research suggests that Iraq exemplifies a deep hybrid regime where not only institutions but also security forces are hybridized.

Social identity theory (SIT): This theory, developed by Henri Tajfel and John Turner (2000), argues that individuals derive part of their identity and self-esteem from group affiliations, and it is based on three pillars: 1) Social categorization (us vs. them), 2) Social comparison (evaluating one's group relative to others), 3) In-group favoritism and out-group bias.

This process becomes politically salient when identity is tied to access to power, resources, or legitimacy.

In the post-2003 Iraqi context, SIT helps to understand the recurrence and politicization of Shia identity in the post-Saddam era. Historically, the Shia population was marginalized under Ba'athist rule, and they emerged as the political majority in the post-2003 period. This dynamic change of the Shia identity was both psychological and institutional: As a marginalized people in the past, they came into new positions of power while reinforcing narratives of historical victimhood and moral superiority (Haddad 2020). From that perspective, the Shia militias exploited these dynamics by portraying themselves as defenders of the community and the nation. In-group narratives were reinforced through religious rituals (e.g., Ashura), media, and political discourse, while Sunni communities and Western forces were often framed as out-groups.

Bourdieu's theory of homology: Pierre Bourdieu's sociological theory focuses on the concepts of field, capital, and habitus (Bourdieu 1984, 1991). Fields—like religion, politics, or the military—are arenas of competition for power and legitimacy. Capital can be economic, cultural, symbolic, or political, and individuals or groups will take advantage of it to advance their position within or across fields. Homology states the structural correspondence across different fields: people who occupy similar positions in one field (e.g., religion) tend to occupy similar ones in others (e.g., politics). This pattern reflects shared habitus, or embodied dispositions shaped by social conditions.

Homology in Post-2003 Iraq

Bourdieu's theory is particularly valuable in understanding how Shia identity in Iraq is embedded across multiple fields:

- Religious field: Faithfulness to clerical institutions in Najaf or Qom,
- Political field: Backing for parties like Dawa, SCIRI, or PMF-affiliated factions,
- Cultural field: Magnifying martyrdom, pilgrimage, and resistance,
- Economic field: Access to state resources via militia-linked networks.

For example, members of the PMF not only rely on military power but also on religious legitimacy and populist discourse. These areas are interconnected—they

reinforce each other and help Shia armed groups build multidimensional authority (Mansour 2017; Mako and McCulloch 2024).

A Dual Theoretical Perspective

In this part, first, we look at how identity meets structure, and by integrating SIT with Bourdieu's theory of homology, we identify that identity is not only a psychological anchor but also a structurally conditioned position within Iraq's deeply divided social fields. Using the SIT, we will clarify why individuals affiliate with certain groups and adopt in-group symbols. Bourdieu explains why those groups' symbols vary by class, field, and political access. This integrated framework allows us to reconceptualize hybrid regimes beyond their institutional façade. It highlights the coexistence of multiple sources of authority—military, religious, symbolic—and the hybridization of state functions via informal and sectarian channels. Iraq, therefore, is not simply a failed democratic project but a deep hybrid regime where fields are restructured around identity-based capital and armed networks. We have outlined a multi-layered theoretical framework to analyze Iraq's hybrid political system. By combining Hybrid regime theory, Social identity theory, and Bourdieu's theory of homology, we offer a strong lens to explore how Shia armed groups mediate statehood, identity, and power in post-2003 Iraq.

Theoretical Contributions

By doing this research, we have developed the Hybrid regime theory by including the dimension of security hybridity, and arguing that the coexistence of parallel military structures should be recognized as a defining and not subsidiary feature of certain hybrid regimes. Existing models have focused primarily on electoral authoritarianism or institutional erosion (Levitsky and Way 2010; Mako and McCulloch 2024), while neglecting how the monopoly on violence is fragmented in post-conflict contexts like Iraq. By merging Social identity theory with Bourdieu's sociology, we provide a more comprehensive understanding of how identity is formed and positioned within hybrid regimes. While SIT explains individual and group-level identification processes, Bourdieu highlights the structural reproduction of power through habitus, capital, and field. In conclusion, we can say that these theories provide a strong framework for analyzing sectarian state formation in Iraq.

Historical Background of Shia Armed Groups in Iraq

The political and military development of Shia groups in Iraq needs to be understood by looking at the historical factors that shaped their emergence. In the first stage, they were portrayed as fighters and resistance to Saddam Hussein's Ba'athist regime, then to their integration and reconstruction of the political system in the post-2003 political order, and finally, they are now institutionalized within state security structures after 2014, which has put them both in function and form (Beese 2024). By using a chronological and analytical approach, we account for these groups' transformation, demonstrating how their path is closely linked to broader processes of state failure, sectarianism, and hybridization.

1. The Shia Community during the Authoritarian Repression (1980-2003): The situation for the Shia community in Iraq changed significantly during the eight-year war between Iraq and Iran. Although the Shia were integrated into various aspects of Iraqi society, the war led them to resist Saddam Hussein's regime. Political and religious groups within the Shia community faced systematic repression, with major parties like the Islamic Dawa Party and the Supreme Council for Islamic Revolution in Iraq (SCIRI) being banned. As a result, many leaders went into exile, primarily in Iran. In 1982, SCIRI established its armed wing, the Badr Brigades, with support from the Iranian Revolutionary Guard Corps (IRGC). These militias, initially formed during their exile, later returned to Iraq with strong transnational connections and ideological influences stemming from the Iranian Islamic Revolution. Since the Gulf War in 1991, a new era started for the Shia community, where they faced systematic marginalization. The 1991 Shia uprising in southern Iraq, following the Gulf War, was brutally crushed by Saddam's forces, further entrenching a legacy of state violence and victimhood. These influential experiences fostered deep distrust toward centralized state institutions and helped lay the foundation for community-based security networks.

2. Political Dominance and Fragmentation (2003-2014): Post-Invasion 2003 marked a Shift in the balance of power, and the whole Iraqi social and political construction was changed. The invasion led to the dismantling of Iraq's Ba'athist regime and started a new political era dominated by Shia Islamist parties, many of which returned from exile. The Dawa Party, SCIRI, and later the Sadrist Movement became dominant forces in the new political field (Dodge 2012; Dodge 2024). On the one hand, during this period, the intra-Shia competition started. On the other hand, there is growing Sunni disenfranchisement. While the Shia were in their euphoric time and they were celebrating for removal of Saddam's regime, a bloody sectarian confrontation broke out. As a result of this, the Shia militias, in the name of the Mahdi Army, were formed and led by Muqtada al-Sadr. Emerging as a populist force rooted in urban poor communities, the Mahdi Army waged both anti-U.S. insurgency and sectarian warfare during the 2006–2008 civil conflict. At the same time, SCIRI's military wing, now renamed Badr Organization, was deeply embedded within the Ministry of Interior and other state institutions (Mansour 2017; Mansour and Jabar 2017). These developments reflected the militia-state duality—Shia armed groups operated both within and outside formal political structures, often shaping state policy while maintaining autonomous armed capacity.

3. Post-2014 as a New Era for the Institutionalization Process of the PMF: Two turning points happened in the new history of Iraq, and they were the fall of ISIS and a Fatwa from Sistani for the formation of the PMF. First, the control of ISIS of the Sunni cities and the fall of Mosul as the second-largest city to ISIS in June 2014, triggered a national crisis. In the sake of the Shia population from the barbaric behavior of ISIS, Grand Ayatollah Ali al-Sistani issued a fatwa calling for the defense of Iraq. It resulted in the formation of the PMF, an umbrella coalition of mostly Shia militias, though it later came to include Sunni, Christian, and Yazidi units as well (Mansour 2021). The PMF was quickly legalized by the Iraqi parliament and other Iraqi state institutions. But maintained considerable operational independence.

Fragmentation and Factionalism

The PMF is not a monolithic force. It comprises three loosely defined factions:

1. Pro-Iranian groups (e.g., Kata'ib Hezbollah, Asa'ib Ahl al-Haq) with ideological and logistical ties to Tehran,
2. Clerically aligned groups (e.g., Saraya al-Salam, those affiliated with Sistani),
3. State-aligned groups with formal ties to Iraqi national institutions.

The internal diversification and fragmentation of these armed groups reflect the heterogeneous nature of hybrid power in Iraq. Even though these groups have been legalized under the law since 2016, but still these militias pursue different agendas, operate under different command structures, and express varying degrees of loyalty to the state.

From Insurgents to Institutions: The Institutionalization of Iraqi Shia Militias in State Power

After the military defeat of ISIS, PMF-affiliated political factions participated in the first parliamentary election in post-ISIS Iraq in 2018, and subsequently became formally involved in and integrated into the country's established political structures, operating within institutions such as governments, legislatures, courts, and political parties. The Fatah Alliance, composed of groups like Badr and Asa'ib Ahl al-Haq, won a significant share of seats in the 2018 parliamentary elections. This marked an important phase in the militia-to-party transition, similar to Hezbollah's dual role in Lebanon. These groups not only occupied sectors such as defense and security policy but also engaged in ministries and governing institutions. Although they entered politics, it did not, however, mean that they disarmed and demobilized; they now operate on two levels—having political parties where they actively exercise their political rights, and maintaining military wings that can be used at any time to gain more power or to pressure groups that oppose their interests (Mansour 2021; Mansour and Salisbury 2019). As a consequence of this long and very complicated process, these armed groups become a parallel governance and provide services such as security, infrastructure repair, and welfare distribution in areas where the central government is weak or absent. This action from the groups can easily and smoothly take place in the Iraqi society, and specifically inside the Shia community, due to the community's feature of being clientelism. This positions the Shia armed groups as parallel governance providers, strengthening their grassroots legitimacy and reinforcing identity-based networks. Their embeddedness in the state enables access to public funds, patronage networks, and immunity from legal accountability (Haddad, 2020). The table below illustrates the evolution of Shia armed groups in Iraq. Initially, they were characterized as rebels fighting for their rights against the Ba'ath regime. After Saddam's fall, there were two main groups of Shia armed factions: the first, such as the Mahdi Army, was considered an informalized group, while the second, including groups like Badr, Islamic Dawa Party, and Islamic Supreme Council of Iraq, shifted from armed struggle to political competition. They engaged in formal politics, becoming deeply embedded in the architecture of the post-2003 Iraqi state. The turning point came after the post-Sistani Fatwa, which transformed these groups into entities

seen as institutionalized and legalized by law. Ultimately, they became the architects of Iraq's hybrid regime through their roles in governance, identity construction, and coercive authority (see Table 1).

Table 1. Critical Junctures in the Evolution and Hybridization of Armed Power

Period	Militia Evolution	Role
1980-2003	Exile & repression (Dawa, SCIRI, Badr)	Resistance; ideological growth
2003-2010	Mahdi Army, Badr, and militias in the government	Armed insurgency, ministry infiltration
2014-2017	PMF formation after Sistani's fatwa	Counter-terrorism, national mobilization
Since 2017	PMF legalized and entered politics (Fatah Alliance)	Hybrid militia-party governance

Case Analysis: Iraq's Route to the Hybridization Process

The historical and chronological analysis of these groups allows us to better understand them and provides a foundation for implementing the theoretical framework to evaluate how the PMF influences the hybridization of the Iraqi state in the post-ISIS era. In the next section of our article, we examine the hybridization of the Iraqi political system, applying theories and historical background to analyze the actual transformation of the Iraqi state, with particular focus on the PMF and the logic of hybrid governance.

The Pathway for the Start of the Hybridization Process

One of the most important turning points in the modern history of Iraq and in the history up to the hybridization of the Iraqi system is the post-2003 era. The post-2003 Iraqi state contains all the essential features of a hybrid political regime: maintaining the system, which only on the surface covers structures of democratic governance, and that system, with all its institutions, is formed very sharply by informal networks of power, patronage, and coercion (Levitsky and Way 2010; Schedler 2002). What is more undeniable and unarguable is that the hybridization process is more evident in the field of security, for example, the Iraqi formal state institutions to a high degree are under the command of influential Shia armed groups' leaders, most notably the PMF. Even though officially the Iraqi security institutions are separated from PMF and factions, still, these Shia commanders from PMF and factions are so powerful that they control every corner of the security sectors. They are not only infiltrating electoral or institutional establishments, but also (to a very high probability, they are the sole engineers behind the designing of the state institutions) in their security architecture and identity-based political order. In the following sections, we will explore and identify the key factors, focusing on the PMF and other factions, through theories to understand how these armed groups have been able to transform the Iraqi political system in the past and will continue to do so in the future.

The Hybridization Process through Militia-State Integration

Legalization Without Demilitarization: Since 2016, the PMF has been officially recognized and incorporated into Iraqi state institutions by the Iraqi parliament through Law No. 40. This law includes two essential features: first, it provides the legal requirements, and consequently, it legalizes the existence of the PMF. The most important feature is the funding sources that finance its operations, logistics, and member salaries. To secure its funding, the PMF came under the Ministry of Defense. However, this did not change its hierarchy or organizational chains; instead, it retained its command structures, ideological orientations, and material resources, resulting in a dual authority structure within the security sector (Mansour 2021; Mansour and Salisbury 2019). This duality—being part of the state on one hand and maintaining its network on the other—led to the PMF being created as a temporary entity, not a transitional one, but rather as an institutionalized force. It distorted the boundaries between the state and non-state armed groups. While the PMF is paid by the state, they are not fully subordinate to its command, exemplifying what Schedler (2002) would call a "menu of manipulation," adapted from the political to the military domain.

Parallel Armies are an Advantage, not a disadvantage: Now the PMF is operating as a parallel army, while the PMF can still keep its ideological goals, strategic priorities, and territorial control zones. Shia political parties that have ruled since 2014—a year that is seen as a turning moment in the formation of the PMF—have embraced military pluralism as a governance strategy, reflecting a deeper kind of hybridization in which it is not just a symptom of state weakness. Diverse groups of factions within the Iraqi government that have been in the formation of the government and now are working intensively in the state's institutions rely on the PMF for getting political support, electoral backing, and dominating over local constituencies (Mansour 2017; Mansour and Jabar 2017). In this regard, we can say that militia involvement in politics will be seen as a tool of elite competition, not simply a security necessity.

Identity, Loyalty, and Political Capital

Sectarian Identity as Political Currency: Social identity theory (SIT) helps explain the rise of in-group/out-group dynamics that underpin the legitimacy of Shia militias. PMF units have strategically framed themselves as defenders of the Shia community, particularly in their battles against ISIS, which was often portrayed as a Sunni-dominated force. This narrative has reinforced in-group solidarity while fostering distrust and marginalization of out-groups (Haddad, 2020). The PMF thus mobilizes sectarian identity not only for recruitment but also to claim moral legitimacy in the national imaginary. This becomes a form of symbolic capital in Bourdieu's terms, which can then be converted into political and economic power.

Homology across Fields

Drawing on Bourdieu's theory of homology, the PMF's influence cuts across multiple social fields:

- **Political field:** PMF-affiliated parties like the Fatah Alliance hold seats in parliament and ministerial offices,

- Religious field: Strong ties to clerical authorities, both in Iraq (Najaf) and Iran (Qom),
- Cultural field: Dominance in martyrdom imagery, Shia rituals, and media narratives,
- Economic field: Access to reconstruction contracts, state salaries, and smuggling networks.

The alignment of these positions across fields is not coincidental but reflects a structured homology, the parallel consolidation of symbolic, political, and material capital around sectarian-military identity (Bourdieu 1991).

Security Governance and the Fragmentation of Sovereignty

One of the most essential features of the hybridization process is that the monopoly on violence is weakened. In our view, Weber's definition of the modern state as holding a monopoly on the legitimate use of violence is no longer applicable to Iraq. The following factors, like the multiplicity of armed actors, their partial incorporation into the state, and their independent command structures, suggest that the state's sovereignty is fragmented and conditional (d'Avray 2023; Viviani 2024). This fragmentation is not only because of the existence of the PMF, but the tribal militias, Kurdish Peshmerga, and Sunni mobilization units also further push Iraq's sovereignty into a more disintegrated way. Even though the PMF remains institutionally integrated in a way that makes it an identical pillar of governance, and, in parallel, performs the governance jobs.

Since the Iraqi society is considered clientelism, the governance is by consent and coercion. The PMF has two sides of the government's style, not solely by force, but by creating the networks of services, patronage, and symbolic power. For example, in cities like Basra or Diyala, PMF-allied organizations distribute aid, settle disputes, and provide security. It results in the creation of parallel sovereignty structures that rival the central state and increase dependency on factional loyalty over national citizenship. The second side is that the PMF is willing to use force to get the Iraqi Shia majority's consent and acceptance. The PMF used the election and electoral system to penetrate politics, which was one of their most successful tools in their struggle to provide a legal base. Then and since the post-ISIS era, the PMF transitioned into formal politics. Their first step in integrating into politics was in 2018. They participated in the 2018 parliamentary elections under the umbrella, the Fatah Alliance, composed of PMF-aligned factions, and secured significant parliamentary representation. That transformation and adaptation of PMF into politics exemplifies a classic case of electoral authoritarianism within a hybrid regime, where armed actors turn into electoral competitors without losing or changing their coercive power (Skaaning 2025; Levitsky and Way 2010; Mako and McCulloch 2024). This turning point of PMF and its factions does not mean they are involved in politics because they believe in democratic principles, and they are participating to gain power to form a government or in the name of democratic consolidation. In contrast, they still maintain their military wings and can use them at any time; instead, it legalizes and normalizes the role of armed factions in democratic processes, emphasizing what Schedler (2002) would describe as a manipulated pluralism.

Post-Conflict Era and the New Social Contract in 2019

The post-2019 period will be called one of the most terrible times for Iraqi society and also for the Iraqi state. We suppose that two sides of the story are vital to mention here. First, the ending of 2018 and the beginning of 2019 witnessed the birthing of the protest movements, the so-called (Thawrat Tishreen). Tishreen is described as a Shia middle-class protester against the Shia warlords, who, after ISIS dominated the society via religion and by sanctification themselves as protectors of religious sites and as protector of the Shia societal security. The October 2019 protest movement not only challenged the sectarian-militia order, but it also demanded reforms in the different sections, like in the judicial organ and parliament establishment, and encouraged the government to protect the national sovereignty by refusing the unstoppable Iranian involvement in Iraq. But the protesters were answered with violence, which led the PMF and its factions to clash with their own people and killing many of them. This confrontation changed the heroic picture of PMF and the Shia protector to be a tool in the hands of the corrupted politicians who had brought more and more problems to the Iraqi people. It portrayed the resistance of hybrid actors to state reform, particularly when such reforms threaten their political and material interests (Yoshioka 2026; Mansour 2021; Mansour and Salisbury 2019).

The second point is that the post-ISIS Iraqi state's efforts to contain the PMF. The Iraqi state's efforts to restructure, redesign, or demobilize PMF units have been largely unsuccessful. The state has attempted to bring the PMF fully under the command of the Iraqi Armed Forces, and has also tried to reduce their budget allocations, and both efforts have been met with resistance within parliament and on the ground. In conclusion from these two points, we can say that Iraq's post-2003 political system has gradually evolved into a deeply hybrid regime. It has divided the country's sovereignty and authority so that formal institutions coexist with informal centers of coercive and symbolic power. The PMF is no longer just a transitional, contemporary security actor providing protection to the Shia community; instead, it has assumed a role similar to a structural pillar of this hybrid order. Their integration into state structures without full subordination, their political entrenchment, and their symbolic influence over sectarian narratives all contribute to a system that is neither fully democratic nor entirely authoritarian but remains a durable hybrid.

The Repercussions of Including Shia Armed Groups in the Government's Machinery.

In the following part, we will identify and explore the implications that these armed groups will create for the Iraqi state's institutions in the post-ISIS era. We will also examine how the hybrid regime model affects important aspects of governance, from service delivery and accountability to reform prospects and public trust.

Firstly, the hybridization process of Iraq's political system, which resulted in, especially by taking the Shia armed groups involved into state and quasi-state structures, has created implications for state-building, governance, and reform. Even though the initial intent behind the PMF was to create a responsive force to combat ISIS, the long-term entrenchment of these militias has reshaped the logic of political

authority and legitimacy in Iraq. Institutional Fragility and Parallel Governance Secondly, the state's institutional authority has fragmented in such a way that its one and only authority has now transformed into a multipolar system. This is the key factor that distinguishes our case—the hybridization of the Iraqi state—from previous studies. Beyond earlier theories and models about hybridization, we consider the complex and spiderweb-like structure of Shia armed groups in Iraq. These groups, by their nature, will grow and develop within a hybridized and multipolar authority system. We believe this is a crucial point in understanding our paper: the regional and international political environment is very important for interpreting and analyzing these groups. Gradually, through a well-structured plan, these armed groups have pushed the Iraqi state into a hybridized form.

In this context, we suggest that institutional incoherence is among the most obvious effects of hybridization. Despite being officially a unitary state, the Iraqi state has several centers of authority. Although ministries are subject to legislative requirements, state troops, local players, and militias make up the security environment. As a result, the state becomes less cohesive and its administrative and territorial sovereignty becomes fractured (Yoshioka 2026; Dodge 2012). The political environment of Iraq is not a party-free system; in contrast, many different parties participate in elections and compete for a seat in parliament. As it is highlighted by Levitsky and Way (2010) that one of the most attractive features of the competitive authoritarianism structure leads regimes to adopt democratic forms without democratic substance. We can conclude that the end effect is a type of state mimicry in which power is distributed through unofficial routes while maintaining the outward characteristics of a contemporary state, such as bureaucracies and elections (Levitsky and Way 2010). Despite their legal standing, the PMF frequently has more authority than the official military, establishing alternate governing domains and setting their own objectives.

In their struggle to renew their social/political bond with the community, the PMF, by applying the basic services to these areas where they control, acts like shadow governance. For example, in areas such as southern Iraq and contested Sunni regions like Musel, Salahadin, and Anbar, PMF-affiliated groups engage in basic service delivery, including food distribution, infrastructure repair, and dispute mediation. The aim of these functions will improve the PMF's local legitimacy, especially when state institutions are perceived as corrupt or absent. According to Mampilly (2011), this is similar to rebel governance patterns seen in other hybrid environments. The PMF, however, functions both inside and alongside the state, making it difficult to distinguish between insurgency and official authority, in contrast to traditional rebel governance. Another tool in the hands of armed groups is the card of sectarianism and highlighting sectarian identity with the aim of strengthening the political legitimacy among the Iraqi Shia community. The PMF has, since its rise, adopted sect-centric nationalism rhetoric. The base for the PMF's legitimacy often comes not from national institutions but it derives from sectarian stories that underline Shia martyrdom, resistance, and historical injustice. At the expense of inclusive governance, this sect-centric nationalism strengthens in-group favoritism and widens identity gaps (Haddad 2020). In such a system, sectarian affiliation and allegiance to networks connected to

militias are used to distribute legitimacy rather than equal citizenship. These unofficial structures frequently manage political appointments, contracts, and access to public resources, supporting what Bourdieu (1991) may refer to as symbolic domination—the capacity to normalize unequal power distributions through cultural or moral discourses.

Another feature that is gradually starting the hybridization of the Iraqi political system is the political clientelism that benefits the political parties to capture the country's resources. Political parties with ties to the militia have used their access to government agencies to extract rent and engage in patronage. Party quotas, rather than meritocratic standards, are frequently used to award ministries and public contracts, which allows partisan interests to acquire bureaucratic power. This strengthens the neopatrimonialism system (Hasan 2023; Bratton and van de Walle 1997) in which holding public office is viewed as a means of accumulating riches for oneself and one's faction. It further alienates marginalized groups, especially Sunnis and secular Shia, and erodes public trust.

The Crisis of Reform: Resistance from Within

The post-2019 era is a starting point for a new wave and circles of conflict and violence. The conflict is no longer between these two sects: Shia and Sunni, but it goes beyond them. Intra-Shia community conflict, which came to the political stage in Iraq since 2019, by fought among the different factions for gaining more control over natural resources and dominance among Shia populations, complicating the process of disarming these militias and reintegrating them into the official army. Mass disenchantment with the sectarian-militia state was reflected in the October 2019 protest movement, also known as the Tishrin uprising. In addition to jobs and services, protesters called for an end to sectarian politics, militia bloodshed, and foreign meddling. More than 600 civilians were killed in the ruthless response, many of them by snipers connected to militias or security personnel (Amnesty International 2020). This militaristic reaction to democratic demands highlights how hybrid regimes may be both open on the surface and extremely repressive, particularly when change jeopardizes the informal players' base of power. Since the Thishrin uprising, the image of armed groups has changed, and public opinion about them has also altered. Then all the requests and hopes for the reform were blocked because of the factional interests. Real structural change has proven indefinable despite repeated appeals for reform from international funders, religious leaders, and civil society. Parliament has thwarted or softened attempts to enact anti-corruption laws, break up militia networks, or restrict party influence over ministries (Mansour 2021; Mansour and Salisbury 2019). This highlights the fundamental contradiction of hybrid regimes: those most able to implement reform are frequently those who stand to lose the most. As a result, reform efforts are either completely shelved or used for partisan advantage.

All these events resulted in declining public trust, erosion of citizenship, and a decline in confidence in state institutions. Many years of sectarian clientelism, economic stagnation, and militia impunity have declined public trust in state institutions, as it has been shown by surveys and field interviews (UNDP 2025; WHO 2023), a growing perception that political elites, including militia-affiliated parties, govern in their own interest rather than that of the people. This eroding and

deterioration of the state's vertical legitimacy is in parallel with a weakening of horizontal trust between Iraqis themselves, particularly between sectarian communities. It leads to trends that pose a long-term risk to the viability of national cohesion and institutional stability. Another feature that is highly revealing and radical in our paper is the crisis of representation and political estrangement. The hybrid system in Iraq has led to the development of political elite increasingly unaccountable to the electorate. The level of participation of voters in the voting system has steadily declined since 2005, and Iraqi younger generations, especially those involved in protest movements during 2018 and 2019, express deep pessimism toward formal politics (Haddad 2020). As militias establish themselves as both governors and guardians, the space for democratic alternatives diminishes. This crisis of representation may not cause immediate regime collapse, but it weakens the prospects for democratic deepening.

Caught between re-entrenchment and reform

We Suggest Three Scenarios for the Future of these Armed Groups:

1. Re-entrenchment: The hybrid order persists, with militias continuing to operate in and around state institutions, suppressing dissent and reproducing factional governance.
2. Gradual Reform: External and domestic pressure led to incremental change, integration of PMF under one national command, technocratic reforms, and limited anti-corruption measures.
3. Collapse and Realignment: Prolonged economic crisis or regional war triggers a collapse of the hybrid consensus, leading to either renewed conflict or a forced renegotiation of Iraq's political order.

Prerequisites for Reform:

- Demilitarization of political life
- Strengthening of national institutions
- Rebuilding cross-sectarian coalitions
- Legal and constitutional limits on militia activity

International actors can play a role, but change must ultimately come from within Iraqi society through civic engagement, elite defection from the status quo, and sustained public pressure. Iraq's hybrid regime has created a political system that is simultaneously adaptive and obstructive. While militias have contributed to territorial defense and local governance, their entrenchment in state structures poses a fundamental challenge to the rule of law, national sovereignty, and democratic accountability. Understanding these dynamics is essential for crafting realistic strategies for state-building in Iraq and similar post-conflict settings.

Conclusion and discussion

Iraq's hybrid regime has created a political system that is both adaptable and obstructive. While militias have helped with territorial defense and local governance, their deep integration into state institutions challenges the rule of law, national sovereignty, and democratic accountability. Understanding these dynamics is crucial

for developing practical strategies for state-building in Iraq and similar post-conflict environments.

This study has discovered the hybrid nature of the Iraqi political system, focusing particularly on the role of Shia armed groups, especially the PMF, in shaping governance, legitimacy, and security after 2003 up to the present time. Using a multidimensional theoretical approach that combines Hybrid regime theory, Social identity theory, and Bourdieu's theory of homology, the researcher identifies/suggests how Iraq's political order has evolved into a highly hybrid system where formal democratic institutions coexist but are often undermined by informal, identity-driven, and militarized power centers. Iraq exemplifies a form of deep hybridity, where this combination goes beyond electoral manipulation and institutional decline to include the security sector, identity formation, and governance practices.

The PMF is not an anomaly but an integral part of this hybrid structure. Their dual role as both state actors and independent power brokers reveals the contradictions within Iraq's post-conflict reconstruction (Levitsky and Way 2010; Schedler 2002). Rather than existing outside the state, Shia militias, especially those part of the PMF, function within a militia-state continuum, where the lines between formal and informal, legal and extra-legal, are intentionally blurred. This continuum allows militias to access state resources and legitimacy while maintaining independence (Mansour 2021). Applying Social identity theory, the study demonstrates how Shia militias mobilize in-group narratives to reinforce legitimacy. This identity-building is not only psychological but also shaped by broader social and political fields, as Bourdieu's theory of homology shows. The convergence of political, religious, and symbolic capital around Shia martyrdom and resistance deepens sectarian divisions and establishes durable power bases (Haddad 2020; Bourdieu 1991). Iran's support and influence over the PMF further complicate Iraq's sovereignty. The study shows that hybrid regimes are not just domestic phenomena; they are also shaped by transnational patronage, regional rivalries, and identity-based solidarity networks. In this context, Iraq exemplifies embedded sovereignty, a state whose authority is partially delegated to foreign-aligned actors.

The topic of this article has great prospects for further development, which is why many researchers are increasingly traveling to countries in the region, particularly Iraq, to participate in academic events. This provides an opportunity to conduct interviews with Iraqi politicians in order to use the information gathered during these visits in academic work. It is also important to establish cooperation between different academic institutions and those involved in the development of Iraqi policy. Given the importance of developing political and economic cooperation with Iraq, conducting applied academic research on the country becomes vital.

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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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HOMELAND, BELONGING, AND RETURN: PUSH-PULL FACTORS OF ARMENIAN REPATRIATION DURING THE RUSSIA-UKRAINE CONFLICT

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Abstract

This article examines both push and pull factors influencing the repatriation of Armenians in the context of the Russian-Ukrainian conflict and subsequent full-scale war. Based on secondary analysis of statistical data, sociological research, and qualitative materials, including in-depth interviews and focus group discussions, the study identifies key political, social, and economic push factors driving emigration from Russia and Ukraine, including fear of ongoing war, uncertainty, instability, and deteriorating economic conditions. The article also explores key pull factors attracting Armenians to their homeland, including the desire for a safer environment, cultural and social ties, a sense of belonging, a more comfortable lifestyle, and a desire to contribute to the development of their country. Potential factors pushing for repatriation within Armenia are also highlighted, including an underdeveloped repatriation system, persistent security concerns, economic difficulties, limited infrastructure, limited opportunities for professional advancement, and low wages. Taken together, these findings provide a comprehensive understanding of the complex motivations driving Armenian repatriation in a context of regional instability.

Keywords: *Armenian repatriation, Russia-Ukraine war, migration, push-pull factors, integration policy, repatriation system, Armenian diaspora, post-conflict development.*

Introduction

This article attempts to assess the pull-push factors of the repatriation of Armenians from Russia and Ukraine caused by the Russia-Ukraine war. Taking into account the lack of human resources and underpopulation of Armenia, this repatriation emphasizes

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the need for urgent adoption of effective migration regulation and social integration strategies and necessitates proactive measures from policymakers and community leaders to navigate the complexities and opportunities associated with repatriation. The call for swift integration policies stems from a complex interplay of factors, including security concerns, humanitarian considerations, economic implications, and the vital need for social cohesion. In exploring the motivations and dynamics behind Armenians returning home, it is imperative to contextualize within Armenia's broader landscape of push and pull factors.

Theoretical Framework

Migration is a complex and multifaceted phenomenon that has been a subject of social study for decades. As the movement of individuals across borders continues to shape global societies, understanding the theoretical foundations behind migration is crucial. Researchers have long sought to explain why people migrate, the factors driving this movement, and the consequences of such transitions. This section presents the key theories and concepts that underpin the study of migration, focusing on its causes, patterns, and impacts, both on individuals and society.

Migration refers to the movement of populations or individuals associated with changing their permanent or temporary place of residence. It includes groups of people who leave their place of residence (*emigration*) and those who arrive at a new place (*immigration*) (IOM 2024).

The concept of migration refers to the movement of individuals, families, or groups, typically involving a permanent or semi-permanent change in residence. Throughout human history, migration has been a constant, influenced by various factors such as economic opportunities, improved living conditions, educational access, demographic shifts, family reunification, environmental disasters, wars, and even political persecution. These different drivers highlight the complexity of migration, with people moving for both voluntary and involuntary reasons, across domestic or international borders, and for various period of time (Castles, de Haas and Miller 2020).

Scholars such as Demko, Ross and Schnell (1970) argue that migration is one of the most intricate aspects of population dynamics, forming an essential component in societal and economic change. It can be understood as a response to challenges within economic, environmental, and social realms, which are often interconnected (Demko, Ross and Schnell 1970).

Modern migration patterns, a key feature of the 'Age of Migration' as described by Castles, de Haas, and Miller (2020), show significant growth in international migration (Castles, de Haas and Miller 2020). According to the Population Division of the Department of Economic and Social Affairs of the UN, the global number of international migrants—those residing outside their country of origin for at least one year—rose from 93 million in 1960 to 258 million in 2017. Despite this increase, the proportion of international migrants has remained stable at around 3% of the global population. In 2010, there were 214 million international migrants, though this may underrepresent the true scope, as many are undocumented. Internal migration, particularly rural-to-urban movements, continues to outpace international migration,

especially in countries like China, India, Indonesia, and Brazil (United Nations, Department of Economic and Social Affairs, Population Division 2017).

One of the most influential theories of migration was proposed by Everett Lee (1966), who distinguished between ‘push’ factors, which drive individuals to leave their country, and ‘pull’ factors, which attract them to a new destination. These factors operate at the micro-level, influencing the individual decisions of what Lee terms ‘rational actors’ who weigh their options before migrating (Lee 1966).

International migration, as defined by the International Organization for Migration (IOM 2024), involves individuals crossing national boundaries to establish residence in another country, either temporarily or permanently. This movement often aims at better living conditions or economic opportunities. Scholars like Fabio Baggio (2025) suggest several ways to categorize migrants. Geographically, migrations can be transoceanic, transcontinental, border, neighboring, or regional. Chronologically, they are classified as short-term or long-term, temporary or permanent. Other classifications include demographic/economic factors such as individual, family, skill level, or gender, as well as political and legal status, which divides migrants into regular and irregular (illegal) categories. Additionally, migrants are categorized by whether their migration is voluntary or forced (Baggio 2008; Oswald 2007).

Migration is often associated with both hope and apprehension. For migrants, the prospect of a better life—through improved economic opportunities, living conditions, and access to education—can outweigh the risks of displacement, family separation, or even death while crossing borders. However, the challenges remain substantial, as migrants may face exploitation, discrimination, or legal obstacles in their new host countries (Castles, de Haas and Miller 2020).

Host societies have a dual perspective on migration. Historically, settler nations, expanding empires, and strong economies have welcomed immigrants, seeing them as solutions to labor shortages, population growth, and economic stimulation (Phan 2025; Bialas, Lukate and Vertovec 2025; Hadj Abdou and Zardo 2024; Boucher and Gest 2018). However, during times of economic instability or political conflict, migrants are often scapegoated for societal issues, facing discrimination, racism, and sometimes violence, especially when they differ in appearance, behavior, or beliefs from the majority population (Tyrberg 2024; Korol and Bevelander 2023).

Migration is a contentious political issue, often fueled by myths and misconceptions. Claims that migrants take jobs or strain public services lack strong evidence. Research, however, highlights the positive impact of migration on economic growth, innovation, and societal vitality. The increased diversity and transnationalism from migration are seen as beneficial, fostering cooperation and countering nationalism, which drives initiatives like the European Union (Castles, de Haas and Miller 2020).

Migration is not solely a reaction to adverse conditions in one’s home country. Rather, it is often driven by the pursuit of better opportunities and lifestyles elsewhere. Although some migrants experience exploitation or abuse, the majority benefit from migration and are able to improve their long-term prospects. While conditions may be challenging, they are often preferable to the limited opportunities available at home—

highlighting why migration remains a consistent global phenomenon (Castles, de Haas and Miller 2020).

Migration encompasses two interlinked processes: emigration, the act of leaving one's country of origin, and immigration, the arrival and settlement in a new host country. These dynamics are driven by a combination of push and pull factors, such as economic disparity, conflict, political instability, or the pursuit of better opportunities. While emigration often stems from individuals seeking improved living standards or escaping hardships, immigration reflects the needs of receiving countries to fill labor gaps, sustain economic growth, and address demographic challenges (IOM 2024).

These dual processes highlight the reciprocal relationship between sending and receiving nations. Emigrants contribute to remittances and global knowledge exchange, while immigrants bring diversity, skills, and innovation, though debates about integration and resource allocation remain central (Castles, de Haas and Miller 2020).

Contemporary studies have stressed the importance of going beyond just the analysis of migration volumes, routes, and demographic makeup, and instead focusing on understanding migration mechanisms, social models, and patterns. This shift aims to forecast migration trends more effectively and develop informed migration policies. Theoretical concepts in migration studies have broadened, reflecting more complex and diverse views, and the traditional way of categorizing migrants has become increasingly insufficient for addressing the complexities of modern migration (Lee 1966; Amétépé and Hartmann-Hirsch 2011; Bansal, Taylor and St. James 2005; Ferdous 2024). The current global landscape has given rise to new categories of migrants, such as the term 'relocants', which applies to individuals who, though not refugees in the conventional sense, find themselves in similar situations due to external pressures.

The term 'relocants' is particularly relevant for Russian citizens who have left their country in response to the war in Ukraine. These individuals relocate their families and businesses to countries where they can stay for extended periods without visa restrictions. Many are unable to maintain their businesses in Russia due to the war and the imposition of international sanctions (Guild and Groenendijk 2023). These economic and political pressures serve as push factors, driving relocants to countries where pull factors, such as economic opportunities and a stable living environment, attract them (Duszczuk and Kaczmarczyk 2022, 164-170; Dicken and Öberg 1996, 101-120; Marois, Bélanger and Lutz 2020, 7690-7695).

Armenia has become one of the countries receiving relocants due to the ongoing military conflict in Ukraine. Within the first six months after Russia's invasion, referred to as the "special military operation" (Nagy 2023; Voitsikhovkyi and Bakumov 2023; Gill 2022), about 1,000 individuals from Ukraine and Belarus, and roughly 40,000 from Russia, relocated to Armenia (Statistical Committee of the RA 2024a, 2024b). Following Russia's announcement of partial mobilization on September 21, 2022, the frequency of flights from Russia to Armenia surged, nearly tripling within a week. According to data from the RA Police, 19,630 people applied for Armenian citizenship during the first ten months of 2022, with 14,661 of these applicants being Russian nationals. A significant majority, around 97%, of those seeking citizenship were ethnic Armenians. A sharp rise in citizenship applications

began immediately after the conflict in Ukraine started. For example, in January and February 2022, the number of applicants was 643 and 892, respectively, while by March, it increased to 1,670, and by October's end, it had reached 2,256 (Muradyan 2022).

The push-pull factors of migration

Apparently, since the start of the war in Ukraine, many immigrants have been moving from Russia, Ukraine, and Belarus to Armenia and other countries. All these individuals are often referred to as 'relocants': The term used both by themselves and in the media. In their view, they simply move or relocate rather than undergo a significant life change (Melkumyan and Melkonyan 2023).

In his Push-Pull theory Lee proposes that individuals make rational decisions based on comparing their current conditions with potential opportunities in another location to enhance well-being. Crucial factors include 1) conditions in the area of origin, 2) factors in the destination, 3) intervening obstacles, and 4) personal factors. Economic elements like unemployment, low incomes, and high taxes, along with social and political factors such as poverty and discrimination, are repulsive factors. Conversely, factors like economic development, high incomes, security, and job accessibility are considered pulling factors. Personal circumstances, such as the host country policies, economic conditions for business, and societal attitudes, are also part of push factors (Lee 1966).

Marie McAuliffe identifies the key pulling factors: the host country's resettlement policy, acceptance of immigrants, economic conditions of the host country, the presence of the relevant community, diaspora (McAuliffe 2017). Öberg further develops this theory by categorizing factors into hard (humanitarian crises, armed conflicts, natural disasters) and soft (poverty, social inequality, unemployment) (Öberg 1996).

These theories highlighting the push-pull factors of migration, are relevant to examining repatriation, since factors such as dissatisfaction abroad (push) and the attraction of home country (pull) influence the decision to repatriate (Pham 2018).

Repatriation and the notion of homeland in diaspora literature

As mentioned, push-pull factors influence not only initial migration patterns but also decisions about return, often leading to repatriation. This return migration is driven by changing circumstances in both the host and home countries (Prieto Rosas and López Gay 2015). Push factors, like economic hardship or political instability in the host country, may prompt migrants to reconsider permanent settlement. On the other hand, pull factors in the home country, such as improved stability, economic opportunities, or the desire to reconnect with family and culture, can encourage repatriation.

The theory of diaspora and homeland emphasizes the tension between the host country and the homeland. Diasporas, as transnational spaces, continually negotiate belonging, identity, and memory. Scholars like Safran (1991) suggest that the homeland is not just a geographic place but an emotional and symbolic entity shaping migrants' lives. Migrants who maintain ties with their homeland are often influenced

by emotional pull factors when considering repatriation, with the homeland idealized as a place of origin, history, and identity, fueling the desire to return (Safran 1991).

In the diaspora literature, the homeland is understood as a multifaceted concept, often intersecting with political, social, and cultural aspects of migrants' lives. For instance, in the context of Russian migrants moving to Armenia, the notion of homeland can be understood both in terms of the homeland of origin (Russia) and the homeland of heritage (Armenia). The sense of a "return" can be shaped by not only the political push factors from the home country (Russia) but also by the cultural pull factors to Armenia, where many migrants might identify with their ancestral heritage. These emotional and cultural connections, in combination with practical concerns, create a dynamic where the homeland can be both a site of longing and a complex political and social space (Anderson 1983; Cohen 2008).

Darjeva (2018) explores the concept of the 'ancestral homeland', emphasizing the role of Armenian diaspora organizations in shaping the perception of Armenia as a homeland within the Global South. She highlights how these organizations contribute to both the physical and symbolic 'rooting' of a diaspora that continues to evolve as a highly modern and cosmopolitan community (Darjeva 2018).

Thus, repatriation is not only about returning to a physical place but also involves theories of belonging, where the notion of homeland becomes a fluid and shifting concept (Brah 1996). Diasporic communities constantly renegotiate what home means, whether through return or ongoing connections with the homeland, underscoring the complex relationship between push-pull factors, repatriation, and the homeland (Clifford 1994; Owotemu 2025).

The research context

Armenia's repatriation history reveals Armenians returning home for diverse reasons and a profound connection to their roots, the 'ancestral homeland'. The Museum of Repatriation details distinct phases, including Genocide survivors seeking refuge in Soviet Armenia from 1921 to 1936, contributing to the workforce, the 1946-1949 Great Repatriation driven by Soviet territorial claims involving over 90,000 Armenians, and individual immigration from 1950 to 1961 with approximately 4,000 Armenians from Iran, Syria, Lebanon, Greece, Bulgaria, and Romania. After the Soviet Union's collapse, Armenians, especially from the diaspora, returned to support the newly independent Armenian state in the early 1990s. The Artsakh conflict in the 1990s also prompted Armenians worldwide to return and aid their homeland (Chernobrov and Wilmers 2020; Koinova 2021). Following a late 1990s ceasefire, another wave of repatriation occurred as Armenians sought to contribute to Armenia's reconstruction and development in the 2000s (Iskandaryan 2023).

Neil Hauer's 2019 report on Eurasianet highlighted the increasing momentum of repatriation, particularly after the Velvet Revolution in April 2018 (Asriyan and Melkonyan 2019). As reported by Hrant Mikaelian, a statistician and researcher at the Caucasus Institute in Yerevan, over 15,000 people migrated to Armenia in 2018, marking the highest figure in 12 years (Hauer 2019). As a result, around 50,000 repatriates have settled in Armenia since Armenia's independence in 1991. Alongside

with these repatriation processes the net migration was negative until 2022 ((Statistical Committee of the RA 2024a, 2024b).

Nowadays, events such as the Russian armed invasion of Ukraine pose challenges to international peace and security, impacting states and the global order (Voitsikhovkyi and Bakumov 2023). In the aftermath of this conflict, a unique migration trend has emerged within the Armenian diaspora, beckoning Armenians back to their ancestral homeland.

Repatriation holds profound implications for individuals and receiving countries, reflecting a strong tie to cultural heritage and national identity. Following the 44-day Artsakh conflict in 2020 and the subsequent attack on September 13, 2022, by the Azerbaijani armed forces, Armenia is facing a neither war, nor peace situation. With Artsakh now controlled by Azerbaijan, Armenia confronts post-war security, economic, social, and political crises, remaining under the constant threat of renewed hostilities. The National Statistical Committee reports a 0.3% decrease in the birth rate in 2023 compared to 2022 (Statistical Committee of the RA 2024a, 2024b). As Armenia grapples with conflict aftermath and demographic shifts, the diaspora's return becomes crucial for the nation's rebuilding and revitalization efforts.

Research Methodology

This research employs a comprehensive qualitative approach to investigate the push-pull factors influencing Armenians' repatriation amid the Ukrainian crisis. Secondary analysis of official statistics by The National Statistical Committee of the RA, Museum of Repatriation data and relevant content analysis was carried out. The textual documents were studied to examine various sources related to Armenian repatriation amid the Ukrainian crisis. The process involved following steps:

1. Selection of Sources,
2. Data Collection and Categorization,
3. Coding and Thematic Analysis,
4. Interpretation and Triangulation.

Data from The National Statistical Committee of the RA provided quantitative insights into migration trends and demographic changes. The sources from the Museum of Repatriation provided historical and contemporary records of repatriation experiences, policies, and personal testimonies, secondary insights into factors influencing migration, helping to validate or contrast findings. The collected data were categorized based on key themes such as economic conditions, security concerns, national identity, and policy incentives. The coding framework was developed to identify recurring themes in narratives and official documents. Based on the data collected the trends in repatriation motives were established. The findings were cross-verified with statistical data to ensure reliability. Thematic patterns were compared with historical migration waves and geopolitical developments to contextualize repatriation trends. By employing content analysis, this research systematically examined qualitative data to derive meaningful conclusions about the factors influencing Armenian repatriation during the Ukrainian crisis.

Forty in-depth interviews and two focus group discussions were conducted to gather diverse perspectives from repatriates who returned to Armenia following the Russian-

Ukrainian war that began on February 24, 2022, and to obtain detailed first-hand accounts. These methods enabled a nuanced understanding of migration patterns and the key factors influencing integration and long- or short-term settlement in Armenia. The interviews included 20 participants each from Russia and Ukraine. In-depth interview format allowed for open-ended discussions while maintaining consistency across interviews. The following topics were discussed during the interviews: push factors of migration from the country of citizenship, pull factors for migration to Armenia, repatriation experiences (e.g., challenges, adaptation, integration support), settlement plans. During the focus group discussions the community integration challenges, social and economic adaptation, expectations vs. realities of repatriation were discussed. The moderator ensured equal participation, guiding discussions to maintain focus and fostered the participants to share their experiences, compare perspectives, and debate solutions to integration challenges.

To select the interviewees and participants of the focus group discussion the combination of snowball and purposive sampling technics was employed. The purposive sampling aimed to ensure diversity in age, occupation, and family composition.

The in-depth interviews and focus group discussions were audio recorded after the oral informed consent of all the participants. The recordings were transcribed and analyzed using thematic and narrative analyses approaches. All interview and FGD transcripts underwent qualitative coding to identify recurring themes and patterns. The push-pull framework was applied to categorize data based on factors influencing migration decisions. Thematic patterns were cross-analyzed between individual interviews and FGDs to ensure validity and reliability. By analyzing push and pull factors of migration the research aimed to enhance understanding of migration patterns influenced by events such as the Russian-Ukrainian war and paid specific attention to the key elements for better integration and long-term settlement of repatriates (Welfens 2022; George and Sandler 2022; Zubok 2023).

Analysis of push factors from Ukraine and Russia

Emigration from Russia after the invasion of Ukraine by the Russian army in 2022 is the largest wave of emigration from the country since the collapse of the USSR (Kamalov, Kostenko, Sergeeva and Zavadskaya 2022). Accordingly, a distinctive migration pattern has unfolded within the Armenian diaspora, enticing Armenians to return to their ancestral homeland. According to data from the RA Police, 19,630 individuals sought Armenian citizenship in the initial ten months of 2022, with the vast majority (97%) having Armenian roots (Muradyan 2022). Administrative records from the State Register of the RA Population, Migration, and Citizenship Service of the Ministry of Internal Affairs reveal substantial fluctuations in interstate movements of RA citizens between 2022 and 2023. In 2022, a total of 6,839 movements were recorded, with 3,326 arrivals from Russia and 146 from Ukraine. However, in 2023, there was a remarkable surge in total registered movements, reaching 39,518. Movements from Russia increased to 4,187, while those from Ukraine slightly decreased to 125 (Statistical Committee of the RA 2024a, 2024b).

Summarizing the circumstances contributing to emigration from Russia and Ukraine, the following push-pull factors can be distinguished:

1. **Armed conflict forcing to seek safer environment:** The Russia-Ukraine conflict has created an unstable environment, prompting individuals to seek safer locations, and Armenia is perceived as a more stable option. Notably, the Ukrainian war as a push factor is more evident among repatriates from Ukraine.

"I feel like I'm home again, safer and secure. One can never say what will happen there with them. Everything was so vague and unstable." (male, 31 years old)

"I'm not sure if I would have had the courage to move to Armenia alone if it weren't for the war in Ukraine, but now I'm sure that my main home is Armenia." (female, 25 years old)

"During the war in Ukraine I was forced to leave and go to Yerevan all alone; I didn't have any other choice." (male, 40 years old).

2. **Fear of instability and future:** The relocants have a fear if the war will be continuous. Even considering that it will end, they still have an anxiety over the outburst of a new war. Hence, they see no stable peace in Ukrainian conflict resolution, and, as a result, they have concerns of the well-being and future of themselves and their children (especially in Ukraine).

"The end of Ukraine war is so relative. It can end and start again; peace will take much longer. We have a child, it's really hard to make decisions— it is a war after all." (female, 36 years old).

3. **The hazards associated with the worsening economic conditions in Russia,** including the devaluation of the ruble, sanctions, and other related factors.

"And finally, you realize there's no better place but for your homeland. Life had become more expensive in Russia. It is easier, calmer and more comfortable in Armenia." (male, 33 years old).

4. **Sociocultural Alienation:** the feeling of being foreign where they live. Interviewees report experiencing psychological and social disconnection in Russia and Ukraine. Despite their legal ties, including citizenship and education acquired in these countries, they often felt culturally out of place.

"In Ukraine, I didn't feel fully myself. Feels like I've come to life here again, but in Kiev my potential seemed to be extinguishing. I felt so odd there, and sometimes walking along the streets I think: "God, why is everything so foreign?" (female, 38 years old).

Analysis of pull factors to Armenia

In 2022, over 25,000 compatriots applied for Armenian citizenship, marking a record since 1991. The trend of repatriation has been steadily increasing in recent years. Traditionally, the majority of citizenship applicants hailed from Armenian communities in the Middle East. However, in 2022, influenced by the Russian-Ukrainian conflict, the highest number of applications since 2021 came from Russia. The Head of Division at the Office of the High Commissioner for Diaspora Affairs, stated that the Repatriation Office received an unprecedented 10,000 applications in 2022. In 2022, over 25,000 compatriots applied for Armenian citizenship, with more

than 19,000 receiving passports (Armenpress 2023b). Families from both developed and economically disadvantaged countries were part of the repatriation process.

In April 2023, the Chief of the High Commissioner for Diaspora Affairs noted that the strong trends of repatriation were persisting in 2023. From January to March 2023, the office registered 1000 letters, 200 calls, and 60 visits, indicating sustained interest. The Repatriation and Integration Center, opened in 2023 received 400-500 compatriots monthly seeking assistance. As H. Aleksanyan, Head of the Strategy Development Department at the Office of the High Commissioner for Diaspora Affairs, emphasized, repatriation includes three stages: preparation for repatriation, repatriation, and integration, lasting from six months to two years (Armenpress 2023a). Common concerns include education, healthcare, citizenship procedures, and the logistics of relocating personal belongings. Employment and housing challenges remain significant, prompting the center to engage state bodies for additional support if needed.

It should be noted that the pull factors attracting Armenians to their homeland significantly depend on their backgrounds, specifically the history behind their migration to Russia or Ukraine. These pull factors hold particular relevance and strength for individuals born in Armenia who relocated to Russia or Ukraine at a more conscious age. This is also true for those who have consistently maintained connections with Armenia, their families, and relatives, visiting their homeland frequently.

Conversely, for those born in Russia or Ukraine with weaker or no ties to their homeland, the pull factors are not as compelling.

Taking into account the different push factors from Russia and Ukraine, as well as the varied backgrounds and aims of Armenians, the following categories of pull factors can be distinguished:

1. Social-psychological pull factors. The repatriation often evokes a sense of belonging and a warm feeling of homecoming. The war between Russia and Ukraine awakens desire to contribute to the rebuilding and strengthening of one's own country during challenging times. Armenians abroad saw the dual crises as an opportune moment to return and actively engage in rebuilding efforts in their homeland.

"Deep down I have the feeling that I am needed here, and here is exactly where I need to be." (male, 33 years old).

"I always thought that it was worth living and developing your own country, not someone else's." (female, 44 years old).

2. Seeking Security and Safety. In the aftermath of the war in Ukraine, they desire for a stable and secure environment, free from the conflicts experienced in the previous location.

"It's calmer and secure here. I feel safe." (male, 25 years old).

"I feel very safe as a young woman. This is one of the factors why my parents let me come here alone." (female, 29 years old).

3. Familial and Historical Connection. For repatriates who have consistently visited their homeland, the strong familial ties and historical connections serve as a significant pull factor. The sense of family roots and the continuity of traditions make Armenia a meaningful and familiar destination. Additionally, some Armenians seek to

find their life partners with Armenian heritage, contributing to the preservation of family traditions and Armenian genes.

"As an Armenian, it is much better to invest to my own nation and give birth to Armenian children, raise them properly in Armenian society so that they don't grow up in another country like me." (male, 33 years old).

4. Networking and Community Engagement. The desire to build networks and actively engage with the Armenian community becomes a pull factor, especially for those who want to connect with like-minded individuals, participate in community events, and contribute to the social fabric of the country.

"The friendly attitude of Armenians makes it easier for networking and it feels like having an extended family here." (male, 38 years old).

5. Comfortable Pace of Life. Life in Armenia, particularly in Yerevan, offers a distinct contrast to the fast-paced environments of big cities. The manageable size of it lets individuals reach desirable destination within a short time, eliminating the constant rush and tension. This slower, more relaxed pace contributes to a sense of ease and emotional calmness.

"Since the country is small, life pace is more convenient here. For example, in Yerevan you can walk around the entire city in 1.5-2 hours. You don't stand on thorns, stressed that you will always be late" (male, 25 years old).

6. Educational Pursuits. The presence of distinctive educational offerings, such as language courses, cultural studies, and specialized programs, may act as a pull factor for diaspora Armenians eager to deepen their knowledge about their homeland through more structured means. Some Armenians from the diaspora opt to pursue studies at local universities, even with Russian as the primary language for practical use. This choice not only aids in their integration with fellow students but also facilitates a closer connection to the vibrant youth culture in Armenia.

"I had a clear understanding from within that it was in Armenia that I needed to pass the point of growing up study. For me, the most comfortable would be here - I felt it." (male, 25 years old).

7. Cultural Ties. The shared language, history and traditions prompt individuals and families to return and reconnect with their roots in Armenia, making the integration smoother. Knowing Armenian language becomes a significant pull factor, opposed to the need to learn a new language in other countries. Namely, knowing the language is a vital aspect in the process of adaptation.

"What holds me here is my huge family and many relatives in Armenia, close and dear people, the friendly atmosphere, comfort, the safety." (female, 44 years old).

"I have a house here, and I can freely contact everyone since I know the language." (male, 33 years old).

8. Contribution to the Homeland. The war between Russia and Ukraine awakens desire to contribute to the rebuilding and strengthening of one's own country during challenging times. Armenians abroad saw the dual crises as an opportune moment to return and actively engage in rebuilding efforts in their homeland.

"I always thought that it was worth living and developing your own country, not someone else's." (male, 33 years old).

9. Entrepreneurial Opportunities. Some repatriates see Armenia as a land of entrepreneurial possibilities. The chance to contribute to the local economy, start businesses, and participate in the development of the business landscape becomes an attractive pull factor after the economic crisis in Russia.

“Since we were given the opportunity to find our office, everything has changed for 80%. It was the basis for our stay, and if the business is successful, we will stay.” (male, 38 years old).

Analysis of push factors from Armenia

We have discussed in detail the factors that led Armenians from Russia and Ukraine to move to Armenia, contributing to their permanent stay and eventual repatriation. However, it is essential to recognize the push factors that may compel those who immigrated due to the Russian-Ukrainian war to leave Armenia, potentially hindering their repatriation. These factors encompass a spectrum of concerns, ranging from security considerations and economic challenges to issues related to infrastructure, professional growth, and the overall repatriation system. Here are the main potential push factors from Armenia:

1. Security Concerns stemming from regional conflicts and geopolitical tensions are potential push factors for repatriates, who seek safety and stability, as conflicts with Azerbaijan could lead to the outbreak of a new war.

“I have two homelands - Armenia and Ukraine. And I have worries about both of them...I have pessimistic views on the state of the country.” (male, 25 years old).

“We escaped the war there, but a new war might break anytime here. We are double-stressed, and the whole nation is in stress now. The only thing that soothes me is being home again and reuniting with relatives and friends.” (female, 44 years old).

The central issue is the dichotomy between safety and security in repatriation. Returning individuals seek stability, comfort, and a sense of belonging in their homeland, and safety here is a pull factor. Yet, they also seek broader security, which is push factor due to geopolitical complexities, economic instability, and a lack of comprehensive support. The contradiction between safety and security is a central challenge in repatriation. While Armenia provides cultural and personal safety, broader economic and geopolitical uncertainties act as push factors that may drive repatriates away. Addressing these challenges through targeted policies and support systems is essential for ensuring long-term integration and retention of returnees.

2. Language Barrier and Communication Challenges can present a significant obstacle, especially for those who did not grow up in an Armenian-speaking environment. Communication challenges may lead to a sense of isolation, hindering effective integration and contributing to feelings of being disconnected.

“I find it hard to pronounce certain Armenian letters and hence I have a strong Russian accent. It makes me feel self-conscious.” (female, 37 years old).

3. Struggle with Identity and Values. Individuals who grew up in non-Armenian environments might experience a struggle with their identity and values, feeling torn

between the cultural influences of their birthplace and the desire to reconnect with Armenian roots. This internal conflict can act as a push factor.

"I have two homes: Ukraine and Armenia. Even if I stem from here, the majority of my conscious life was spent there, and I miss the other "home," whether I am In Armenia or in Ukraine." (male, 25 years old).

The two primary adaptation strategies can be categorized as "adaptation based on integration" and "adaptation based on psychological defense or isolation." Some Armenians make concerted efforts to connect or reconnect with fellow Armenians, relatives, and to build networks. Meanwhile, there are individuals who distance themselves from the local community, interacting exclusively with other Russian or Ukrainian relocants. Moreover, their sense of self-worth is influenced not only by their professional success but also by their adaptation process.

4. The Sense of Not Being Valued by the Government. As some interviewees mentioned, challenge lies in the government's understanding of the value of repatriates, inhibiting the development of their ideas and innovations.

"I think the government doesn't really value the worth of repatriates in Armenia, especially those who really want to do something for their country, but it turns vice versa, you are more limited here." (female, 44 years old).

"I came here for a better life here and to finally get peace of mind. Still, I can't have a clear vision on what I will do next." (male, 28 years old).

5. Cultural Adjustment and Differences in Mentalities. Armenians raised in non-Armenian communities in Russia or Ukraine may face challenges in adapting to the cultural nuances and mentalities prevalent in Armenia. Differences in ways of thinking and value systems could lead to a sense of alienation or feeling out of place.

"Growing up in Ukraine, in most of the cases, I have a different viewpoint, for which many people tend to judge me. People here live with each other's lives." (female, 37 years old).

6. Limited Infrastructure and Services. The current state of infrastructure and public services in Armenia are considered as insufficient by some repatriates. Concerns refer to the access to quality education, transportation, digitalization of services, etc.

"Transport causes discomfort, sometimes I get mad that it's not like in Ukraine". (male, 38 years old).

"In Ukraine, everything was more automated, for instance queues, payments. But here some payments are still in cash and you need to prepare the amount in advance to pay through easy pay. On the other hand, such issues encourage to look for ways to improve the quality of life in Armenia, and create on our own if something is missing. Armenia is not a bad field of business opportunities." (male, 25 years old).

7. Limited Opportunities for Professional Growth. Some individuals perceive limited opportunities for achieving greater advancement and development.

"My child is a football player and he has big goals, but I'm a bit afraid about the lack of the proper conditions for his professional growth here." (female, 37 years old).

Conclusion and discussion

The findings of this study highlight the intricate dynamics influencing the repatriation of Armenians from Russia and Ukraine, shedding light on the interplay between push and pull factors. The decision to return to Armenia is shaped by both external circumstances and deeply personal motivations, reflecting a complex migration landscape.

One of the most significant findings emerging from the analysis is the role of security concerns as both a push and pull factor. The ongoing Russia-Ukraine war has prompted many Armenians to leave due to instability, fear of mobilization, conscription, and economic downturns in their host countries. Simultaneously, Armenia is perceived as a relatively safer environment, particularly for those who have deep-rooted cultural and familial ties. However, the geopolitical tensions in the region, particularly Armenia's own security challenges following the Artsakh conflict, create an ambivalent scenario for repatriates, as concerns over future instability persist. Furthermore, the geopolitical situation in general is also a restraining factor preventing their further mobility. The question 'Where to go?' has no ambiguous answer. This dichotomy manifests itself and becomes a serious safety concern.

Economic factors also play a crucial role in repatriation decisions. The study reveals that worsening economic conditions in Russia, exacerbated by international sanctions and currency devaluation, have motivated many Armenians to seek opportunities elsewhere. In contrast, some returnees view Armenia as a place where they can contribute meaningfully, especially in entrepreneurial ventures. However, concerns over limited professional growth, inadequate infrastructure, and lower salaries in Armenia remain significant deterrents. This paradox highlights the need for targeted economic policies to support repatriates in securing stable employment, fostering business initiatives, and filling labor gaps in key economic sectors.

Psychological and sociocultural dimensions of repatriation are equally critical. The study underscores that many Armenians returning to their homeland experience a strong emotional pull, fueled by a sense of belonging and national identity. Repatriates often cite the comfort of a familiar culture, shared language, and the presence of an Armenian community as key motivators for their decision. However, for those who have spent most of their lives in Russia or Ukraine, the adaptation process can be challenging, particularly due to differences in mentality, bureaucratic hurdles, and occasional societal resistance to newcomers. These findings align with previous research emphasizing the need for effective integration policies that address linguistic, cultural, and social barriers faced by returnees. Stereotypes within the host society create significant barriers for integration and economic participation, potentially acting as a push factor for repatriates if efforts to promote tolerance and inclusivity are insufficient. Preconceived notions about newcomers may lead to discrimination in employment, housing, and social interactions, making it more difficult for repatriates to establish themselves.

Ultimately, the study highlights the dual nature of repatriation as both an opportunity and a challenge. While many Armenians are drawn back to their homeland by cultural, social, and security-related motivations, structural deficiencies in Armenia's economic and political landscape may lead some to consider re-emigration.

These findings call for a holistic approach to repatriation policy—one that not only facilitates return but also ensures the long-term retention and well-being of repatriates. Policymakers must develop targeted strategies that enhance economic prospects, strengthen social integration mechanisms, and improve overall infrastructure to maximize the benefits of repatriation for both individuals and Armenian society as a whole.

Repatriation involves a process of successful adaptation for newcomers, which presents a significant socio-psychological challenge upon arrival. This challenge serves as a threshold that migrants must navigate, while the receiving society must also adjust to accommodate them. Successful adaptation requires a mutual process where both returnees and the host society work toward restoring a sense of safety, security, and belonging.

The repatriation of Armenians in the aftermath of the Ukrainian conflict is a multifaceted process. According to some authors, there are two distinct adaptation strategies: successful adaptation, also known as ‘adaptation based on integration’, and unsuccessful adaptation, referred to as ‘adaptation based on psychological defense or isolation’. This dichotomy is illustrated by the fact that some Armenians actively seek to connect or reconnect with their compatriots, relatives, make networks, and embrace more of the local traditions. Conversely, there are people who choose to isolate themselves from the local community, exclusively interact with other circles of Russian or Ukrainian relocants, and may perceive themselves as outsiders, potentially considering a return to the country they have moved from when conditions improve there. Not only does the newcomers’ successful work activity matter, but the absence of significant distortions in their self-perception and self-esteem also depends on the success of the adaptation process. Key factors influencing adaptation include the chosen occupation, language proficiency, the presence of relatives or friends in the host country, the sense of belonging, the constant ties with their homeland and have social and economic capital here.

Here, the dichotomy between safety and security emerges as a central issue. As the pull factors of repatriation are rooted in the notion of safety, the homeland becomes a place where individuals seek to find stability by returning to the familiar, the comfort, experiencing the sense of belonging. Meantime, the push factors often stem from a yearning for broader security. Safety, in the context of returning to one’s roots, encompasses the emotional and psychological dimensions of finding safety and comfort. However, security involves a broader protective shield against external threats and challenges, which is challenging to attain within the complex geopolitical context, economic instability and lack of a wholesome support mechanism.

The hard push factors, mostly originating from the military conflicts in Ukraine and Russia, accompanied by humanitarian crises gives rise to fear and anxiety, compelling individuals to seek safer environments. Meanwhile, push factors such as security concerns, economic challenges, patchy repatriation initiatives, limited infrastructures and professional growth may prompt some repatriates to emigrate again, this time, from Armenia.

Recognizing the significance of improving push factors in Armenia is crucial for facilitating successful long-term repatriation. These individuals have already faced

despair and crises due to the Ukrainian war, experiencing all its negative impacts. Therefore, it is imperative to create a safe and secure environment, within opportunities for growth and development. Beyond economic factors, social and psychological support mechanisms are essential for ensuring the well-being of returnees. Finally, infrastructure and urban development remain critical for enhancing quality of life.

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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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LEGITIMACY BEYOND PERFORMANCE: TRUST, ACCOUNTABILITY, AND EXECUTIVE AUTHORITY IN TRANSITIONAL REGIMES

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Abstract

The article analyzes the issues of institutional legitimacy in transitional regimes, the effective solutions of which depend not only on the stability of the political system, but also on the level of technical performance. This article examines how the legitimacy of the executive branch is formed through the complex interaction between institutional effectiveness and perceived effectiveness. Based on legitimacy theory and comparative analysis methodology, the article concludes that the performance-legitimacy relationship is mediated by three important factors: trust, accountability, and communication. Despite the governance reforms implemented in the political system of the Republic of Armenia after 2018, including the Open Government Partnership initiatives and anti-corruption measures, legitimacy remains fragile when the above-mentioned mediating factors are weak. The article uses comparative cases from Georgia, France, Sweden, and the United Kingdom to reveal how institutional cultures and political events mediate the effectiveness-legitimacy nexus, pointing to comprehensive governance strategies focused on legitimacy for transitional states.

Keywords: *legitimacy, trust, accountability, Armenia, transitional regimes, executive power, institutional effectiveness, Open Government Partnership.*

The Crisis of Executive Legitimacy in Transitional States

In many contemporary states, especially in transitional and semi-democratic systems, the executive branch faces a fundamental paradox that strikes at the heart of democratic consolidation and state stability. Despite measurable improvements in institutional capacity, administrative competence, and policy delivery, public trust in government remains fragile, volatile, or actively declining. This disconnect between governance output and legitimacy poses profound questions for reformers, policymakers, and citizens who invested hope in political transformation but find themselves disappointed by its outcomes (Hilbrich 2024; Norris 2011).

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Legitimacy, as we employ the term here, refers to the normative belief that a ruler or institution possesses the right authority to govern and that citizens have corresponding obligations to obey (Beetham 1991; Stehle, Lührmann and Uth 2025). True legitimacy involves an internalized acceptance that power is exercised appropriately, fairly, and in ways that respect both procedural norms and substantive values. When legitimacy is strong, citizens obey it not because they fear punishment or expect rewards, but because they believe obedience is right. When legitimacy is weak or absent, even technically proficient governments struggle to govern effectively, as every policy initiative encounters resistance, evasion, or indifference.

The critical insight that motivates this article is that legitimacy cannot rest solely on performance outcomes or technocratic efficiency. A government may deliver excellent public services, maintain fiscal discipline, and achieve impressive development indicators while still failing to secure robust legitimacy. This is because legitimacy depends equally—perhaps primarily—on how citizens perceive, interpret, and internalize state action within their lived political reality. The gap between objective institutional performance and subjective legitimacy perceptions represents one of the central challenges for governance in the twenty-first century, particularly in states undergoing political and economic transformation (Hilbrich 2024).

Armenia offers a particularly compelling case for examining this paradox. The Velvet Revolution of April-May 2018 peacefully removed the long-standing Republican Party from power through massive street protests led by opposition politician Nikol Pashinyan. The new government quickly embarked on an ambitious reform trajectory, launching numerous initiatives to professionalize the executive apparatus, inject transparency into government operations, combat endemic corruption, and enhance citizen participation in policy processes (Ishkanian 2015; Broers 2019). Yet despite these institutional advances, popular trust in government institutions has remained fragile and subject to sharp fluctuations, shaped by persistent legacies of Soviet-era governance cultures, endemic corruption, weak horizontal accountability, and most dramatically, the catastrophic 2020 Nagorno-Karabakh war with Azerbaijan (Grigoryan and Khachatryan 2020; Nikoghosyan and Ter-Matevosyan 2023).

This article addresses these questions by developing a theoretical framework that distinguishes between institutional effectiveness (objective state performance) and perceived effectiveness (citizen judgments about performance), and by identifying three critical mediating factors that link the two: trust, accountability, and communication. We argue that the relationship between executive effectiveness and legitimacy is not direct but rather operates through these mediating channels. The article proceeds through six integrated sections that build this argument systematically, concluding with concrete policy pathways for strengthening legitimacy in transitional contexts.

Building on the central argument outlined above, this article adopts a qualitative, theory-driven, and comparative methodological approach to investigate how institutional performance translates into executive legitimacy — or fails to do so — in transitional political systems. The analysis is structured around a dual objective: first, to refine the conceptual understanding of legitimacy by distinguishing between

institutional and perceived effectiveness; and second, to empirically trace how this distinction manifests in the Armenian case and comparable contexts.

The study uses a comparative case study design, which is well suited for identifying causal mechanisms and contextual factors shaping legitimacy dynamics. Armenia serves as the primary case because of its post-2018 revolutionary transformation, ambitious governance reforms, and persistent legitimacy challenges. To provide analytical depth and external validity, Armenia's trajectory is contrasted with several secondary cases — including Georgia, France, Sweden, and the United Kingdom — which represent diverse regime types, institutional capacities, and political-cultural contexts.

Empirical evidence is derived from a wide range of secondary sources, including peer-reviewed scholarship, policy analyses, governance indicators (such as the World Bank's Worldwide Governance Indicators and Transparency International's Corruption Perceptions Index), official government documents, Open Government Partnership reports, and public opinion surveys. These materials are supplemented by qualitative assessments of media discourse and government communication strategies. By integrating theoretical synthesis with structured comparative analysis, the methodology enables a comprehensive exploration of how mediating mechanisms — trust, accountability, and communication — shape the translation of state performance into perceived legitimacy.

Theoretical Framework: From Classical Theory to Institutional vs. Perceived Effectiveness

The modern study of political legitimacy has evolved considerably from its classical foundations. Max Weber's foundational typology identified three ideal types of legitimate authority: traditional (based on inherited status), charismatic (based on exceptional personal qualities), and rational-legal (based on impersonal rules and procedures). Weber's framework emphasized that legitimacy is fundamentally about belief rather than material interest or coercion. However, his categories have been criticized for their static quality and limited applicability to hybrid or transitional regimes that combine elements of multiple legitimation strategies (Ignác 2024).

Seymour M. Lipset extended legitimacy analysis by explicitly linking it to regime stability and economic performance, establishing what would become a persistent theme in legitimacy research: the performance-legitimacy connection. However, Lipset's framework was criticized for overemphasizing stability and consensus while underplaying how legitimacy is contested and how democracies can maintain legitimacy even during poor performance (Viviani 2024). David Easton's systems theory introduced a crucial distinction between specific support (satisfaction with policies or leaders) and diffuse support (generalized attachment to the political system), helping explain how democratic regimes can maintain legitimacy even when citizens are disappointed with specific governments or policies (Bang 2020).

David Beetham's seminal work *The Legitimacy of Power* (1991) fundamentally challenged performance-centered conceptions by arguing that legitimate authority requires three distinct criteria: conformity to established rules (legality), justifiability of rules according to shared beliefs (normative validity), and evidence of consent through

actions expressing acceptance. Crucially, Beetham demonstrated that effectiveness or performance is neither necessary nor sufficient for legitimacy. A regime can be highly effective but illegitimate, or ineffective but legitimate. This framework proved particularly influential for analyzing transitional contexts, where new democratic institutions might struggle with performance but could draw legitimacy from their normative superiority over authoritarian predecessors.

Recent scholars have expanded legitimacy analysis in several important directions. Fritz Scharpf's (1999) influential distinction between input legitimacy (derived from democratic participation), throughput legitimacy (based on quality of governance processes), and output legitimacy (grounded in policy effectiveness) has become standard in analyzing complex governance systems. Tom Tyler's research on procedural justice theory demonstrates that people are more likely to view authorities as legitimate when they perceive fair treatment and respectful processes, even when outcomes are unfavorable (Stehle, Lührmann and Uth 2025). This has profound implications for understanding legitimacy in contexts of scarcity or limited state capacity. Recent studies have also examined legitimacy in the context of new governance challenges posed by digitalization (Mazepus, Veenendaal, McCarthy-Jones and Trak Vásquez 2016; Erkkilä 2014), multi-level governance systems (Alica and Schakel 2025), and the role of communication and narrative in legitimacy construction (Stehle, Lührmann and Uth 2025; Iazzolino and Stremlau 2019).

Post-Soviet states present distinctive legitimacy challenges. The collapse of Soviet legitimacy formulas created profound legitimacy vacuums that new independent states struggled to fill (Fish 1995; Egamberdiev, Bobojonov and Kuhn 2025). Weak state capacity, economic dislocation during transition, persistent corruption, and manipulation of democratic forms while maintaining authoritarian practices undermined confidence in democratic institutions. In this context, many post-Soviet regimes pursued hybrid legitimization strategies combining democratic rhetoric with authoritarian governance, appeals to national identity, and promises of economic development (Levitsky and Way 2010; Gel'man 2015).

Institutional vs. Perceived Effectiveness: The Core Distinction

To understand the legitimacy paradox in transitional states, we must distinguish carefully between institutional effectiveness and perceived effectiveness. Institutional effectiveness refers to the objective, measurable performance of state institutions in fulfilling their designated functions—policy implementation capacity, administrative competence, resource management efficiency, regulatory quality, and effective provision of public goods and services (Tu 2025; Fukuyama 2013). This can be measured through budget execution rates, service delivery statistics, infrastructure quality metrics, corruption indices, and expert evaluations such as the World Bank's Worldwide Governance Indicators.

Perceived effectiveness represents something fundamentally different. It refers to citizens' subjective judgments about whether and how well state institutions are performing, judgments shaped by multiple factors extend well beyond objective performance metrics. Direct personal experience with government services powerfully shapes individual assessments, precisely because vivid experiences often dominate

perception formation even when unrepresentative of overall system performance. Beyond direct experience, perceived effectiveness is heavily influenced by information circulated through social networks, where people trust personal sources more than official communications and negative stories spread more readily than positive ones (Levi and Stoker 2000). Media framing plays an equally crucial role in constructing public understanding of government performance (Dancy and Thoms 2025).

Perceived effectiveness also depends heavily on historical comparisons and counterfactual expectations. Citizens do not evaluate current performance in a vacuum but rather against memories of how things used to be and beliefs about how they could or should be. In post-Soviet contexts, older citizens may compare current conditions to mythologized memories of Soviet stability, while younger citizens compare them to idealized Western standards (Marsh 2025; Levitsky and Way 2010). When expectations exceed capacity, whether those expectations are realistic or not—dissatisfaction results even when objective performance is good.

Critically, perceived effectiveness incorporates normative dimensions that may not appear in technical performance metrics. Citizens care deeply about whether processes and outcomes are perceived as fair, whether they are treated respectfully by officials, and whether marginalized groups are included in benefits and decision-making (Stehle, Lührmann and Uth 2025). A government program may be technically efficient but still fail on perceived effectiveness if it distributes benefits unfairly or implements policies disrespectfully. This symbolic dimension of effectiveness, while difficult to quantify, is constitutive of good governance rather than epiphenomenal to it.

The gap between institutional and perceived effectiveness creates the performance-legitimacy paradox observed across transitional states. This gap arises from information asymmetries, attribution problems (where citizens credit external factors rather than government competence), rising expectations that outpace capacity improvements, temporal misalignment between slow institutional reforms and rapid legitimacy crises, distributional conflicts where concentrated losers mobilize against broadly beneficial reforms, and legacy effects from historical patterns creating deep skepticism that persists even after genuine reforms (Rose and Mishler 2010; Marsh 2025; Mao, Lu and Sullivan 2023).

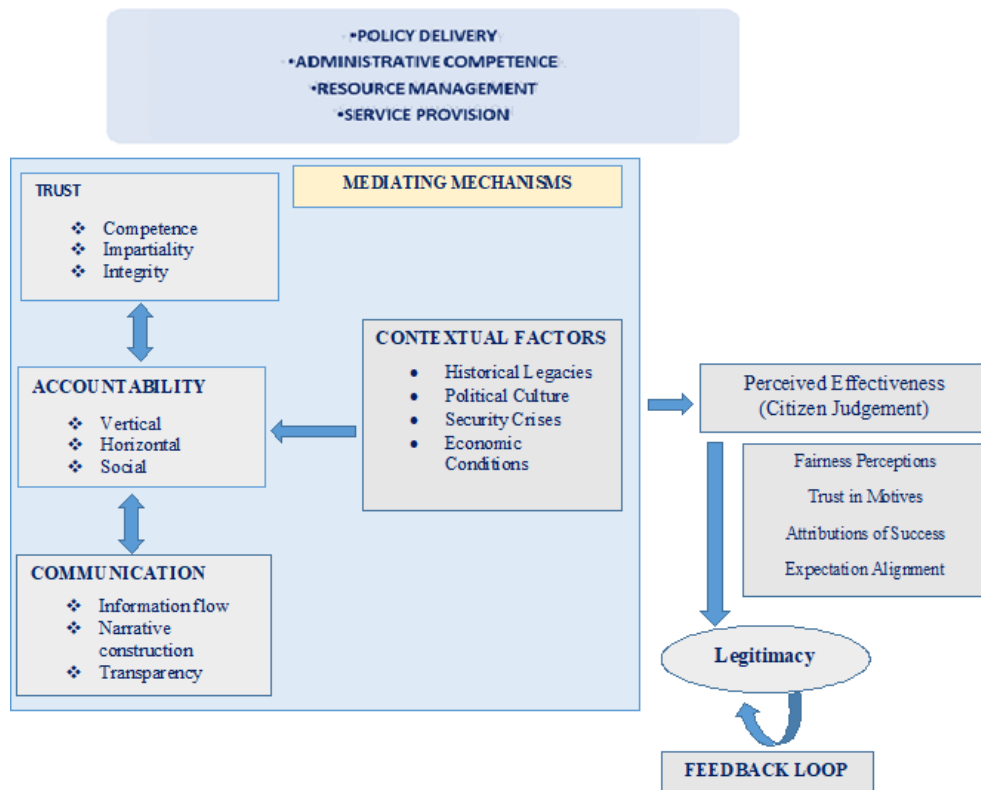
Figure 1. Conceptual Model: The Performance-Legitimacy Nexus

Figure 1 shows that this model illustrates how institutional effectiveness does not automatically translate into legitimacy, but must pass through three mediating mechanisms—trust, accountability, and communication—which are in turn shaped by contextual factors. The perceived effectiveness that results from this mediation process then forms the basis for legitimacy judgments (see Figure 1). Importantly, legitimacy (or its absence) feeds back to affect both institutional effectiveness and the mediating mechanisms themselves, creating either virtuous or vicious cycles.

Mediating Factors and Legitimacy Dynamics: Trust, Accountability, Communication, and When Performance Fails

The translation from institutional effectiveness to perceived effectiveness, and ultimately to legitimacy, is mediated by three critical factors that constitute the relational and interpretive infrastructure through which state performance becomes meaningful to citizens. These factors—trust, accountability, and communication—are not simply additional variables but represent fundamental dimensions of the state-citizen relationship that either enable or obstruct legitimacy formation.

Trust: The Relational Foundation

Trust represents the core relational foundation between state and citizen, the essential precondition for legitimacy in any political system. Political trust operates through two distinct but interconnected mechanisms: as rational calculation (citizens forming expectations about whether government will perform competently) and as a social relationship based on shared values and emotional bonds that transcend simple calculation (Levi and Stoker 2000). Political trust operates at multiple levels that shape legitimacy differently: personal trust in specific leaders (most volatile), institutional trust in particular government bodies (more stable), regime trust in the fundamental political system (changes slowly), and systemic trust representing broader confidence in the political community's capacity for collective action (Dancy and Thoms 2025).

Research has identified several mechanisms through which governments can build political trust in transitional contexts (Ali, Verma and Hamdan 2025). Consistent competence in delivering promised services builds confidence over time. Impartiality in treating all citizens regardless of political affiliation proves especially important—when citizens believe government plays favorites, trust collapses even when government performs well for preferred constituencies.

Transparency through open access to information enables citizen monitoring and reduces suspicion. Responsiveness demonstrates that government listens to citizen concerns. Integrity involves visible commitment to ethical standards and genuine accountability when officials violate norms. Finally, consistency in behavior creates predictability that allows citizens to plan and reduces uncertainty about government intentions.

In transitional contexts like Armenia, trust-building faces distinctive challenges rooted in historical legacies. Soviet-era governance deliberately cultivated generalized distrust of official institutions, teaching citizens that public pronouncements were propaganda, that success required informal connections, and that state institutions served party elites rather than ordinary people (Rose and Mishler 2010; Marsh 2025). Endemic corruption in the post-independence period reinforced expectations that officials inevitably serve private interests. Overcoming these legacy effects requires sustained, visible commitment to trust-building mechanisms over extended periods sufficient for citizens to unlearn old lessons and internalize new patterns.

Accountability: The Institutional Scaffolding

If trust represents the relational foundation of legitimacy, accountability provides its institutional scaffolding—the structural mechanisms ensuring that powerholders face consequences for their actions and must justify decisions to citizens and other institutions. Without accountability, even initially high trust will erode as power concentrates and officials escape consequences for failures or abuses (Boos 2024; Leotta, Rizza, Ruggeri and Messina 2025).

Accountability takes multiple forms that operate through different channels. Vertical accountability flows through electoral mechanisms allowing citizens to reward or punish governments. However, elections alone are insufficient. Horizontal accountability operates through checks and balances between co-equal branches of

government. Effective horizontal accountability requires genuine institutional independence, adequate resources, and political culture supporting oversight rather than collusion. Social accountability involves oversight by civil society organizations, media, and citizen groups who monitor government and mobilize public pressure for reform (Smulovitz and Peruzzotti 2000). Diagonal accountability combines elements through mechanisms like participatory budgeting and public hearings, enabling direct citizen-state interaction. Finally, upward accountability refers to obligations toward international organizations, particularly relevant in aid-dependent transitional states.

Effective accountability systems typically combine multiple dimensions rather than relying on any single mechanism, creating redundancy that ensures abuses are more likely to be detected even when some channels fail. However, accountability systems can also malfunction—excessive requirements can paralyze decision-making, mechanisms can be weaponized for partisan advantage, and accountability without capacity for responding to identified problems generates cynicism rather than confidence.

Communication: The Interpretive Framework

The third mediating factor—strategic communication—has received less systematic attention than trust or accountability but proves increasingly crucial in contemporary governance contexts (Stehle, Lührmann and Uth 2025). Government communication influences citizens' views of state performance and legitimacy.

Government communication serves several distinct functions relevant for legitimacy. Information provision ensures citizens have accurate knowledge about government activities.

Expectation management helps citizens develop realistic understandings of what government can accomplish within constraints—politically difficult because it requires admitting limitations rather than promising miracles, but essential for sustainable legitimacy. Narrative construction involves building coherent stories about government purpose and trajectory that resonate with citizen identities. Process explanation makes transparent the decision-making procedures behind policies. Achievement recognition ensures genuine accomplishments become visible rather than invisible or credited to others. Finally, problem acknowledgment through openly admitting failures builds credibility more effectively than defensive denial.

Effective government communication in transitional contexts faces formidable obstacles. Credibility deficits from decades of propaganda make citizens skeptical of all official communications. Media fragmentation makes consistent messaging difficult. Digital divides create sharp disparities in access. Political polarization means identical messages are interpreted through radically different partisan filters. Capacity constraints mean governments often lack professional communications staff or strategic planning capacity. These obstacles require deliberate strategy, adequate resources, and sustained commitment to communication as a core governance function.

Trust, accountability, and communication do not operate independently but interact in complex ways. Trust enables accountability by making citizens willing to engage with accountability mechanisms. Accountability builds trust by demonstrating that institutions function as promised. Communication facilitates both by making

government actions transparent and meaningful. These positive interactions can create virtuous cycles, but negative feedback loops are equally possible and often more powerful, creating vicious cycles where trust, accountability, and communication simultaneously deteriorate, producing cascading legitimacy collapse.

When Performance Fails to Produce Legitimacy

Understanding why and when institutional performance improvements fail to generate enhanced legitimacy reveals several common failure modes essential for designing effective interventions. The efficiency trap occurs where states achieve high technical competence while remaining fundamentally illegitimate because they lack democratic accountability or respect for rights. Authoritarian developmental states like Singapore illustrate how performance-based legitimation has limits—citizens may value prosperity but simultaneously desire political voice and dignity (Ignácz 2024). This pattern manifests in transitional states when reforming governments emphasize technocratic competence while neglecting political inclusion.

Attribution problems occur when institutional improvements are incorrectly attributed to factors other than government competence—external aid, economic booms, or international interventions—preventing performance from translating into legitimacy (Knack 2001). Citizens may credit foreign donors or luck rather than domestic government. Politicians in resource-rich countries face asymmetric attribution where government receives credit for nothing positive but blame for everything negative.

Overcoming attribution problems requires deliberate communication strategies, but such communication faces credibility challenges because it appears self-serving.

The expectation spiral creates perverse dynamics where objectively better performance produces lower satisfaction because subjective expectations outpace objective achievements (Pietsch 2025; Mao, Lu and Sullivan 2023). The government that reduces corruption from endemic to merely serious faces citizens who expected complete elimination. This is particularly acute in post-revolutionary contexts where publics expect rapid transformation. Managing expectation spirals requires careful communication about realistic timelines and honest acknowledgment of constraints, which conflicts with political incentives to promise dramatic change.

Distribution dilemmas arise when broadly beneficial policies generate negative perceptions because costs are concentrated while benefits are diffuse. Economic reforms may devastate industries while raising average incomes. Concentrated losers organize effectively to protest while diffuse beneficiaries often remain unaware or fail to organize politically. This creates systematic bias where government hears primarily from those harmed by reforms. Navigating distribution dilemmas requires compensation schemes, reform sequencing, and communication strategies, though none offer simple solutions.

Finally, trust deficits rooted in historical patterns create situations where citizens simply do not believe government claims about improved performance, even when supported by objective evidence (Rose and Mishler 2010; Marsh 2025). Deep skepticism produces automatic discounting of official communications. Overcoming deep trust deficits requires sustained demonstration of integrity over extended

periods—extraordinarily challenging because it demands patience precisely when governments face immediate crises and any failures during trust-building reinforce rather than challenge skeptical priors.

These failure modes demonstrate that legitimacy rests on more than performance outcomes, directing attention to alternative or complementary legitimacy sources. Procedural legitimacy derived from fair, inclusive, and transparent processes proves particularly important during crises when governments cannot deliver desired substantive outcomes (Stehle, Lührmann and Uth 2025; Saracino 2024). Identity-based legitimacy from symbolic representation of national values can sustain governments through difficult transitions but carries risks of exclusion and nationalism. Legal-constitutional legitimacy based on adherence to constitutional principles establishes authority independent of policy performance (Beetham 1991). Paradoxically, legitimacy can be strengthened through demonstrated tolerance for opposition and dissent, signaling confidence and respect for democratic norms.

Armenia's Post-Revolutionary Legitimacy Quest

Armenia's experience since the 2018 Velvet Revolution provides rich empirical material for examining how transitional states struggle to translate institutional reforms into robust legitimacy, illustrating with clarity the dynamics discussed theoretically above.

The historical context shaping Armenia's legitimacy challenges reaches back through the Soviet period and turbulent post-independence decades. Soviet governance cultivated specific pathologies that persist despite regime change—clientelism rooted in personalistic networks, suspicion of formal institutions understood as facades for real power operating behind scenes, and expectations that success requires informal connections rather than following official channels (Ishkanian 2008). These deeply internalized patterns did not disappear with Soviet collapse but intensified during chaotic transitions. Post1991 independence brought cascading crises: economic collapse, the Nagorno-Karabakh war, energy crises, and mass emigration that demonstrated widespread lack of confidence in Armenia's future.

Early democratic experiments gave way increasingly to authoritarian consolidation. The regimes maintained democratic in forms but actual governance was characterized by electoral manipulation, endemic corruption, oligarchic capture, and selective repression (Broers 2005; APRI Institute 2025). By 2018, this hybrid regime had delivered modest economic growth but was widely perceived as fundamentally corrupt, serving elite interests while offering ordinary citizens few pathways for success (Transparency International 2018, 2024).

The Velvet Revolution emerged from this legitimacy exhaustion. In spring 2018, Sargsyan's attempt to extend his rule triggered massive street protests. The notably peaceful transition distinguished Armenia's revolution from violent upheavals elsewhere and generated enormous optimism (Broers 2021). Pashinyan embodied rupture with the old elite, emphasizing fighting corruption, establishing rule of law, and enabling merit-based success. Parliamentary elections in December 2018 gave his party an overwhelming majority, providing democratic mandate for reforms.

The post-revolutionary government moved quickly to implement institutional reforms addressing the most visible legitimacy deficits. Armenia had joined the Open Government Partnership in 2011, but implementation was superficial. The new government developed ambitious action plans dramatically expanding accessible government data through enhanced data.gov.am portal, increased budget transparency, improved legislative transparency through live streaming and draft law publication, and expanded e-governance initiatives (Armenia OGP Action Plans, 2018-2020; 2020-2022). These initiatives represented genuine institutional improvements measurable through international assessments.

Anti-corruption efforts targeted what had been the most resented aspect of the previous regime. The government launched a beneficial ownership register exposing ultimate company owners, strengthened asset declaration requirements, empowered the Anti-Corruption Committee with increased independence and resources, initiated judicial reform through vetting procedures, and emphasized electronic procurement systems (Transparency International Armenia 2024; BTI 2024). These reforms produced some notable symbolic victories including investigations of formerly untouchable officials, but implementation proved uneven.

Participatory governance mechanisms represented efforts to build legitimacy through inclusion. Participatory budgeting was piloted in several municipalities, public consultation requirements expanded, and citizen assemblies were convened on specific issues (Paturyan and Melkonyan 2024). However, these initiatives remained limited in scope and often lacked resources or genuine commitment necessary for meaningful impact.

Despite these institutional improvements, the post-2018 government struggled with persistent legitimacy challenges. Political polarization intensified rather than healed, with supporters viewing Pashinyan as a democratic hero and opponents seeing him as a dangerous populist (Nikoghosyan and Ter-Matevosyan 2023; Caucasus Watch 2025). This polarization meant identical government actions were interpreted through radically opposed frames—supporters saw heroic reform while opponents saw selective prosecution and performative gestures.

The 2020 Nagorno-Karabakh war proved catastrophic for government legitimacy in ways that completely overshadowed governance reforms. The 44-day war resulted in military defeat, approximately 4,000 casualties, and humiliating territorial losses (Grigoryan and Khachatryan 2020). This security failure created an immediate legitimacy crisis despite having little connection to domestic governance reforms. The war shifted political discourse almost entirely from governance questions to existential survival debates, making economic development and anti-corruption seem secondary or irrelevant.

Capacity constraints and implementation gaps created growing divergence between reform rhetoric and lived reality (Broers 2021). The beneficial ownership register looked impressive on paper but produced few concrete results because using it effectively required sophisticated capacities that did not exist. Participatory budgeting covered only tiny fractions of spending. E-governance platforms sometimes functioned poorly. These gaps created cognitive dissonance for citizens encountering familiar dysfunction despite constant reform rhetoric.

Communication failures compounded these problems. The government struggled to effectively communicate achievements, explain constraints, or build narratives resonating beyond core supporters (Ishkanian 2015). Pashinyan's combative rhetoric often alienated opponents. Complex reforms were poorly translated into accessible narratives. Opposition media effectively spread counter-narratives. The fragmented information environment meant government communication reached primarily those already supportive.

Elite resistance and institutional capture limited reform implementation despite revolutionary rhetoric. The revolution removed top political leadership but left much administrative apparatus intact with many bureaucrats having stakes in existing systems. Business elites retained economic power and resisted threatening reforms. The judiciary remained problematic. This partial capture created a 'captured state' where revolutionary governments controlled formal authority, but inherited infrastructure continued operating according to old logic.

Socioeconomic challenges shaped legitimacy perceptions regardless of governance reforms. Many citizens faced continued economic hardship, limited employment opportunities, and stagnant wages. Youth emigration continued at alarming rates. These material conditions created perception that government was out of touch with ordinary people's needs and receptivity to opposition narratives blaming government for hardship.

Comparative Insights

Georgia's Rose Revolution provides instructive parallels. Like Armenia, Georgia experienced peaceful regime change and emphasized anti-corruption reforms. Georgia achieved notable successes reducing petty corruption through radical restructuring (Kukhianidze 2009), generating genuine legitimacy returns from visible improvements. However, the Saakashvili government was criticized for authoritarian tendencies, and the 2008 war with Russia created security failure undermining legitimacy despite domestic achievements (Gel'man 2015). Georgia's trajectory suggests performance improvements in some domains cannot compensate for legitimacy deficits in others.

France has experienced recurring legitimacy crises despite being a wealthy democracy with capable institutions. The Yellow Vest movement revealed that when citizens feel unheard or disrespected, legitimacy can erode regardless of technical governance quality (Abrial, Alexandre, Bedock et al. 2022; Yildiz 2024). Sweden represents a case where strong performance has historically translated into robust legitimacy because of complementary strengths in trust, accountability, and communication built over generations (Ali, Verma and Hamdan 2025). The UK's Brexit experience demonstrates how misleading narratives can override objective performance assessments and that legitimacy requires ongoing cultivation even in established democracies (Jin 2025).

These comparisons reinforce that institutional performance improvements are necessary but insufficient for legitimacy, that trust built over long periods provides resilience, that communication profoundly shapes how performance is perceived, and that legitimacy requires attention to multiple dimensions simultaneously. For Armenia, while institutional reforms were necessary and valuable, they were never sufficient

given weak trust, limited accountability, poor communication, and catastrophic security failure.

Integrated Strategies: Measurement and Policy Pathways for Strengthening Legitimacy

Effective strategies for strengthening legitimacy require both robust measurement approaches and comprehensive policy interventions that address institutional effectiveness, perceived effectiveness, and the mediating mechanisms linking them.

Measuring institutional effectiveness requires combining multiple data sources capturing different performance dimensions. Governance indicators like the World Bank's Worldwide Governance Indicators provide comparative assessments, though they should be complemented by more specific metrics tailored to national contexts (Kaufmann, Kraay and Mastruzzi 2011). Administrative data on service delivery provides concrete evidence—education metrics, healthcare data, infrastructure measures, and public financial management indicators reveal whether institutions function effectively. Process indicators documenting whether institutions follow proper procedures capture dimensions crucial for legitimacy but not reflected in outcome metric legislative transparency, procurement transparency, judicial independence, and anti-corruption measures.

Measuring perceived effectiveness requires systematic collection of citizen perception data. Large-scale representative surveys remain the primary tool, including both evaluative questions about satisfaction and normative questions about rightful authority. Longitudinal tracking reveals trends and allows assessment of intervention effects. However, surveys have limitations requiring complementary methods. Focus groups and in-depth interviews provide richer qualitative understanding of how citizens think about government and what shapes legitimate judgments. Ethnographic observation documents actual experiences shaping perceptions. Media content analysis and social media monitoring provide additional windows into public discourse, though requiring careful interpretation because these sources are not representative and can be manipulated.

Integrating institutional and perception data requires analytical approaches tracing causal pathways. Structural equation modeling provides techniques for testing theoretical models of how performance, trust, accountability, communication, and perceived effectiveness interact to produce legitimacy. Time-series analysis examines how changes in institutional performance preceded or follow changes in trust and legitimacy. Cross-national comparative analysis identifies universal versus context-dependent relationships. Mixed methods approach combining quantitative and qualitative data provide both breadth and depth of understanding, capturing legitimacy's complexity better than either approach alone.

Practical implementation faces challenges including resource constraints, political sensitivities, and data quality concerns. However, systematic measurement remains essential for evidence-based legitimacy-building strategies. Investment in measurement capacity represents investment in effective governance itself, and when measurement systems are transparent and accessible, they themselves contribute to legitimacy by demonstrating government commitment to evidence-based governance.

Policy Pathways for Strengthening Legitimacy

Strengthening accountability institutions represents a crucial foundation. This requires investing in independent oversight institutions with adequate budgets, professional staff, legal authority, and protection from political interference. Judicial reform to enhance independence, competence, and integrity proves particularly important. Legislative capacity building enables parliaments to effectively oversee executives through professional staff, committee resources, and investigative powers. Civil society strengthening provides crucial social accountability through protecting freedom, facilitating NGO operation, building capacity, and protecting whistleblowers and journalists.

Enhancing transparency and access to information makes government actions visible through comprehensive freedom of information laws, implementation mechanisms, proactive disclosure programs, open data initiatives, and technology platforms. However, transparency requires complementary investments in citizens' capacity to understand and use information through media literacy programs and civic education.

Participatory mechanisms expanding citizen voice can strengthen both accountability and procedural legitimacy. Participatory budgeting with adequate resources and genuine decision-making authority has shown promise when carefully implemented (Baiocchi and Ganuza 2016; Babeck 2025). Public consultation processes should occur early enough to influence decisions and demonstrate how input shaped outcomes. Digital participation platforms must be designed accessibly and complemented by offline engagement.

Building trust through consistent integrity requires sustained commitment to ethical governance. Leadership must set strong ethical tone through personal example. Codes of conduct, asset disclosure, and meritocratic hiring demonstrate fairness while improving capacity. Fair treatment of political opponents and peaceful power transfers show that government operates according to principles. Delivering on commitments builds trust through demonstrated reliability, while realistic promising avoids expectation spirals.

Strategic communication must transform from broadcasting to dialogic engagement incorporating citizen feedback. Professional communications capacity including trained staff, clear strategies, and adequate resources enables effective outreach. Message development should emphasize accessibility, honesty about constraints, and narrative coherence. Multi-channel strategies reach diverse audiences through appropriate media. Feedback mechanisms enable citizens to raise concerns and see responses. Proactive achievement communication makes accomplishments visible while managing expectations.

Managing crises effectively proves crucial because crises test legitimacy most severely. This requires honest, timely communication, transparency about problems, demonstrating competence, showing compassion, and learning from crises. The COVID-19 pandemic illustrated how crisis management profoundly affects legitimacy (Bol, Giani, Blais et al. 2020).

Addressing socioeconomic concerns remains fundamental because material conditions shape legitimacy perceptions. While governments cannot always quickly

transform economic conditions, transparent acknowledgment of challenges, fair distribution of resources, and demonstrable efforts to improve conditions matter as much as absolute performance.

Sequencing and pacing reforms appropriately prevents overload. Identifying high-impact reforms producing visible results relatively quickly can build momentum for longer-term transformations. However, sequencing must balance quick wins against addressing fundamental structural problems. Communicating realistic timelines prevents expectation spirals.

Adapting strategies to context while learning from comparative experience requires balancing universal principles with local realities. Armenia's post-revolutionary context creates distinctive opportunities and constraints. Learning from comparative experience should involve identifying underlying principles rather than mechanically copying institutional designs. Pilot programs allow adaptation based on local experience. Iterative reform processes enable learning and adjustment.

Toward a Legitimacy-Centered Governance Paradigm

This article argued that legitimacy in transitional regimes depends on far more than institutional performance or technical governance capacity. While effective institutions are necessary, they are insufficient for building robust legitimacy that can withstand crises and sustain democratic consolidation. The Armenian case demonstrates clearly the limits of performance-focused reform when trust remains shallow, accountability mechanisms remain weak, and communication fails to make reforms visible and meaningful to citizens. Despite genuine institutional improvements across transparency, anti-corruption, and participation after the 2018 Velvet Revolution, legitimacy remained fragile and vulnerable to shocks including catastrophic security failure.

The theoretical framework developed here distinguishes between institutional effectiveness and perceived effectiveness, showing how the gap between them creates the performance-legitimacy paradox observed across transitional states. Institutional performance does not automatically translate into perceived effectiveness because perception depends on trust, accountability, communication, historical legacies, and contextual factors extending well beyond technical capacity. Three mediating mechanisms prove crucial: trust as the relational foundation between state and citizen, accountability as the institutional scaffolding ensuring responsiveness and consequences, and communication as the interpretive framework through which government action becomes meaningful. These mediators either enable or obstruct the translation from performance to legitimacy.

Understanding when and why performance fails to produce legitimacy reveals several common failure modes. The efficiency trap shows that technical competence without democratic accountability generates incomplete legitimacy. Attribution problems prevent performance improvements from building legitimacy when citizens credit external actors. Expectation spirals create perverse dynamics where better performance produces lower satisfaction because expectations outpace achievements. Distribution dilemmas generate political opposition from concentrated losers even when policies benefit society overall. Deep trust deficits from historical legacies

prevent citizens from believing government claims even with objective evidence. These failure modes suggest that building legitimacy requires simultaneously improving institutional performance while addressing trust, accountability, and communication.

Comparative analysis reveals how institutional cultures, historical trajectories, and political contexts mediate the effectiveness-legitimacy linkage differently across countries. Georgia's post-revolutionary experience shows both the potential for performance-based legitimacy and its limits when security fails, or authoritarianism emerges. France demonstrates that even wealthy established democracies face legitimacy challenges when citizens feel excluded or disrespected despite strong institutional capacity. Sweden illustrates how deep trust built over generations creates virtuous cycles sustaining legitimacy through challenges.

The UK's political volatility shows that legitimacy is never permanently secured and that communication failures can enable populist challenges even in strong institutions. For Armenia, these comparisons suggest that institutional reforms must be complemented by sustained trust-building, accountability strengthening, and communication improvement.

The argument presented here has implications extending beyond Armenia to transitional states globally and even to established democracies facing populist challenges. The performance-legitimacy gap reflects fundamental tensions in modern governance between technical expertise and democratic accountability, between efficiency and inclusion, between elite decision-making and popular sovereignty (Dellmuth and Tallberg 2023). Across diverse contexts, citizens increasingly demand not just effective governance but governance they can trust, hold accountable, and understand. Performance metrics alone cannot capture these multidimensional demands.

This suggests need for a broader paradigm shift in how we think about governance and legitimacy. Rather than treating legitimacy as automatic byproduct of good performance, we should recognize it as distinct governance dimension requiring explicit attention and deliberate cultivation. Rather than assuming technical reforms will naturally generate political support, we should design reforms that simultaneously build capacity and legitimacy. Rather than separating governance effectiveness from political legitimacy as distinct domains, we should integrate them in legitimacy-centered governance approaches attending equally to institutional capacity, trust, accountability, and communication.

Such legitimacy-centered governance has practical implications for policy design and implementation. Reforms should be evaluated not only on technical merit and expected performance improvements but also on legitimacy impacts including effects on trust, implications for accountability, communication feasibility, and distributional consequences. Capacity-building should encompass not just technical skills but also relational skills for trust-building and communicative skills for citizen engagement. Governance indicators should measure legitimacy dimensions alongside performance metrics. International assistance should support legitimacy-building broadly rather than narrow technical reforms. Political leadership should understand legitimacy as strategic priority rather than assuming performance suffices.

For Armenia specifically, moving forward requires learning from post-revolutionary experience while avoiding both uncritical optimism and defeatist pessimism. The institutional reforms undertaken since 2018 represent genuine achievements that should be preserved and deepened rather than abandoned. However, these reforms must be complemented by sustained work on trust-building through demonstrated integrity, accountability-strengthening through functional oversight, and communication improvement to make reforms meaningful. Recovering from the trauma of the 2020 war requires time and cannot be rushed, but governance improvements can contribute to broader national healing by demonstrating government commitment to serving all citizens fairly. Managing ongoing security challenges while pursuing domestic reforms demands difficult balancing but proves necessary for both national survival and democratic consolidation.

More broadly, the Armenian case offers lessons about realistic expectations for transitional governance. Revolutionary moments generate euphoria and unrealistic hopes for rapid transformation, but building legitimate democratic institutions requires decades not years. Setbacks and crises are inevitable and should be expected rather than treated as evidence that reform is impossible. Partial progress is better than none even when falling short of ideals. Comparative perspective shows that all countries, including wealthy established democracies, struggle with legitimacy challenges in different ways—Armenia's struggles are not evidence of unique failure but of common difficulties that transitional states face.

The path forward requires patience, persistence, and realistic assessment of both possibilities and constraints. Legitimacy cannot be achieved overnight or secured permanently but rather must be cultivated continuously through consistent commitment to effective, fair, transparent, responsive, and accountable governance. This cultivation requires attention to multiple dimensions simultaneously improving institutional capacity, building trust through integrity, strengthening accountability through oversight, and communicating effectively with citizens. When governments approach legitimacy with this comprehensive perspective, treating it as central to governance rather than byproduct of performance, they create foundations for democratic consolidation and political stability even amid inevitable challenges and setbacks.

The legitimacy crisis facing executives in many transitional states is profound but not insurmountable. By understanding legitimacy's multidimensional nature, by recognizing the mediating roles of trust, accountability, and communication, by learning from comparative experience while adapting to local contexts, and by pursuing comprehensive strategies addressing performance and perception simultaneously, transitional states can build robust legitimacy sustaining democratic governance through inevitable difficulties ahead. This legitimacy-centered approach offers hope for democratic consolidation in Armenia and beyond, transforming legitimacy from chronic vulnerability into strategic asset supporting effective governance and citizen wellbeing.

Conclusion and discussion

The modern world is characterized by a diversity of forms of social and political organization, which determine unique relationships between those who govern and

those who are governed. The diversity of cultural and civilizational forms determines specific ways of organizing and operating government, distributing authority among state bodies, utilizing electoral procedures specific to these cultural types, and so on. In modern political discourse, the rules and procedures necessary for effective governance are inextricably linked to the concept of legitimacy. Moreover, Western political theory defines legitimacy as the primary criterion for democratic governance and the rule of law, through the prism of which the structure and operation of various mechanisms of interaction between society and the state are assessed. However, even in states that consider themselves developed and democratic, society views politicians, political parties, and political institutions with a fair degree of mistrust. Where once, upon the advent of democratic governments, public support and approval were expected, citizens now question the very foundations of representative democracy, much less the forms and methods of its implementation. At the same time, in some countries, legitimacy is used as a political tool to justify premature changes of government, political regimes, or the pursuit of policies contrary to national interests. The situation is complicated by the fact that no normative act in public international law defines what legitimacy should be. Legitimacy criteria for political institutions such as the head of state, political parties, government bodies, the electoral system, the political elite, and others remain undefined.

The concept of legitimacy is a product of Western political philosophy, which is commonly used as a benchmark in modern political science. However, given the recent challenges outlined above, it is important to take a closer look at the factors and circumstances underlying the development and ideological and theoretical justification of legitimacy concepts by Western scholars. Building on and taking into account the specific features of legitimacy concepts in Western political discourse highlighted in this study, it will be possible to further understand the idea of legitimacy and apply it to the political environment at a new, meaningful level.

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Conflict of interests

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The author affirms this research did not involve human subjects.

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NEW POLITICAL GROWTH POINTS FOR STRATEGIC COOPERATION BETWEEN RUSSIA AND IRAN: SHARING EXPERIENCE OR STRENGTHENING TRUST?

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Abstract

The article analyzes new political dimensions of Russian-Iranian relations, which are in many ways a unique example of interstate cooperation, which is due to the peculiarities of the international political situation and the interests of the two states. As the most influential states of the Caspian region and having long-term experience of regional interstate cooperation, Russia and Iran undoubtedly lay claim to regional leadership. This determines a fairly extensive set of political disagreements that exist between the two countries. Sometimes these disagreements give rise to an active political struggle, which often involves other Caspian states. The economic interests of the Russian Federation and the Islamic Republic of Iran also do not always allow the possibility of coordination on a parity basis. An example here is the long-standing discussion about the status of the Caspian Sea and the division of its oil-bearing shelf, as well as the competition between different routes of export oil pipelines. Attention is drawn to the fact that Russia and Iran, being, based on the realities of the geographical and international political position, regional states-competitors, on the world stage often show themselves as allies, developing coordinated approaches to key international problems. In this situation, the general level of relations between the two states is subject to sharp changes, since interactions include periods of exacerbation of bilateral contradictions and periods of close interaction.

Keywords: *Russian-Iranian relations, strategic cooperation, regional leadership, political dimensions, counterstruggle.*

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Introduction

The history of relations between Russia and Iran spans several centuries, but in the current stage, the development of these relations has acquired strategic significance, having expanded from the bilateral level to the regional and extra-regional levels. Geopolitical peculiarities and the potential for developing economic, political, cultural, and military relations provide fertile ground for Russian-Iranian cooperation in various areas. Russia and Iran are capable of exerting significant influence on developments in the South Caucasus, the Middle East, and the Caspian Sea. Advocating for their interests by both countries is a prerequisite for their significant influence on security in several regions, even altering the balance of power. Since the start of the Special Military Operation in Ukraine in 2022, which escalated into a large-scale war between Russia and Ukraine¹, relations between Iran and Russia have undergone changes, but they can generally still be described as cooperation or, at times, positive competition. The reluctance of Iran and Russia to accept Western, and particularly U.S., dominance in international relations and the desire to build a multipolar world architecture, as well as strengthen other centers of power to counterbalance unilateral hegemony, has become one of the points of contact in the foreign policies of these two countries.

Russia's efforts to resolve the Iranian nuclear issue, its attempts to alleviate international pressure on Iran, and, finally, its role in negotiating the Joint Comprehensive Plan of Action (JCPOA)² have marked a significant step in the history of bilateral relations. Ties between the two countries, influenced by domestic and, more significantly, external factors, have become more dynamic, making their study particularly relevant in light of current international challenges.

The historical basis of Russian-Iranian relations can be described as non-conflict and good-neighborly. It is enough to note that after the Russian-Persian wars of 1804-1813 and 1826-1828, Iran and Russia did not go to war again for the next two hundred years, which in itself characterizes the political culture of their relations (Kia 2023). Even the complications and potential scenarios of conflict that emerged during the two world wars did not lead to military action. And there were exacerbations and crisis situations. In the general history, the two countries have experienced different stages: wars, rapprochement and conflict situations, including the tragic murder of the prominent Russian poet and diplomat Alexander Griboyedov in Tehran. It is worth noting that the Iranian crisis of 1946 and the negative positions of the Shah regime towards the foreign policy initiatives of the USSR during the Cold War were also not favorable in geopolitical terms. However, the three hundred years of common Russian-Iranian political interests around the Caspian Sea predetermined the closeness of Russia and Iran.

¹ UN. 2022. "Russian Federation Announces 'Special Military Operation' in Ukraine as Security Council Meets in Eleventh-Hour Effort to Avoid Full-Scale Conflict." February 23, 2022. Accessed May 31, 2025. <https://press.un.org/en/2022/sc14803.doc.htm>; U.S. Department of War. 2025. Russian War in Ukraine. May 31, 2025. <https://www.war.gov/Spotlights/Support-for-Ukraine/Timeline/>.

² The official website of the Council of the EU and the European Council. Iran's nuclear agreement. Accessed May 31, 2025. <https://www.consilium.europa.eu/en/policies/jcpoa-iran-restrictive-measures/>.

It is concluded that, despite the differences in their political, social and economic systems, there are no contradictions between Iran and Russia³ that would create obstacles to the development of active cooperation in the region. Neither Iran nor Russia is interested in destabilizing the military-political situation in the strategically important regions of the Middle East, the Caucasus, and Central Asia. The interests of both countries are equally opposed to the growing interference of the West, particularly the U.S., in the affairs of states in these regions. NATO expansion poses a direct threat to the national interests and security of both Iran and Russia. Both countries were united in their commitment to maintaining the Caspian Sea as a region of peace, friendship, and mutually beneficial cooperation.

The increased interest in the Caspian Sea is determined by its strategic location between Europe and Asia, its large oil and gas reserves, convenient transportation routes, and valuable sturgeon species. The interests of Russia and Iran in the Caspian region largely coincide. Certainly, some issues remain in Iranian-Russian bilateral relations at the regional level, particularly, as noted above, disagreements over the final determination of the legal status of the Caspian Sea. Initially, Iran aligned itself with Russia in favor of the joint use of the Caspian's water and mineral resources (Kiani 2021). However, other views subsequently prevailed in Iran, and Iran agreed with the Azerbaijani approach aimed at dividing the sea into sectors of equal size. Furthermore, Iran seeks to maximize the geographic advantages of its coastline. Regarding military activity in the Caspian Sea, Iran supports Russia's formulation of establishing an equal balance of arms and a control system for all, as well as the principle of inadmissibility of the presence of third-party forces in the Caspian Sea, including in the airspace over the sea.

Therefore, it is an important and common achievement that relations between the two countries are now not only constructive, but also contribute to the development of much larger projects that shape the image of not only the region, but also the entire world. Of course, the eastern turn of Russian policy should not be perceived as a refusal to engage with its Western neighbors. After all, now Russia is at war, which will primarily determine the future of Europe and the new world order. A global U.S.-Russian agreement is also possible, which could lead to a New Yalta. In any case, Russian-Iranian strategic cooperation is an important component of the new world order, whatever it may be. However, the main task of the Russian political elite in the coming years is to restore Russia to its true historical significance, to make it a pole and a bridge connecting the world, a crossroads where East meets West, and North meets South.

According to Western experts, the current escalation of the confrontation between Iran, the U.S. and Israel is also a factor contributing to the Russian-Iranian rapprochement. The U.S. no longer hides that it is globally preparing to revive the doctrine of maximum pressure on Iran, which could lead to real losses for its economy. If this happens, the chances of starting a huge social instability inside Iran will increase significantly, and integration into Russian-centric structures can neutralize this danger (Tazmini 2021).

³ The MFA of the RF. 2025. the Islamic Republic of Iran. Accessed May 31, 2025. <https://mid.ru/en/maps/ir/>.

On January 17, 2025, Russian President Vladimir Putin and Iranian President Masoud Pezeshkian signed the Treaty on Comprehensive Strategic Partnership between the Russian Federation and the Islamic Republic of Iran⁴, which is a new historical turning point (The MFA of the RF 2025). What opportunities will the new cooperation agreement give to the two countries? This is indeed a very important fundamental document that can condition Russian-Iranian cooperation in the coming years and even decades. We are talking about a new interstate agreement, a comprehensive strategic partnership between the two countries. Is this also about the final formation of a new geopolitical Moscow-Tehran axis, which may have opportunities for expansion?

The challenge of building relationships in a complex geopolitical environment

Iran and Russia face the challenge of building their relations in a fundamentally new and complex geopolitical environment. Valuable experience has been accumulated through joint work in bilateral and multilateral diplomacy and the implementation of economic projects, including on a regional scale. Iran's advantageous geographic location at the intersection of strategically important trade and transport routes allowed it to exploit this factor to extract necessary benefits, primarily in the economic sphere. Capitalizing on its geopolitical advantage, Iran sought to become an active participant in various interstate and interregional associations and to initiate processes occurring in several regions (Aziz 2025). By building its political and diplomatic potential, Iran aimed to enhance its role in the international arena.

The two countries are rivals for spheres of influence in their relations with each other. The competition between Russia, Türkiye and Iran for control over energy export flows is one of the important factors for understanding the nature of international relations in the region. The state of Russian-Iranian relations cannot be viewed outside the context of global international relations and disconnected from the political, economic and military situations in the region (Tyukaeva 2024). Russia is one of the few countries that the Islamic Republic of Iran is actively trying to approach today. However, there are a number of problems that are not always easily resolved. In particular, Moscow can in no way be interested in Tehran gaining access to nuclear weapons. It is obvious that any Iranian government, regardless of its ideological orientation, will not be free from the idea of creating nuclear weapons. It is necessary to take into account the possibility that in the event of Iran acquiring nuclear weapons, its policy may become more radical. In this context, when developing and implementing a policy towards Iran, Russia is forced to take into account the West, especially the U.S. Iran, in turn, claims to have a leading role in the Middle East (Andersen 2023, 81-86).

Despite some contradictions in the positions of the two countries, Iran is of invaluable importance for Russia in the light of modern geopolitical realities. Iran is a large Islamic state with a population of more than 70 million, large reserves of

⁴ Official Website of the President of the Islamic Republic of Iran. 2025. "Full text of Iran-Russia Comprehensive Strategic Partnership Treaty." October 17, 2025. Accessed October 19, 2025. <https://president.ir/en/156874>.

hydrocarbon resources and an independent political player in the international arena. It occupies a strategic position with respect to Afghanistan, Pakistan and the Arab world. In the south, Iran has access to the strategically important Persian and Oman Gulfs, as well as to the world's most important transport arteries, and in the north, Iran controls the southern part of the Caspian Sea (Tyukaeva 2024).

The South Caucasus states bordering Iran, as well as Turkmenistan, are regions of Russia's post-Soviet priority interests. Iran is among the world's top five natural gas and oil reserves, and also has reserves of iron ore, coal, copper, chromium, lead, and other minerals. These make Iran a regional partner and competitor of Russia (Mahmoudian 2023). Before the collapse of the USSR, the Iranian leadership viewed Russia primarily as an ideological adversary and spared no effort to criticize it. The collapse of the USSR and the changes taking place in the world forced the Iranian military-political leadership to reconsider its political vector and view Russia as a strategic ally. Currently, Tehran's policy in Central Asia and the South Caucasus largely corresponds to Russia's national interests. Moreover, Iran is important for Russian interests, as this country is a serious obstacle to NATO's course of creating buffer and sanitary zones in the southern direction. Like Russia, Iran is also a strategic opponent of Euro-Atlantic global expansionism. Tehran is not interested in strengthening the positions of states hostile to it in Central Asia and the South Caucasus. In this context, it can be argued that Iran acts as a strategic ally of Russia in the Caspian-Caucasian geopolitical regions, where fierce geopolitical competition for new transport corridors and trade flows is developing. It can be argued that the Islamic Republic of Iran is a state that is practically able to maintain its self-sufficiency and, under conditions of unprecedented long-term pressure, ensures control over its own natural resources, opposing the U.S. and its allies. Russian-Iranian relations cover the areas of railway, automobile and maritime communications, gas and oil transportation, cooperation in the Caspian Sea, oil production, fishing, military-technical cooperation, the construction of a nuclear power plant in Bushehr, etc.

Current trends in Russian-Iranian rapprochement

After the 1979 Revolution, the Islamic Republic of Iran, due to well-known events and the circumstances of the development of complex, hostile relations with the U.S., became the leading anti-Western country in the South Asian and Middle Eastern regions, for which it has been subject to sanctions for more than forty years.

Russia also appeared on the anti-Western platform when President Putin adopted a policy of tough counteraction to the Collective West's practice of reducing Russia's spheres of influence through color revolutions in the post-Soviet space. The peak of this policy was the current Ukrainian war that began in February 2022 and the application of anti-Russian sanctions on an unprecedented scale. In response to the Western campaign to isolate Moscow, the Russian authorities are seeking to get closer to traditionally anti-Western countries. Due to these realities and dictated by objective reasons, the Russian Federation and the Islamic Republic of Iran have entered into a continuous process of rapprochement and cooperation in interstate relations over the past ten years. The rapprochement of the two countries, caused by anti-Russian and anti-Iranian sanctions, will obviously continue. Some areas, such as military-technical

cooperation, seem promising. Iran can partially help the Russian economy withstand sanctions. Relations between Russia and Iran, which have been developing slowly but surely in recent years, entered a period of rapid development after the outbreak of the Ukrainian war. In response to Western sanctions, Moscow began to look for alternative partners, including those to circumvent trade restrictions, and Iran turned out to be one of the most promising of them (Andersen 2023).

The most sensational was Russia's use of Iranian drones against Ukraine, but the parties' ambitions are not limited to this, new joint projects are emerging in various fields, from gas production to aircraft production. Extensive plans for Russian-Iranian cooperation are worrying the Washington/Brussels tandem. Western think tanks are of the opinion that Iran is unlikely to be able to seriously help the Russian economy bypass sanctions, in addition, they predict domestic political crises that may make it difficult to implement any agreements with the Iranian leadership. However, the reality is that the Islamic Republic of Iran, as one of the key players in the Middle East, has a huge influence on a number of processes taking place in world politics. Developing effective and cheap military technologies and conducting successful research in the field of peaceful atomic energy, Tehran has been following its own path for 45 years, developing strategic partnerships with allies and not allowing its adversaries to dictate their will.

Iran has always been an important player in the South Caucasus, which is why the topic is extremely relevant for Armenian political science, because the development of Russian-Iranian cooperation has a significant impact on South Caucasian political processes. The recent changes in Transcaucasia have allowed Iran to play a more active role in this region. It is necessary to find answers to several important questions. Can Russia lose its positions in this region as a result of Iran's activation and to what extent does Russia participate in the projects developed by Iran in Transcaucasia?

We see that the Iranian side is ready and cooperates with Russia in this region. Moscow and Tehran have similar positions in the sense that all contradictions, all conflicts in this region should be resolved through peaceful political and diplomatic efforts and by the countries of the region themselves, without the intervention of external forces. Both sides are concerned about the attempts of Western countries to take advantage of the changes in Armenia's foreign policy positions. Priority is given to the 3+3 regional-consultative platform⁵ created for the South Caucasus, which includes Azerbaijan, Armenia and Georgia and their three neighbors - Russia, Türkiye and Iran. This concerns, in particular, practical cooperation projects: economy, energy, trade, transport, information and communication technologies, natural resources, humanitarian sphere, education, culture, tourism. Of particular importance in strategic cooperation is the project of the North-South International Transport Corridor. As we know, many Persian Gulf countries are also interested in it, which was highlighted during Putin's visit to Tehran in 2022. And in May 2023, an intergovernmental agreement was signed on the completion of the last missing section of the Rasht-Astara railway. Another project under negotiation is the creation of the Russia-Transcaucasia-

⁵ MFA of the RA. 2024. "Joint Communiqué of the Third Meeting of the "3+3" Regional Cooperation Platform." October 18, 2024. Accessed October 19, 2025. https://www.mfa.am/en/interviews-articles-and-comments/2024/10/18/Armenia_3+3/12901.

Iran energy bridge, which involves the exchange and transportation of electricity between Russia, Armenia, Azerbaijan and Iran during peak load periods.

Negotiations and development of relations from 2022 to 2024

Studying the course of relations between Russia and Iran over the past two years, it can be stated that they have experienced an upswing. Dialogue at the highest level has continued regularly, the exchange of delegations has increased in all areas. As a result, 2022 was an unprecedented year in terms of the number of meetings between high-ranking Russian officials and Iranian counterparts. During the specified period, Deputy Prime Minister Alexander Novak, Foreign Minister Sergey Lavrov, several heads of Russian regions and President Putin himself visited Tehran. A trilateral summit on the Syrian settlement was held in Tehran in the Astana format. In addition, the Russian head of state held separate bilateral meetings with the leaders of Iran and Türkiye, as well as with Iran's Supreme and Spiritual Leader Ayatollah Ali Khamenei. One of the most important events was the visit of the President of the Islamic Republic of Iran Ebrahim Raisi to Moscow on December 7, 2023 and his talks with the President Putin. In this sense, one of the important results of the 2023-2024 high-level intergovernmental negotiations was Iran's accession to integration structures in which Russia plays a key role. In the summer of 2023, Iran became a full member of the Shanghai Cooperation Organization (SCO), and on January 1, 2024, it joined BRICS. Subsequently, a free trade agreement was signed between Iran and the Eurasian Economic Union, and Iran received observer status in the EAEU. Russia's official position is that Iran's accession strengthens the strategic partnership and international standing of these international structures, which, in principle, will lead to a profound transformation of international relations, reflecting the emergence of a more equitable world order. Iran, on the other hand, recognizes the need to reduce Western influence in global affairs.

Intensive Russian-Iranian economic cooperation on international platforms has created an opportunity to include other countries: Afghanistan, Transcaucasia, the Middle East. All this is happening actively, regularly, and, I think, is also beneficial for Armenia-Iran bilateral relations.

The West is responding to the rapid Russian-Iranian rapprochement of the last two years by tightening sanctions, the justification for which is the support provided to Russia on the Ukrainian front. Iran's economy is also suffering after the U.S. withdrawal from the nuclear deal in 2018 and the so-called 'maximum pressure policy' implemented on Iran by the first Trump administration, affecting the oil, banking, and transport sectors. According to a number of Russian experts, the current sanctions imposed by Western countries due to Iran's alleged support for Russia in Ukraine are fundamentally untrue, have a primarily political effect, and have little impact on Iran's economic performance (World Bank 2025; International Bank for Reconstruction and Development/The World Bank 2024). There are areas where Russia and Iran can compete on the global stage, but we don't see this as anything that could negatively impact our relations. Both countries possess large oil and gas reserves, but this doesn't hinder, but rather facilitates, close cooperation within OPEC and the Gas Exporting

Countries Forum. Russian energy companies are successfully operating in the Iranian market, and last year Russia ranked first in foreign investment in Iran.

The Russian government's activity in Iran has also affected private businesses. In recent months, hundreds of Russian entrepreneurs, who had previously never considered cooperating with Iran, have visited Tehran. As a result, total trade between the two countries, while reaching \$4 billion in 2021, reached \$4.7 billion in 2023, and approximately \$4.8 billion in 2024 (Kozhanov 2023; TASS 2025a). It should also be noted that Western expert centers believe that Iran cannot yet claim the role of savior of the Russian economy from sanctions, and the Iranian direction is unable to compensate for the loss of income due to Western sanctions (Kiani 2021). In their opinion, trade turnover is less than 1% of the total volume of Russian foreign trade, and Iran still has a long way to go to match the level of countries like Türkiye, with which trade amounts to about \$30 billion annually. Researchers in this direction also believe that the implementation of large Russian state projects in Iran will also not be easy. The issue of return on investments is emphasized. Tehran is short of foreign currency and struggles with a budget deficit every year. This has created problems for Moscow in the past. For example, the issue of Iran's debt to Russia for the construction of the Bushehr nuclear power plant, which in 2021 amounted to at least \$500 million, has not yet been resolved. The development of Russian-Iranian relations is also questioned by those who note the possible deepening of the internal political instability of the two countries, noting the theocracy in Iran and the authoritarian/arbitrary system of government in Russia, which can collapse at any time.

The gas factor in Russian-Iranian interstate relations

The West's policy of pushing Russia out of the global gas market and isolating it, which was implemented by blowing up the gas pipelines passing through the Baltic Sea and stopping gas supplies to Europe via Ukraine from the beginning of 2025, is a potentially good opportunity for gas-exporting countries to fill the vacant spot in the energy market. However, Iran did not have such an opportunity, as in late 2022, Russia and Iran found themselves in a bitter standoff with the West, which was imposing ever-increasing sanctions against them. As a result, the gas factor became a factor of cooperation and rapprochement, rather than competition. Unsurprisingly, Moscow and Tehran shifted sharply toward rapprochement not only in the military sphere but also in the energy sector. The parties signed a memorandum providing for massive Russian investment in Iranian gas projects and have already begun implementing it. Given that Russia and Iran hold the world's first and second-largest gas reserves, many saw this cooperation as a danger of the emergence of a 'global gas cartel'. Of course, sanctions will reduce the profitability of many planned gas projects, and their implementation will face difficulties due to the restrictions imposed on both countries. Future events will reveal the extent to which the gas factor will strengthen the alliance, or whether it will prove situational until relations between Iran and the West change (Keynoush 2022).

Shortly after Russian gas exports to Europe were disrupted by the invasion of Ukraine, Iranian officials admitted that they were considering supplying their gas to the empty European market. In theory, such an initiative seems logical, but in reality,

Tehran's gas competition is unrealistic, because in the short term, gas supplies from Iran to the EU are excluded. The reason is the consistent policy of Western countries. For three decades, Europe and the U.S. have systematically isolated Tehran from participating in major international energy trade and transit projects. Iran's rivals, such as Russia and Qatar, have been much more reliable and promising partners than the anti-Western Islamic Republic. The final stop to the Iranian path was put by U.S. sanctions. They prevented the introduction of liquefied natural gas technologies in Iran and the construction of gas pipelines to Europe. As a result, Tehran has focused on meeting domestic gas needs and small regional exports, mainly to Türkiye and Iraq. There is little chance of lifting sanctions in the foreseeable future, which are tied to the nuclear deal, negotiations on its extension have reached a deadlock (Keynoush 2022, 91-96). In this situation, Russia is a promising partner for the Iranian gas industry, which is why the National Iranian Oil Company (NIOC) and Gazprom signed a memorandum of understanding on investments in 2022. Difficulties arise from the sharp decline in exports to Europe, which is reducing the Russian gas giant's revenue, while large-scale investments in Iranian projects threaten to place an additional burden on Gazprom's budget. Practical steps have been developed for exporting Russian gas to Iran, provided that Iranian gas continues to be supplied to third countries in the same volumes in the future. Ultimately, gas pipelines from Russia, Azerbaijan, and Turkmenistan may be connected in Iran, where, in light of these circumstances, provisions on gas cooperation were also included in the latest agreement.

New Treaty in the Iranian-Russian bilateral and multilateral dimensions

Before the signing of the agreement, relations between Russia and Iran were based on the Treaty on the Fundamentals of Relations and Principles of Cooperation. It was signed back in 2001 and was automatically updated every five years. In recent years, Moscow and Tehran have come to the conclusion that the document does not correspond to new geopolitical realities and a higher level of cooperation. Active work on a new agreement began in January 2022, following a visit to Moscow by former President Ebrahim Raisi, who died on May 19, 2024, in a helicopter crash while returning from negotiations in Azerbaijan. According to Iranian Ambassador to Russia Kazem Jalali, the work on the text took about two and a half to three years, and as a result of meetings and discussions, after numerous amendments, an agreement was finally reached.

On January 17, 2025, after negotiations in Moscow, Russian and Iranian Presidents Vladimir Putin and Masoud Pezeshkian signed the Bilateral Treaty on Comprehensive Strategic Partnership (MFA of the RF 2025). It consists of a preamble and 47 articles⁶. One third of the document is devoted to issues of bilateral military-technical cooperation (exchange of military delegations, reception of warships in each other's ports, training of military personnel, holding joint exercises, and cooperation in

⁶ Official publication of legal acts. 2025. "Treaty on the Comprehensive Strategic Partnership between the Russian Federation and the Islamic Republic of Iran dated January 17, 2025 (ratified by Federal Law No. 73-FZ dated April 21, 2025, entered into force on October 2, 2025)." Accessed November 30, 2025. <http://publication.pravo.gov.ru/document/0001202510020001> (In Russian).

combating common threats). In the area of international security, cooperation in the field of arms control and non-proliferation and cooperation in the field of international information security are envisaged. In a separate provision (Article 12), Moscow and Tehran stipulate that they will contribute to strengthening peace and security in the Caspian Sea region, Central Asia, Transcaucasia and the Middle East and will cooperate to prevent the destabilizing presence and intervention of third states in the said regions.

Unlike the Comprehensive Strategic Partnership Treaty signed between Russia and the Democratic People's Republic of Korea (DPRK) in 2024, the agreement with Iran does not contain a clause stipulating that if one party is subjected to an armed attack by any state or states and subsequently finds itself in a state of war, the other party must immediately withdraw. Meanwhile, in Article 3 of the Treaty on the Comprehensive Strategic Partnership between the Russia and Iran, Russia and Iran established a different mechanism: if one party is subjected to aggression, the other party must not provide the aggressor with any military or other assistance that would facilitate the continuation of the aggression⁷. Iranian officials have emphasized that the document does not envisage the creation of a defense alliance. According to Iranian Foreign Minister Abbas Araghchi, the treaty includes cooperation in security and defense, but does not aim to create a military alliance (TASS 2025b). Russia and Iran have agreed to cooperate between their intelligence services to strengthen national security and counter common threats, in line with the strategic partnership between the two countries. The document also contains articles on cooperation in such areas as trade and economy, transport, peaceful use of nuclear energy, healthcare, education, space exploration, cultural exchanges, etc.

In their comments, the presidents of both countries emphasized that the interests of both countries will pave the way for further cooperation. In this way, the countries demonstrate that Iran's political leadership and Russia are determined to eliminate minor, insignificant obstacles to trade and economic relations, as Iran's observer status in the Eurasian Economic Union is also of great importance (Aziz 2025; Smagin 2025). After all, even before the signing of the agreement, Russia defended Iran's interests in international organizations, including the UN Security Council. Now such cooperation will also be provided for in an official document on comprehensive cooperation.

The agreement between Russia and Iran, which is in confrontation with the collective West, is characterized by negative aspects in Western centers. They call the new partnership a union of those who do not trust each other, a union of mistrust, considering it a bad sign before Trump's inauguration. According to The Times⁸, before Pezeshkian's upcoming visit to Moscow, Ali Larijani, an adviser to the Supreme Leader of Iran, arrived in Russia for secret meetings, who could discuss Russian assistance in developing Iran's nuclear program and strengthening air defense systems. The publication's intelligence sources suggest that Russia, depending on Iranian missiles and drones, may move forward in supporting Tehran's nuclear ambitions. One

⁷ Ibid.

⁸ The Times. 2025. "Iran in secret talks with Russia to bolster nuclear ambition." January 12, 2025. Accessed November 30, 2025. <https://www.thetimes.com/world/middle-east/article/iran-russia-nuclear-talks-deal-lfzbdh7z7>.

of the main aspects of Russian-Iranian cooperation is the mutual supply of weapons, which is of most concern to the West. The text of the agreement itself does not provide any specifics on this issue, but a comprehensive agreement would undoubtedly contribute to this.

Russia and Iran are deepening their cooperation in developing drones and missiles, which Russian forces are using in the war against Ukraine. Western countries have officially accused Iran of supplying drones and ballistic missiles to Russia, but Iran denies these supplies. Iran has, however, expressed interest in Russian Su-35 fighter jets and S-400 air defense missile systems. Russia has already supplied Iran with combat trainer aircraft, which are necessary for training pilots to fly modern Russian fighter jets.

Two decades ago, when the conflict between Russia and the West deepened, the thesis of the possibility of the formation of a new Moscow-Tehran geopolitical axis began to circulate. Now the new agreement between Russia and Iran pursues ambitious goals, it is a breakthrough document and will significantly affect global and regional processes. On most foreign policy issues, the positions of Russia and Iran coincide. Russia and Iran will jointly neutralize the interventions of extra-regional forces in the Caspian Sea region, Central Asia, Transcaucasia and the Middle East, which they consider destabilizing.

The launch of the Russian-Iranian gas pipeline project has been announced, potentially transforming the energy markets of neighboring countries. Russia and Iran have agreed on a route for the pipeline through Azerbaijan. Clearly, the Russian-Iranian gas pipeline is of geopolitical rather than economic significance, as it represents a key step in the formation of a multipolar global energy order. The Russian-Iranian gas pipeline is particularly significant in light of ongoing negotiations to build a gas pipeline involving Russia, Iran, Qatar, and Turkmenistan. Amid the implementation of such megaprojects, Armenia is once again finding itself on the sidelines. A potentially advantageous geographic location remains unrealized due to the lack of a clear foreign policy strategy, particularly with regard to the North-South energy transport route, which, as we see, is gradually shifting to Azerbaijan.

The articles of the military-political sphere deserve attention, although a military alliance is not being created, the agreement contains an article on strengthening cooperation in the security and defense sector, according to which if one of the parties is subjected to aggression, the other should not provide any assistance to the aggressor. In this area, Russia and Iran have agreed to cooperate between their intelligence services within the framework of a comprehensive strategic partnership to strengthen national security and counter common threats. Russia and Iran do not allow their territories to be used to support separatist movements that threaten their territorial integrity. It is clear to the West that Iranian-Russian relations, if they develop positively, have and can have stabilizing potential. Conversely, stagnation in bilateral relations, especially their deterioration, could significantly reduce the ability of both Iran and Russia to influence developments in a strategically important region (Kozhanov 2023, 80-85). We believe that the future quality and level of development of bilateral Iranian-Russian relations will directly depend on global international factors, as well as the evolution of political systems and key foreign policy priorities in

both countries. Russia, by defending its own interests, objectively contributes to upholding Iran's vital national interests in foreign policy, economics, and defense. It is also clear that during the period under review, both Iran and Russia sought to pursue transparent, multi-vector foreign policies, both regionally and globally. All these processes confirm the conclusion that Iranian-Russian relations in the 21st century are not superficial or opportunistic, as some experts claim, but rather strategic, as they represent the fundamental interests of both countries. Overall, we can conclude that the development of the entire spectrum of Iranian-Russian interstate relations during the period under review has been on an upward trajectory. Several key factors contributed to this process: the evolution of domestic political systems in both countries, on the one hand, and the rapidly changing international situation with its nearly overlapping threats to the national security of Iran and Russia, on the other.

When improving Iranian-Russian cooperation, it is necessary to consider mutual interests in maintaining stability and non-proliferation in the region, as well as expanding and diversifying economic ties. The development of cooperation between Iran and Russia should not be hindered by the existence of divergent, but not contradictory, interests.

Considering a number of significant factors, such as Iran's involvement in various international processes, the active and high-quality Iranian diplomacy, its advantageous geopolitical position, as well as its colossal natural resources and the most powerful army in the region, it must be recognized that Iran's role in international and interregional relations will remain equally important and significant in the near future. Therefore, it seems necessary and quite logical to build partnerships and strategic relations between Russia and Iran within the framework of mutually beneficial bilateral cooperation, in the context of Russian-Muslim dialogue and the goal of stabilizing the situation in the South Caucasus and Central Asia, and upholding Russia's interests in this region. Clearly, Iranian-Russian relations, if they develop positively, have and can have stabilizing potential. Conversely, stagnation in bilateral relations, especially their deterioration, could significantly reduce the ability of both Iran and Russia to influence developments in a strategically important region. We believe that the future quality and level of development of Iranian-Russian bilateral relations will directly depend on global international factors, as well as the evolution of political systems and key foreign policy priorities in both countries. Russia, by defending its own interests, objectively contributes to upholding Iran's vital national interests in foreign policy, economics, and defense. It is also clear that both Iran and Russia have strived to pursue transparent, multi-vector foreign policies, both regionally and globally. In this sense, we can conclude that the development of the entire range of Iranian-Russian interstate relations has been on an upward trajectory. This process was facilitated by several key factors: the evolution of domestic political systems in both countries, on the one hand, and the rapidly changing international situation with its almost identical threats to the national security of Iran and Russia.

The Impact of U.S. Policy on Russian-Iranian Relations

The U.S. is attempting to block Russian-Iranian ties in two areas. The first is primarily military and energy cooperation, including nuclear cooperation. The second is Russian-

Iranian regional and international cooperation in the Caspian region, Central Asia, the Caucasus, and the Middle East. During the presidency of Boris Yeltsin, Moscow's emphasis on relations with Washington in the first years after the collapse of the USSR prompted the Russian leadership to limit arms sales to Iran. The aforementioned Gore-Chernomyrdin Agreement became the legal basis for coordinating Moscow and Washington's foreign policies. According to it, Russia pledged not to enter into new arms deals with Iran and to complete all existing agreements by 1999.

Russia concluded the Gore-Chernomyrdin Agreement in an effort to improve relations with the United States. It should be noted that the U.S. failed to fulfill its obligations to Russia, which led to significant losses, and the suspension of military supplies to Iran had an extremely negative impact on relations between Russia and Iran.

Iran's nuclear program provided another pretext for U.S. interference in Russian-Iranian relations. The first signs of this appeared in the late 1990s. In April 1998, the Russian Ministry of Atomic Energy announced that Russia was prepared to provide Iran with an experimental reactor. Washington was concerned that this equipment could be used to enrich uranium to the level needed for nuclear weapons. Russia therefore agreed to delay the delivery of the reactor, which also provoked a negative reaction from Tehran.

In the late 1990s, Iran's missile program became another contentious issue. Following the successful test of the Shahab-3 missile in July 1998 and the subsequent publication of a Central Intelligence Agency (CIA) Report⁹ on Russian support for the missile's production, as well as Russian cooperation with Iran in the Iranian nuclear program, the U.S. government imposed sanctions on several Russian institutions and organizations in January 1999. At the direction of former President Boris Yeltsin, an Iranian proposal for a uranium mining project in Iran was rejected because, under U.S. pressure, Russia refused to sell enrichment technology and dual-use equipment to Iran. This caused serious damage to Russia, and several Russian organizations were also placed under U.S. sanctions. Iran, in turn, also found itself in a difficult situation due to disruptions in its missile and nuclear programs.

Russian-Iranian relations were formed in the context of a fully-fledged Russian-Ukrainian war. Russia is thus attempting to advance its national interests against the US, EU, and NATO, thereby attempting to shape its global leadership strategy (Mahmoudian 2023). Clearly, this circumstance also influences Russian-Iranian relations.

The New World Order doctrine marked the introduction of a new phenomenon into the international political system: U.S. intervention in resolving and resolving global and regional problems and conflicts. In this sense, an emphasis on collective security is also a fundamental tenet of U.S. doctrine.

The essence of this phenomenon lies in the distribution of international responsibility for collective security, which is merely a pretext for ensuring not only the U.S.'s own security but also that of all NATO member states. Interestingly, the

⁹ CIA. 1998. "Unclassified Report to Congress on the Acquisition of Technology Relating to Weapons of Mass Destruction and Advanced Conventional Munitions, 1 January Through 30 June 1998." Accessed November 30, 2025. https://www.cia.gov/readingroom/docs/DOC_0000839061.pdf.

involvement of other elements of the international system in resolving global security issues is aimed at reducing Washington's costs and the number of responsibilities imposed on them. Those states interested in feeling secure, and ultimately defending their own security, are willing to cooperate with the U.S. and do not threaten American interests. The situation is exacerbated when UN Security Council members violate UN rules.

Thus, Moscow's emphasis on relations with Washington during Boris Yeltsin's presidency, along with America's foreign policy doctrine during the same period, weakened Russian-Iranian relations.

The rise of Vladimir Putin to the Russian leadership in late 1999 marked the beginning of Russia's implementation of a pragmatic approach in its foreign policy and the pursuit of an independent political line based on Russian national interests. This change in Russian foreign policy course somewhat eased U.S. pressure on Russian-Iranian relations. Under these new circumstances, Washington's efforts, compared to the situation in the 1990s, proved insufficient to seriously damage cooperation between the two countries.

In November 2000, Russia terminated the Chernomyrdin-Gore Agreement¹⁰, and Putin's decision led to the imposition of anti-Russian sanctions by the U.S., banning the purchase of Russian rockets for launching satellites into orbit, curtailing investment, and complicating Russia's foreign debt repayment terms. Despite continued pressure, in July 2002, Russia announced that it would not only complete construction of the Bushehr Nuclear Power Plant but also intend to build additional nuclear power plants in Iran¹¹. The Russian leadership's position was that even if Iran did not sign the Additional Protocol, Russia would continue to supply fuel to the Bushehr Nuclear Power Plant. Russian-Iranian cooperation during this period reached its zenith in 2007 with the signing of an agreement for Russia to supply Iran with the S-300 air defense system, one of the most advanced missile defense systems.

In the U.S., a somewhat different situation emerged after the Republicans came to power under George W. Bush in 2000. U.S. foreign policy underwent significant changes, and the turning point in this process was the terrorist attacks on New York and Washington on September 11, 2001. The policy of nuclear deterrence gave way to a policy of preventive war, and U.S. behavior immediately became characterized by aggressiveness and disregard for international law. George W. Bush relied on the country's military might. Striving for absolute security, the American government focused all its efforts on developing military resources.

The main tenets of the new U.S. foreign policy program became preemptive attack, unilateralism, the spread of democracy, and the war on terrorism. All of this together triggered the tragic events in the Middle East. The U.S. attack on Iraq was not

¹⁰ Office of the Vice President. 1993. Statement by Vice President Al Gore. September 1, 1993. Accessed November 30, 2025. <https://clintonwhitehouse6.archives.gov/1993/09/1993-09-01-gore-statement-russia.html>.

¹¹ World Nuclear Association. 2025. Nuclear Power in Iran. December 4, 2025. Accessed December 5, 2025. <https://world-nuclear.org/information-library/country-profiles/countries-g-n/iran>; IAEA. 2025. Iran, Islamic Republic of. Accessed December 5, 2025. <https://pris.iaea.org/PRIS/CountryStatistics/CountryDetails.aspx?current=IR>.

sanctioned by the UN Security Council and did not receive support from leading European countries, including Russia and France. However, America had its own goals, which it persistently pursued. In January 2002, President Bush coined the term ‘axis of evil’, referring to three countries—North Korea, Iraq, and Iran—and accused them of supporting international terrorism and seeking to proliferation of nuclear weapons. From that moment on, terrorism and weapons of mass destruction became the most important threats to U.S. national security.

Thus, Russia’s pursuit of an independent policy toward Iran during this period could have significantly reduced U.S. influence on Russian-Iranian relations, given the American leadership’s declaration of Iran as part of the ‘axis of evil’ and its desire to isolate the Iranian state internationally.

Dmitry Medvedev’s presidency from 2008 to 2012 marked a reset of sorts, a new stage in Russian-American relations. This undoubtedly had a strong impact on Russian-Iranian relations during the Barack Obama administration. Notably, President Medvedev placed a strong emphasis on the West in his policies. A negative consequence of the rapprochement between Russia and the U.S. was the deterioration of Russian-Iranian relations, directly reflected in Russia’s refusal to supply Iran with the S-300 air defense system and Russia’s agreement to impose strict sanctions against Iran. At the same time, after 2006, due to Western pressure on Iran over its nuclear program, no country was prepared for the consequences of cooperation with Iran. Thus, even the limited cooperation that continued between Russia and Iran during this period may testify to the depth of friendly relations between the two countries.

B. Obama’s foreign policy retains many of the key principles established by his predecessors, including the presence of American troops in Afghanistan and the practice of U.S. intervention in the internal affairs of other states.

Terrorism, nuclear weapons, and global crises continued to constitute the primary threats to the U.S., according to the 2010 National Security Strategy¹². However, the focus was now shifted from the fight against terrorism to cooperation and the development of military potential. The strategy of preventive war was replaced by a strategy of competition and cooperation, including cooperation with Russia. As for national security, so important to the American leadership, a very inventive step was taken in this area. Nuclear terrorism has been publicly declared by the U.S. to be a threat to interconnected security, implying that all actions to prevent terrorists from gaining access to nuclear weapons are justified and humane.

Thus, U.S. policy has had a destructive impact on Russian-Iranian relations. During Dmitry Medvedev’s presidency, the level of cooperation between Iran and Russia in the nuclear and military spheres has declined significantly.

Vladimir Putin’s subsequent presidency, from 2012 to the present, has been marked by growing tensions in relations between Russia and the West, following events in Ukraine and the West’s imposition of political and economic sanctions against Russia in 2014. During this time, the threat of terrorism in the Middle East, particularly in Syria, has intensified. These circumstances have created favorable conditions for intensifying cooperation between Russia and Iran. It is also important that newly

¹² The White House. 2010. National Security Strategy, May 2010. Accessed November 30, 2025. https://obamawhitehouse.archives.gov/sites/default/files/rss_viewer/national_security_strategy.pdf.

elected Iranian President Hassan Rouhani, a moderate politician, initiated a foreign policy course aimed at reducing tensions in Tehran's relations with world powers, primarily regarding the Iranian nuclear program. For Russia, this reduced the risk of cooperation with Iran, which, recognizing its shared objectives with Russia in the Middle East, particularly in resolving the Syrian crisis, sought to take advantage of the cooling in relations between Russia and the U.S. growing idea among Iranian politicians is that success in countering U.S. regional partners—Türkiye, Saudi Arabia, and Qatar—in Syria can only be achieved through an alliance with Russia. In this context, we believe that former Iranian President Hassan Rouhani's pro-Western approach to Iranian foreign policy and the need to improve Iran's relations with the West as one of the priorities are a worrying signal for Russia, calling on it to pay more attention to its relations with Iran.

The 2014 U.S. Defense Posture Review, which remains relevant today, calls for an expanded U.S. military presence in Asia and the Middle East. Iran's regional politics and asymmetric power are declared the primary threat, and appropriate mechanisms will be developed by 2020 to counter them. This again implies a strategy of U.S. intervention in the internal affairs of other states, albeit through slightly different means. The new National Security Strategy of February 6, 2015, once again develops the idea of America achieving leadership on a wide range of issues, with the subordination of other countries to the U.S. consistently remaining a key message. Iran's regional activity is a pressing concern in this context, leading to repeated references to the availability of all options for countering Iranian expansion. As for other states, including European ones, the clear goal is evident: to sow discord in relations between global players in order to influence their power, undermine it, and persuade them to ally with the U.S. For example, the section 'Strengthening Our Enduring Alliance with Europe' is devoted to the Ukrainian issue. American leadership has attempted to portray Russia's approach to the political crisis in Ukraine as a serious threat to the entire European continent. The 2015 U.S. National Security Strategy¹³ explicitly states that the processes currently unfolding in Ukraine and the actions of pro-Western forces in Kyiv are coordinated by the United States.

Russia's independent policy and the agreement reached on Iran's nuclear program have led to the U.S. ceasing to exert a decisive influence on Russian-Iranian relations. Russia and Iran are developing and supporting a policy of resisting the increased control and influence of the U.S. and NATO, which claim to establish the ultimate authority, negate the role of the UN, and reduce the regulation of global processes and the fate of states to the will of new world leaders. Nevertheless, an analysis of the state of Russia-Iran relations without considering the nature of U.S. policy and the extent of its influence is nearly impossible. Throughout the recent history of Russian-Iranian relations, increasing U.S. influence has led to a weakening of Russian-Iranian cooperation, and conversely, a decrease in such influence has contributed to an improvement in relations between the two countries. It is also important to consider that Russia, compared to Iran, plays a more important role in containing U.S. pressure. Russia and Iran occupy different positions on the international stage and possess

¹³ The White House. 2015. National Security Strategy, February 2015. Accessed November 30, 2025. https://obamawhitehouse.archives.gov/sites/default/files/docs/2015_national_security_strategy_2.pdf.

different potential in world affairs. In a multipolar world, different countries have different potential, as all states can be classified according to their potential into five groups: superpowers, great powers, middle powers, small (insignificant) powers, and micropowers. According to this classification, Russian-American relations are the relations between two superpowers, which operate at the global level and significantly influence Russian-Iranian relations. The latter are considered to be relations between a superpower and a middle power. Based on this, it can be argued that Russian-Iranian relations are significantly influenced by Russian foreign policy and the nature of Russia's relations with the United States.

It is clear that Russia and Iran seek to limit U.S. influence in their relations with each other. Common interests and threats, as well as Russia and Iran's geographic proximity, mean that the two countries share common interests in many areas (Smagin 2025). Expanded Russian-Iranian cooperation is currently developing in the economic, military-technical, nuclear energy, and security spheres. The scope of regional cooperation between Russia and Iran has now expanded beyond Central Asia, the Caspian region, and the South Caucasus to Syria. Russia and Iran's proximity to each other underscores the existence of common security threats that cannot be addressed without joint cooperation. These threats include the spread of terrorism, the drug threat, and the infiltration of NATO and the U.S. into the region.

The long history of Russian-Iranian relations, which have experienced repeated ups and downs, has resulted in a wealth of experience in cooperation, mutual understanding, and mutual respect between Russia and Iran. Iran recognizes Russia's status as a global power with which it can reach an understanding on bilateral and regional issues and is making efforts to establish close relations with Russia. Russia, in turn, recognizing Iran's weight in the region and the extent of its influence on developments in the Middle East, is seeking to capitalize on Iran's potential (Tazmini 2021). The two countries have managed to reach mutual understanding on a number of issues on which they previously had disagreements, such as the supply of S-300 missile systems. Iran recognizes Russia's superiority in Central Asia and the Caucasus and tries to avoid the emergence of significant contradictions with Russia in pursuing its policies.

Conclusion and discussion

Since 2022, both countries have noticeably converged in their foreign policy positions, given that Russia, seeking to strengthen its status as a regional power, is seeking to distance itself from Western centers of power by embracing a multipolar world model. Iran is also seeking to present itself as a regional power within the existing international system. In our opinion, these changes have contributed to the emergence of common ground in areas such as a commitment to the principle of multipolarity, joint efforts to limit U.S. influence in the Middle East, the South Caucasus, and Central Asia, the fight against EU and NATO expansion, the search for an optimal solution to counter terrorism, particularly in Syria and Afghanistan, and the expansion of economic cooperation, including in nuclear energy and arms.

Military cooperation is a key area of Russian-Iranian intergovernmental relations. Despite the influence of foreign policy factors and the intervention of Western

countries, particularly the U.S., to restrict arms supplies to Iran and Russia, this area can be considered one of the most stable aspects of Russian-Iranian cooperation. This can be explained as follows: firstly, a significant portion of the military sphere, which includes arms sales and purchases, is economic in nature, influenced by global arms market rules, and dependent on supply and demand systems. Secondly, common security threats to Russia and Iran, including the expanding influence of the U.S., the EU, and NATO in the Middle East, South Caucasus, and Central Asia, as well as the spread of terrorism, have had a positive impact on this area and led to the expansion of military cooperation.

Russia and Iran interact within the framework of the International Atomic Energy Agency (IAEA), which has been controversial due to the change in the status of Iran's nuclear program and its referral to the UN Security Council by the IAEA. This change in status led to a series of sanctions that have seriously impacted Russian-Iranian relations, particularly in the nuclear field. Secondly, Western countries and the U.S. pressured Russia, limiting its nuclear relations with Iran at a time when Russia was attempting to improve relations with the U.S. In negotiations to resolve the Iranian nuclear issue, Russia's primary role was to resolve the crisis, which had global dimensions. At the same time, it is believed that a global decline in energy prices, caused by Iran's return to the energy market, is not in Russia's interests. However, Russia's willingness to play a constructive role in resolving this issue has strengthened trust and expanded the space for cooperation between the political elites of Russia and Iran.

The newly independent post-Soviet states that emerged after the collapse of the USSR began to influence various aspects of Russian-Iranian relations, as both countries sought to balance bilateral relations in the South Caucasus, the Caspian region, and Central Asia with the interests of new political actors. These countries' cooperation with the U.S., EU, and NATO is leading to the spread of Western influence in these regions, which has become and continues to be a challenge to the interests of Russia and Iran. One of the key areas of cooperation between Russia and Iran has become the development of the transportation network, and the International North-South Transport Corridor (INSTC) project¹⁴ could become a means of eliminating Western influence in the post-Soviet space, alongside comprehensive cooperation between Russia and Iran in other areas. The post-Soviet space faces serious problems that require the participation of all countries in the region.

Under the current circumstances, energy serves as an integrating factor, facilitating cooperation between various countries and regions. On the other hand, the energy sector has significant conflict potential. Energy is used as a geopolitical tool, and political interests are increasingly influencing energy development. All countries place great emphasis on access to and control over energy resources, and they employ all available means, including diplomacy, to ensure energy security. In this regard, the first chapter of this dissertation separately examines the energy strategies of Russia and Iran.

¹⁴ Eurasian Development Bank. 2022. "International North-South Transport Corridor: Investments and Soft Infrastructure." Reports and Working Papers 22 (2). Accessed November 30, 2025. https://eabr.org/upload/iblock/687/EDB_2022_Report-2_INSTC_eng.pdf.

Russia and Iran are among the largest energy producers and exporters, playing a significant and influential role in the global energy market. They are inevitably involved, and will become increasingly involved, in the process of globalization. Oil and gas resources are important factors influencing the national security of Iran and Russia. This study concluded that energy security is directly linked to the geopolitical position of countries and their neighbors. From a geopolitical perspective, Iran and Russia occupy a unique position on the global geopolitical map. Amid its confrontation with the U.S., Iran has begun to closely cooperate with Russia, ceding certain market positions to it in order to join its confrontation with the West.

In the face of globalization challenges, growing international exchange and interdependence, and the emergence of new energy security challenges, cooperation between Russia and Iran must be long-term, effective, and truly mutually beneficial, taking into account common interests and threats. Expanding the capabilities of the North-South Transport Corridor and Iran's participation in the SCO will create additional opportunities for fostering mutual understanding between Russia and Iran and expanding their energy cooperation. Overall, it can be argued that developing energy cooperation between Russia and Iran will contribute to the deepening of their strategic partnership in the long term.

Iran and Russia are committed to addressing the complex issues surrounding Caspian hydrocarbons, including the legal status of the sea-lake, exploration and development of fields, and the selection of routes for transporting hydrocarbons to global markets.

The two countries' geographic location makes them *de facto* monopolists in the creation of a unique transport corridor connecting Europe with the Asia-Pacific region. Russia has also always been well aware that without Iran, many of the Caucasus's problems, from economic to security, cannot be resolved. By establishing good relations with Iran, Russia is strengthening its own security and that of the Caucasus. A key role in realizing Iran's aspirations was given to transforming the country into a major global transit hub with transport corridors passing through its territory. By developing trade and economic relations with Russia, Iran was also attempting to address one of the key objectives of its export policy: increasing non-oil exports and reducing its economy's dependence on oil exports.

In the modern world, the issues and principles of building an allied relationship between Russia and Iran are becoming increasingly important. An integral part of these relations is the military-political dimension, bilateral strategic alliances, and integration associations, which, in turn, are not static and are subject to various centrifugal processes that could lead to their disintegration.

From the perspective of the Middle East, Central Asia, and South Caucasus, these issues are of particular interest in the context of Russian-Iranian relations. Due to the historical, cultural, and socioeconomic development of this structurally heterogeneous and conflict-prone region, there is no clear leader; a number of players invariably claim this role. The political situation in the Middle East, Central Asia, and South Caucasus states is characterized by significant fluidity, a multi-layered nature, and a low degree of predictability in future developments. The knot of unresolved long-standing conflicts is increasingly tightening. Even in those countries where the domestic

political situation seemed relatively stable, deep socio-economic and ethno-confessional contradictions have emerged, which have already led to the emergence of new points of armed confrontation and to the imbalance of the established regional structure.

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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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U.S.-IRAN HOSTILITY AND THE PURSUIT OF NUCLEAR TECHNOLOGY DEVELOPMENT IN THE CONTEXT OF THE GLOBAL ENERGY TRANSITION: AN INTEGRATIVE ANALYSIS

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Abstract

This article analyzes the Iranian nuclear program, which oscillates between friendship and hostility between the United States and Iran, threatening sustainable global peacebuilding and energy transition goals. Although research has been conducted on the relationship between the two countries, the results of existing studies have not been integrated to answer questions about the implications of the issues surrounding the Iranian nuclear program for energy transition aspirations. This study analyzes the consequences of hostility between the two countries due to the Iranian political elite's pursuit of nuclear technology, thereby attempting to implement national steps toward a global energy transition. The study hypothesizes that the previously existing hostile relationship between the two countries will influence their preference for nuclear technology as a measure of energy transition. This study uses an integrative analytical approach as its data collection method. The theoretical basis of the analysis is offensive realism, which is applied from the perspective that the desire to maximize power, egoism, and fear of other states are the conditions responsible for the conflict and competition observed in the international system. The survival of the modern Iranian state in the global system underscores the reason for this behavior of political leadership in its relations with other states. In this regard, the study notes that Iran's nuclear issues do not affect the country's desire to use nuclear technology. To acquire nuclear technology, the country must meet certain criteria, including technical, social, and political ones. However, the primary emphasis is on the social and political criteria, including an effective government and a politically stable economy. The study recommends that Iran's political leadership take real and proactive steps to adopt and implement consolidating democratic principles to ensure success in achieving its goal of establishing a civilian nuclear program.

Keywords: *clean energy, global energy transition, global peace, Iran, USA, hostile relations, nuclear technology.*

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Introduction

Iran's nuclear program, begun in the 1950s during the reign of Mohammad Reza Shah with the support of the United States through the 'Atoms for Peace' program, was part of the Iranian administration's plan to reduce dependence on oil by the year 2000 (Hussain 2015; Bazoobandi 2019; Gaietta 2015; Rezaei 2017; Eslami 2024). The 'Atom for Peace' programme in the United Nations' Nuclear Non-proliferation Treaty, NPT, of 1968 was designed as an approach to facilitate the sharing of nuclear technology with Non-Nuclear States for peaceful or civilian purposes only (Kwong 2023). The adoption of the programme in Iran is a measure to catalyse energy transition from fossil fuel/oil dependence to nuclear energy sources (Mousavian and Mousavian 2018). The offer and acceptance of the nuclear technology between the U.S. and Iran reveal the existence of a cordial relationship and trust between their leadership, which is beneficiary to addressing climate change mitigation.

Since 2003, international sanctions have been imposed on the nuclear programme amid security concerns pointed out by states on the suspected clandestine resuscitation and accusation of enrichment of uranium in nuclear facilities in the country for military purposes (Dinler and Balci 2021). These sanctions were considered appropriate due to the perceived violation of the NPT under which the country initiated the programme. It follows that while the conventional wisdom is that nuclear proliferation does not result from civilian nuclear cooperation, which Iran claimed is the orientation of its programme, the assumption is considered incorrect and dangerous because every form of civilian nuclear aid carries the risk of proliferation (Fuhrmann 2009; Juneau and Razavi 2018). More so, there is a connection between the civilian nuclear programme and proliferation due to its dual use and technological know-how (Fuhrmann 2009). Thus, this informed the suspected military intention behind the revival of the programme, the consequent international concern, and the implications for the implementation of the NPT amid security concerns. This serves as the motivation for the study, and it aims to show the impact of the suspicion on the adoption of nuclear technology in the global energy transition.

The security concern with the nuclear programme stems from the dual capability for the production of weapons for military goals and the pursuit of civilian purposes (Gaietta 2015; Rezaei 2017; Eslami 2024). Iran has, though, reiterated its position that the programme is for peaceful purposes and mainly civilian-oriented; however, there is suspicion that it may decide to pursue nuclear weapons given the power contestation and instability within the Middle East region (Kaur and Raman 2024; Gaietta 2015; Rezaei 2017; Eslami 2024). It follows that a state acquires nuclear technology for reasons including a security threat emanating from within, the regional or global environment and for prestige in the international system (Kaur and Raman 2024). The goal of the Iranian nuclear programme has been argued to extend beyond security to include power modification among states in the Middle East. This is evident in the perception that the Iranian nuclear programme can influence U.S. hegemony in the region, but without thought of its relevance in the energy transition and the deployment of low-carbon emitting sources as nuclear technology.

The possibility of Iran creating a nuclear weapon from the nuclear facilities conjured two perspectives and groups in the comity of nations, with one supporting and

the other opposing the programme. The controversy on Iranian nuclear technology status is better understood from the perspective of the global nuclear order, which is a compromise between unconstrained nuclear anarchy and nuclear disarmament (Egeland 2021). Hussain (2022), for instance, has classified the global powers based on their interests in the Iranian nuclear program largely into two groups, with one group advocating a total rollback and the other supporting verifiable and meaningful limits. The dilemma emanating from the programme could have implications for the adoption of nuclear technology in the clean energy transition and sustainable global peacebuilding. These perceived threats and challenges that the development of the nuclear programme has implied for the Iranian state have revealed the possible challenges and seeming difficulties that intending nations may be confronted with in the adoption of nuclear energy and sustaining global peace. These are the focus of this study.

The contention between the two sets of countries on the nuclear programme revolves around states' compliance, conformity, and sustenance of the NPT. The NPT forms a global security cornerstone, and all countries, especially in the Middle East, with the exception of the state of Israel, ratified the treaty (Alcaro 2021). The treaty is also a cornerstone of the U.S. national security goals (Rees 2023), and this is influenced by the Franck Report of concerned nuclear physicists in 1945 that an international treaty should underlie the control and elimination of the atomic bomb since the U.S. cannot maintain its monopoly (Kwong 2023). President Harry Truman's address to Congress on the matter of controlling nuclear technology is that an international arrangement is key to the reduction of the development of the atomic bomb and sustaining civilisation (Kwong 2023). Nuclear technology is used for the production of the atomic bomb, and to prevent improper possession and use, the NPT was initiated as an international agreement, and Iran is a signatory to it.

Contrary to the signed treaty, Iran is suspected and repeatedly accused of pursuing its nuclear programme for military purposes. In this sense, the US describes Iran as a country with nuclear ambitions and supporting terrorist organizations to strengthen its dominance in different regions of the world, and U.S. President Donald Trump, being an informed figure, was able to identify Iran's weakness and use his country's invincible power in a manner acceptable to the whole world (The White House 2025). The country, Iran, has justified its nuclear agenda as a significant aspect of its national security strategy, but Israel perceives the programme as a threat to its existence (Eslami 2024). The differing perceptions of the two neighbours on the nuclear agenda and the status of the NPT could impact peaceful coexistence within the region. Also, the acquisition of nuclear weapons by Iran can stimulate its neighbours into a quest (Alcaro 2021; Javed and Ismail 2022), and this has implications for world peace and threatens the survival of the NPT. As such, there are recurrent calls for the monitoring of the Iranian nuclear programme due to its normative and security implications for sustainable global peacebuilding (Alcaro 2021; Javed and Ismail 2022). It is believed that a nuclear bomb from a capable Iranian state is a threat to world peace.

The survival of the NPT is projected as a major challenge posed by the programme, and the consequent problem of fostering global peace amid uncertainty resulting from the proliferation of nuclear technology is also a great concern. The programme directly

and indirectly impacts the survival of the NPT in that if the Iranian nuclear programme is not monitored, it may be diverted into military use, and it can indirectly sway Iran's neighbours, specifically Saudi Arabia and countries in this category, to pursue a similar goal (Alcaro 2021). The security implication of the programme is that the U.S. and Israel may embark on a bombing campaign to curb the programme, and the possible outcome of this is that Iran may sway its proxies, inclusive of Iraq, Syria, Yemen, Lebanon and undetermined countries around the world into a conflict of a global dimension (Alcaro 2021). The country may also join suit with countries antagonistic to the U.S. interest in attaining its programme. This may split countries into the pro and anti-NPT alliances, and this will impact the control of nuclear weapons and the fostering of global peace.

To prevent Iran from pursuing its alleged military-oriented nuclear programme and as a means of ensuring security sustenance for the NPT, recurrent killing of Iranian nuclear scientists since 2007 has been reported by the Iranian government and attributed to the state of Israel and the U.S. intelligence (Hussain 2022; Kaur and Raman 2024). There is the adoption of a narrative on the nuclear programme that the Iranian state is a terrorist sponsoring nation, and the country must not be allowed to possess a nuclear weapon (Kim, Park and Yim 2024; Rees 2023). The same countries peddling the narrative have been threatening the programme with an airstrike, engaging in covert sabotage operations to thwart the programme (Hussain 2022; Kaur and Raman 2024), have launched an air attack on Iran's nuclear facilities on the 13th and 21st of June, 2025 and have made threats for further military actions. The duo's hostile relationships have increased awareness and impacted interest in nuclear technology, and can prompt the spill over of the war around the globe. The action and possible reactions may threaten the global peacebuilding strategy of the NPT. The hostile relationship between the two countries, concerns for global peacebuilding, and the sustenance of the Iranian nuclear programme had produced the Joint Comprehensive Plan of Action, JCPOA, which is also known as the Iran Nuclear Deal, in 2015.

The JCPOA was passed by the United Nations Security Council (UNSC) through its resolution number 2231 on the 20th of July, 2015, and made provisions for the endorsement of the Iranian nuclear programme and removed all sanctions with the condition that compliance is demonstrated with the nuclear deal (Javed and Ismail 2022). The deal marked a significant era in the U.S.-Iran relationship and a contribution to global peace because it eased economic and political tension between them. The contribution of the JCPOA is that it allows for the continuity of the nuclear programme, and this is a measure of energy transition in the country. The JCPOA was notable for its relieve of the Iranian state from economic sanctions on its oil, there was an increase in trade relations with the European Union, EU, to the tune of 63 per cent, and international companies were allowed access to signing contract in automotive, oil, and commercial aircraft (Dinler and Valci 2021). In addition to the economic gains, the pariah or rogue narrative and the war threat against the Iranian state were dropped (Dinler and Valci 2021). This eases tension and implies a new dimension of global peacebuilding; still, concerns were raised by the U.S. on the nuclear programme embarked upon by the country.

The withdrawal from the JCPOA of 2015 by the U.S. in 2018 has since triggered another round of tensions between the two countries. The argument of the U.S. for quitting the agreement was due to concerns about the operations of the Iranian state in the region and the restrictions from the agreement (Eslami 2024; Mousavian 2023; Kerr 2017) remarked that the JCPOA was dead due to the maximum pressure campaign by the Trump administration against Iran, and as such, requires revival for it to work.

Evident from the above are the challenges confronting the encouragement for the adoption and control of nuclear technology in the global energy transition campaign. Hence, while studies have been conducted on the subject matter of the relationship between the U.S. and Iran, there is an absence of a study that examines the implications of the hostile relations for the adoption of nuclear technology in the energy transition. Extant studies have not been integrated to answer questions that are recurrently asked about the implications of their relationship for global peacebuilding, hence this study. The study aimed to analyse the implications of the Iranian nuclear programme-induced hostility between Iran and the U.S. for nuclear technology adoption in the global energy transition and international peacebuilding (Herzog 2025).

The study is significant and worth execution because it provides information on the campaign for other sources of energy, other than nuclear energy technology, despite the renewed interest in nuclear sources of energy by states across the globe, especially in the era of energy transition. The study provides insight into the hostile relationships between Iran and the U.S. The study has five sections that aided the accomplishment of its stated objective. The background to the study formed the focus of section one. The literature review is presented in Section two. In section three, the methodology of the study is discussed. Section four presents and analyses data on the stated objective of the study. The conclusion is drawn, and the recommendation is provided in section five.

The Choice Issues of Nuclear Energy Technology in Global Energy Transition

The sharing of nuclear technology between the *haves* and the *have-nots* has been made possible by the Atom for Peace programme of the UN. It has been reported that since the programme, more than 2000 bilateral civilian nuclear cooperation agreements (NCAs) have been signed with pledges of transferring nuclear technology, materials, and knowledge for peaceful purposes (Fuhrmann 2009). Also, as of July 2009, the International Atomic Energy Agency reported that more than 52 countries signified interest in the construction of their first nuclear power plant (Jewell 2011). This shows the preference and aspiration for nuclear energy by states as a solution to energy issues.

Nuclear technology is significant in the current effort to mitigate global warming and meet the increasing energy demand. Sadekin et al. (2019) have noted that the increase in energy demand continues every decade, and coal, gas, and oil have proven incapable of meeting the requisite energy and the contemporary pressure on it will enhance their extinction between 2050 and 2100, and the solution to this is the adoption of nuclear technology. Equally, Muellner et al. (2021) have claimed that the increase in climate change awareness has stimulated a renewed interest in the use of nuclear energy, and while it has been observed that temperature has continued to rise in

the past 50 years due to the uncontrolled emission of greenhouse gases, nuclear energy is notably contributing to low carbon economy (Matthew 2022). It is sufficient to note that the production and consumption of energy have been identified as the fundamental factors responsible for greenhouse gas emissions and influencing climate change (Lin and Ullah 2024). To address the climate and environmental issues emanating from the emission of greenhouse gases, GHG, there is an increased desire for the deployment of nuclear energy in power generation to mitigate the challenge.

Nuclear technology has been identified as one of the measures to control climate change, and it is useful as a civilian technology. The NCA is reportedly signed by countries seeking a solution to climate change issues, adopted as an alternative to the shortage in energy accessibility, and addressing increasing oil prices (Fuhrmann 2009). Nuclear power is a low-carbon energy source, and it is considered a suitable option for the energy transition. Sadekin et al. (2019), having compared the source with other energy forms, noted that though it is not carbon neutral, it emits a limited quantity of carbon. It has been noted that a total of 442 nuclear power reactors are in operation around the world, are responsible for the generation of 393 GWe of electricity, and the generation represents a total of 11 per cent of electricity generated around the world (Matthew 2022). The operation of these nuclear power plants is considered a solution to energy issues in host countries.

The question raised by the number of nuclear energy plants in operation around the globe is the possible criteria to be met by countries desire to meet. Jewell (2011) has identified the criteria for the deployment of nuclear weapons into the technical and socio-political requirements. The technical requirement for the deployment of nuclear technology has included the national grid size, the existence of international grid connections and fuel supply security for electricity generation (Jewell 2011). The socio-political requirements are such that countries featuring privately owned nuclear facilities are usually wealthier, larger, and politically stable economies with high government effectiveness (Jewell 2011). There is more emphasis on the social-political requirement, and as such, politically stable economies and government effectiveness, as a criterion, can be taken to imply an established political regime, and a country without a stable political atmosphere may not be considered qualified. Democratic government may be deemed the appropriate effective government. It can be deduced that the state not having this feat may imply risk for the establishment of the technology.

The deployment of nuclear technology is not free from risks, both from environmental and energy security, and the proliferation of weapons of mass destruction. Jacobson (2020) has analysed the risks of nuclear energy and classified the challenges into two categories. In the first category of risk of using nuclear energy is the challenge of reducing global warming and air pollution, and the issues here include the delay between planning and operation, its emission contribution to global warming, and the cost implication of constructing a new nuclear power plant is estimated at 2.3 to 7.4 times of those of the wind and solar, and a period of between 5 to 17 years before it becomes operational, and also contribute between 9 to 37 per cent of emission. However, innovations such as advances in large reactors, advanced fuel, and small modular reactors, and breakthroughs in engineering with the capacity to extend

the operation lifetime of existing reactors and development in waste management have made the use of nuclear technology attractive as an energy option (Mathew 2022). Hence, nuclear energy has enjoyed improvements to better serve the purpose of efficient energy in combating climate change challenges.

Also, the second category of risk identified includes the capability of the facility to ensure environmental and energy security and the risk in this class includes proliferation of weapons, radioactive waste challenges, and meltdown of reactors, land despoilment risks, and mining cancer (Jacobson 2020). One of the global campaigns against the use of nuclear energy is the possibility of the production of an atomic bomb, which constitutes a threat to global peacebuilding. Thus, ensuring the responsible use of the technology has resulted in global nuclear orders. The global nuclear order has been described as evolving norms, practices, and institutions governing the use and development of nuclear technology worldwide (Egeland 2021). Hence, the deployment of nuclear energy is regulated but not anarchical.

However, while there are rules and regulations such as the NPT to govern its development and use, Fuhrmann (2009) has argued that the trade in nuclear activities under the NPT can endanger national and international security. Thus, the conflict over Iran's nuclear programme has left much to be desired in this respect.

A Review of National Interest Clashes with International Treaty in Iran-U.S. Relations on Nuclear Technology Aspirations

The Iranian nuclear programme has redefined the U.S.-Iran relations since the introduction of the Islamic Republic of Iran (IRI) in the aftermath of the 1979 revolution. It follows that while diplomatic relations between Iran and the U.S. started in 1883 (Meier and Vieluf 2021; Hussain 2015; Goode 1989), the discovery of oil in the country strengthened commercial ties between the two countries, with American oil companies developing trade relations with the Gulf state (Hussain 2015). The emergence of Mohammad Mossadegh as the Prime Minister of Iran affected the relationship between the country and the west in that the administration was nationalistic in orientation and as such nationalised a host of foreign investment inclusive of the Anglo-Iranian Oil Company in 1951, and the action provoked anger from the British, and the subsequent removal of the administration in a sponsored coup by the West (Meier and Vieluf 2021; Goode 1989; Edwards 2014). In the aftermath of the coup, the Mohammad Reza Shah administration was installed and ruled in line with the British and U.S. interests.

During the Shah's administration, the nuclear programme was established through the 'Atom for Peace Program' in the 1950s. Hence, while Iran had anticipated in the 1970s that the burgeoning population in the country could not be provided with the needed energy, and with the supporting evidence from the U.S.-based Stanford Research Institute in 1973, there was a forecast and suggestion for the generation of 20,000 MW of nuclear electricity by the 1990s. This informed the decision of the Shah administration to construct 20 nuclear power reactors (Hussain 2015). The administration of Shah equally took membership of the NPT in 1968 and signed it in 1970 (Hussain 2015). The development is evidence of a cordial relationship between the U.S. and Iran, and this is from the pre-revolution era.

The Iranian nuclear programme was completely shut down following the 1979 revolution (Hussain 2015). However, there was an effort to resuscitate the programme in the 1990s, an effort that had led to the construction of more advanced nuclear facilities, and the desire for the creation of more facilities across the country (Hussain 2015). During the period, the country sought the assistance of countries like China and Russia in the resuscitation and completion of its abandoned nuclear projects (Hussain 2015; Gaietta 2015; Rezaei 2017; Eslami 2024). The period is tagged post-revolution in literature. It was during this period that it was rumoured that Iran was using clandestine networks to achieve the enrichment of its nuclear facilities, and this raised suspicion of its aspired military goal.

The development prompted the introduction of sanctions on the programme between 2000 and 2015. There were attempts to stop and roll back the programme, but it was not possible (Hussain 2015; Eslami 2024). The reality encouraged the JCPOA, which was signed in 2015. Evidently, since the diplomatic agreement, the relationship between the two countries can be categorised into pre- and post-revolutionary, the era of sanctions, and the diplomatic phase (Eslami 2024). Also, while the U.S. had quit the JCPOA of 2015, there is continued campaigning against the programme. The measures deployed to fight the Iranian nuclear programme have included a narrative of terrorist sponsorship.

Contrary to the extant rogue state narrative, the diverse political groups or perspectives on the nuclear programme in the country have been classified basically into two, which are *pragmatists* and *principality* (Hussain 2022). The classification followed the agenda pursued by each group concerning the nuclear programme. The pragmatists, consisting of moderates, reformists, and liberals, opine that Iran does not need a nuclear weapon programme for an immediate purpose, but it is necessary to acquire the technological capability. To sustain the goal, they subscribed to using foreign policy as a negotiating tool to avoid isolation and détente with the West (Hussain 2022). The goal of the group concerning the nuclear programme pursued by Iran is to acquire the requisite knowledge.

The principalists, on the other hand, are championed by the Alliance of Builders of Islamic Iran, often shortened as *abadgaran*, formed in the year 2003 and guided by the belief in the absolute development of the nuclear program without recourse to the NPT. The orientation of the group is that developing nations should be able to acquire nuclear technology without impediment from other nations, just the way developed states have done (Hussain 2022). The two groups believed that Iran needs the nuclear programme, but the goal differs, and this is not known in the international system, as many subscribed to the monolithic narrative against the country.

In the perception of the principalist, the NPT and the International Atomic Energy Agency (IAEA) are instruments of the colonialist for denying the developing world access to nuclear power, and the strategy to accomplish the task is demonstrated in the confrontation of nuclear policies and provocative rhetoric of President Ahmadinejad of Iran (Hussain 2022). While the policies ensure domestic political gain in Iran, it affected the image of the country in the international system, and this is evident in the sanctions imposed on the country for the first time in 2003 since the 1979 revolution

(Hussain 2022). This implies the possible issues a country with such challenges can face concerning the ambitions to acquire a nuclear programme.

An Overview of the Energy Sector in Iran

Hitherto, the generation of electricity in Iran has primarily been achieved through the use of fossil fuels. The supply of electricity in Iran is dependent on fossil fuels (Aryanpur, Atabaki, Marzband, Siano and Ghayoumi 2019; Pourkiaei, Pourfayaz, Shirmohammadia, Mossavi and Khalilpoor 2020). The majority of states, like Iran, also generate electricity through the use of fossil fuels, and the implication of this is the generation of GHG emissions and climate change (Khojasteh, Khojasteh, Kamali, Beyene and Iglesias 2018). The generation of electricity from such sources implies electricity blackouts in the hot season and also raises concerns about ensuring energy security in the country (Pourkiaei et al. 2020), and it imposes a financial burden on the country (Aryanpur et al. 2019). Of course, the country has the potential to generate electricity from renewable energy such as solar, wind, and the use of biomass.

The country's due to its location in the Sun Belt, has a mean solar radiation of about 2200kWh/m² per annum, which is greater than the global average (Pourkiaei et al. 2020). While the country is building 550MW of renewable energy, the total wind installed capacity is about 259MW, mostly situated at Manhil and Roodbar (Pourkiaei et al. 2020). The country is switching to renewable sources to generate electricity. The renewable sources have not been maximised as the best alternative to energy sources in Iran due to the challenges confronting it. Khojasteh et al. (2018) looked at the issue of marine energy production in Iran but noted that the problem with this source is that it has not received any legislative or business attention. Also, Oryani, Koo, Rezania, and Shafiee (2021) have acknowledged challenges to the development of the solar PV, biomass, and wind turbine, which are the three alternatives, and the issues have been grouped into institutional, technical, political and regulatory, behavioural, social, cultural, and economic and financial.

The problem of the development of alternative sources of energy and the challenges with nuclear technology have revealed the possibility of energy poverty in Iran (Soltani, Imani and Imani 2026). To ensure the accessibility to clean energy as declared in the Sustainable Development Goal, there is a need for a rethink on Iran's energy sector.

Thus, the theoretical basis of the study is offensive realism, which argues that the desire for power maximization, self-interest, and fear of other states are the conditions responsible for the conflicts and competition observed in the international system (Johnson and Thayer 2016). The survival of states in the international system underlined their reason for exhibiting such behaviour (Johnson and Thayer 2016). This is adopted and applied to this study from the perspective that nuclear technology is aimed at maximising power and ensuring attainment of goals, and this is the reason why countries are subscribing to it.

An integrative review is the method of study due to its appropriateness in addressing both new and mature topics, as well as its suitability in achieving a new perspective through the evaluation, critique, and synthesis of literature (Kitano 2016; Adem 2024). The U.S.-Iran nuclear technology-induced hostility, and the implications

for the choice of this technology, are a mature topic with contemporary relevance for generating insights into the possible choice of technology in the energy transition (Bowen, Esfandiary and Moran 2016; Khan 2024). The method is considered appropriate for this reason. The method synthesises perspectives from five purposively selected articles. The articles are selected based on their relevance to the subject matter of the discussion. Information obtained were content analysed and thematically presented.

Nuclear-fueled hostility in Iran-U.S. relations: What implications does it have for global energy transitions?

Nuclear technology has become a major issue in U.S.-Iran relations, as the adoption of the nuclear technology program became an international crisis of mutual interest following the 1979 Islamic Revolution (Bowen, Esfandiary and Moran 2016; Khan 2024). The revolution transformed the political and social situation in Iran and disrupted friendly relations with the West. Consequently, following the U.S.-UK coup in 1953, Iran became a key ally of the West, and nuclear aid to the country during the Shah's reign was a measure to ensure adequate and appropriate support. The U.S. provided necessary material and technical assistance, as well as training for Iranian scientists (Bowen, Esfandiary and Moran 2016; Khan 2024). Historically, successive U.S. presidential administrations have taken different approaches to providing assistance to Iran's nuclear program, including fuel supplies, technology transfer, and training. This has led to conflicting public perceptions of both the U.S. administration and its political and spiritual leaders in Iran (Kamel 2018; Valadbaygi 2023). The ousting of the Shah administration in the 1979 revolution implies a loss for U.S. hegemony in the Middle East, and relationships between the two countries in the post-revolution in Iran further aggravate the bitterness in their relationship (Hussain 2015). It was reported, for example, that the bombing of the U.S. embassy in Beirut by Hezbollah was with the financial and logistical support from Iran (Kortunov and Timofeev 2021). Thus, it has been explained that the U.S. had interfered in Iran's internal affairs in 1942 and 1953, and still believes that regime change in revolutionary Iran is possible in its interests (Hussain 2015). Thus, the Iran nuclear weapon controversy is pointed as a measure aimed at facilitating regime change in Iran in the interest of the country.

The introduction of sanctions on Iran for clandestine resuscitation of the programme, the production and failure of the JCPOA of 2015 are attributable to the U.S. actions. The action of the U.S. has encouraged the emergence of two classes of countries on the Iranian nuclear programme, with one supporting a total rollback and the other advocating limited and verifiable enrichment (Hussain 2022). The programme also recently suffered an attack from the U.S. and the state of Israel. Despite the confrontation with Iran, there is a report from the IAEA that nations are signalling interest in the possession of nuclear technology (Jewell 2011).

The question of interest here is why states continue to nurture ambition for nuclear technology despite the issues Iran is confronted with, and under what circumstances can a state be given the technology? The considerations have been listed by Jewell (2011) to include effective government and politically stable economies. The

challenges with the Iranian nuclear programme ensued from its failure to meet the outlined requirements of stable political economies and effective government. The recurrent desire for the programme is also better explained from the theoretical framework that power-maximising, self-interest, and fear of other states are the conditions responsible for the conflict and competition witnessed in the international system.

Conclusion and discussion

The study analysed the implications of the Iran-U.S. hostility for the adoption of nuclear technology in the global energy transition, with the assumption that the hitherto hostile relationship between the two countries would impact the countries' choice and preference for nuclear technology as a measure in the energy transition. Offensive realism was adopted and applied from the perspective that power-maximising, self-interest, and fear of other states are the conditions responsible for the conflict and competition witnessed in the international system. The survival of states in the global system underlined their reason for exhibiting such behaviour in their relations with other states. An integrative analysis approach is employed as the method of data collection for this study, and five published journals were purposively selected for analysis based on relevance to the study. The study noted that Iran's nuclear issues do not affect the desire for the technology. There are criteria to be met before a country can be given nuclear technology, and these include the technical and the socio-political; emphasis is placed on the socio-political criteria. The study concluded that Iran-U.S. hostile relations have not implied interest loss in the adoption of nuclear technology. The study recommends that Iran needs to embrace more of the socio-political requirements as a measure to enjoy the nuclear technology.

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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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**STEPIĆ, MILOMIR. 2023. GEOPOLITICAL GLOSSARY OF THE BALKANS,
BELGRADE: CATENA MUNDI, 536 PP. (IN SERBIAN)**

**СТЕПИЋ, МИЛОМИР. 2023. ГЕОПОЛИТИЧКИ ПОЈМОВНИК БАЛКАНА,
БЕОГРАД: CATENA MUNDI, 536 С.**

Review by:

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Abstract

This review examines the lexicon *Geopolitical Glossary of the Balkans* by Milomir Stepić, published in 2023 by Catena Mundi (Belgrade, Serbia). The volume provides an encyclopedic overview of key topics shaping the geopolitical context of the Balkans. Although written from a distinctly Serbian perspective, it offers readers an essential reference work that illuminates a wide range of regional geopolitical issues.

Keywords: *Geopolitics, Glossary, Balkans, Serbia, Southeast Europe.*

The publication under discussion is a reference work, comprising 536 pages of brief entries that address life in Southeast Europe. The jacket copy positions it as a scholarly overview, the first such work in Serbian to depict the reality of the Balkans. This framing also signals its anchoring in a distinctly Serbian geopolitical perspective. The author, Milomir Stepić, is a geographer with extensive knowledge of economics and politics, positioning him well to compile a reference work on such a complex region as Southeast Europe.

The concise, two-and-a-half-page preface explains the publication's background, thematic context, and the distinctive characteristics of Southeast Europe. Historically, major European powers have repeatedly attempted to advance their interests in the region, resulting in a complex, dynamic, and conflict-ridden geopolitical landscape (p. 7). Furthermore, it becomes evident that global political actors continue to test the limits of their power and compete for influence in this geographical area (ibid.). Given that this is a multidimensional and highly heterogeneous cultural landscape, the selection of entries for inclusion already poses a fundamental challenge. Consequently,

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the work assumes an encyclopedic character; nonetheless, the problem of territorial delineation remains unresolved (p. 8). This is noted by, among others, Balkanologist Predrag Mutavdžić, who explores in detail various approaches to the (imagined) demarcation of Southeast Europe (Mutavdžić 2013, 29).

Stepić goes on to address the conspicuous fact that, despite negative stereotypes associated with this region (p. 8), the term “Balkans” was chosen for the book’s title rather than “Southeast Europe”.

It is to be expected that a Serbian reference work would place a notable emphasis on the former Yugoslavia. Such emphasis is also motivated by the specific nature of this now-defunct state itself, in which “ethno-engineering” was practiced and new “instant nations” were proclaimed (*ibid.*). Crucially, however, these processes affected not only the former Yugoslavia but also other states in the region, and, to the politicized recognition of several new languages in place of a single, variegated linguistic continuum. For instance, whereas before the dissolution of Yugoslavia, there was talk of a “Serbo-Croatian” or “Croato-Serbian” language, today one largely speaks of Serbian and Croatian, in addition to Bosnian and Montenegrin—all based on the same dialectal foundation. Another example is the debate surrounding the status of Macedonian, which in Bulgaria is still often considered a variant of Bulgarian. Explaining additional attempts to develop other smaller linguistic varieties yet further increases the complexity of this picture, all of which illustrates why Southeast European anthropology, demography, ethnography, history, geography, and politics are so distinct within the European context, as are the region’s underlying spatial structures. It also shows, however, that geopolitical processes in this area continue to exert a lasting influence on linguistic sensitivities.

Following the volume’s introductory remarks, a table of contents (pp. 11–23) lists the volume’s individual entries, a selection of which warrants closer examination. Even at a glance, it is evident that the book’s focus is on the territory of the former Yugoslavia, with considerably more specialized information on this region than on countries such as Bulgaria, Romania, Greece, or Albania. It is therefore instructive to first examine specific territorial details and related aspects. For one, the Montenegrins are characterized as a “typical instant nation”, separated from the Serbs in order to weaken Serbia’s role in many respects (p. 503). This background also explains why Montenegrin is referred to here as a “so-called language” (p. 504). The discrepancy between linguistic and ethnic self-identification in Montenegro is noteworthy: while the majority identify as ethnic Montenegrins, most designate their language as Serbian (*ibid.*). This dynamic is unique within the former Yugoslavia and fundamentally differs from that of the other successor languages of Serbo-Croatian. Unlike Montenegro, however, Serbia has not recognized Kosovo as a state. Here, too, the volume’s Serbian geopolitical perspective makes itself known: Kosovo is still considered an autonomous province (Serbian: “аутономна покрајина”) and therefore an integral part of Serbia (p. 276).

Beyond territorial aspects, the work addresses ethnic aspects by cataloguing the major communities living in Southeast Europe. These include titular nations such as Croats, Albanians, and Turks. A closer look at these three groups reveals that they live not only within their respective states but also beyond their current borders.

Consequently, the phenomenon of cross-border settlement areas is central to understanding regional demographics. Croats, for example, constitute an extensive community in Bosnia and Herzegovina, while compact Albanian settlements are found in southern Montenegro (Giesel 2023), and Bulgaria is home to a large Turkish minority. While the geopolitical perspective points to the current economically and expansionistically motivated concept of the “return of Turkey to the Balkans” (p. 462), it must also be noted that the region’s Turkish minority has often been a pawn in geopolitical power struggles (Hacı 2022). This dynamic naturally also applies to other stateless minorities discussed in the book, such as the Bunjevci in Serbia, Croatia, and Hungary (p. 99), the Gorani in Albania and Kosovo (p. 163), the Pomaks in Turkey, Bulgaria, and Greece (p. 366), and the Aromanians in Greece, North Macedonia, and Albania (p. 500), to name just a few.

Ultimately, the volume serves as a valuable resource for understanding the Serbian geopolitical perspective on the reality of Southeast Europe. It contains a wealth of entries, compiled and curated with scholarly rigor over several years. Engaging with its findings facilitates a deeper understanding of Southeast Europe and, above all, reveals the rationale behind its specific geopolitical viewpoint. A comparison against equivalent works from Turkey, Greece, Croatia, or Bulgaria would undoubtedly reveal divergences, yet this is precisely where the publication’s added value lies: it consolidates the current state of knowledge on topics subject to culturally specific geopolitical interpretations. It is undoubtedly worthwhile to engage with this perspective, though ideally in dialogue with others, in order to gain a nuanced overview of this highly heterogeneous region of Europe. In this endeavor, the book under discussion makes a significant contribution.

Conflict of interest

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

Ethical standards

The author affirms that this research did not involve human subjects.

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Abstract

This book analyzes the various dimensions of digital humanism, taking into account the transformation of democracy, economics, and culture. At every level of modern life, from global politics to everyday routines, the past few decades have seen dramatic changes. In this new reality, critically important is not only the emergence of a new information and communication field that has radically transformed the familiar infrastructure of social life, but also the explosive growth in the pace of change caused by the breakthrough development of digital technologies. In this context, numerous questions arise, not so much related to the experienced consequences of the transition to a digital society, but rather to the continuation of these changes and, more importantly, their unprecedented speed, driven by the radically increased rate of change in the technological and, consequently, social environment. This latter factor dramatically narrows the horizon of foresight and makes even the medium-term future so multifaceted that it becomes almost uncertain. The relevance of this research topic is also determined by the insufficient development of theoretical approaches to international legal regulation of digitalization and digital security in the field of information and communication technologies, the rapid development of the digital environment, and the lack of systemic international legal regulation of relations within it.

Keywords: *artificial intelligence, digitalization, moral dilemmas, digital optimization, human self-determination, digital education, transhumanist temptations, internet communication.*

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The uniqueness of the current historical moment lies in the fact that fundamental changes are occurring in real time, creating both unprecedented opportunities and challenges that humanity has never faced before. In this regard, it is important to note that the phenomenon of hyper-fast development is emerging simultaneously with the advent of digital technologies, which are unique in that, while exerting a colossal impact on the entire technological and social infrastructure, they themselves require minimal material resources and minimal environmental change (Nida-Rümelin and Weidenfeld 2022, 1-5).

Thus, ultra-fast development is a characteristic of the dominant progress of digital, information, and communication technologies. Consequently, both phenomena—the historically instantaneous advent of digital civilization and the practically abrupt increase in the rate of change—are inextricably linked.

Another crucial feature of the current stage of development is that, for the first time in history, its defining direction is progress in infocommunications and cognitive technologies. Technology has entered the holy of holies, the sphere that makes humans rational and distinguishes human society from all other biological communities. Accordingly, the ultra-fast development of digital technologies predetermines the inevitability of fundamental social shifts that are unfolding before our eyes and are embodied in such still-new concepts as the information (digital) society, digital civilization, digital world, information (digital) age, and information (digital) revolution (Nida-Rümelin and Weidenfeld 2022, 7-12). In this regard, a philosophical understanding of the new reality (including its social, ontological, epistemological, and anthropological aspects) is urgently needed. This reality is defined by the development of infocommunication (digital) technologies, with their inherent unprecedented speed and simultaneously critical impact not only on the entire technological infrastructure but also on human society and humans themselves, whose biological uniqueness is determined primarily by the ability to accumulate, analyze, and transmit information (Nida-Rümelin and Weidenfeld 2022, 13-18).

The identified problematic field determined the choice of topic and defined the purpose and objectives of this research, which is in line with the ongoing intensive public debate on this highly relevant and multifaceted issue. An analysis of existing strategies for digital humanism and the information society has allowed us to identify and reveal the specific characteristics of the emerging information society culture: the high (dominant) role of information, the global and pervasive influence of information technology on all spheres of human life, and a systemic crisis of responsibility manifesting itself at all levels (Nida-Rümelin and Weidenfeld 2022, 31-34). It has been established that the state of modern society is determined by a state of hyper-struggle between one cultural code and another, leading to the deinstallation of traditional value systems and the assertion of principles of axiological pluralism and relativism, which, in turn, leads to the destabilization of responsibility as a fundamental principle for building sustainable social relations. Indicators were identified that allow us to assess the state of responsibility in the culture of the information society (Nida-Rümelin and Weidenfeld 2022, 19-24). These indicators included attitudes toward information, knowledge, education, freedom, material values, consumption, poverty, violence, and others. It was confirmed that the imbalance between the technical and ethical levels of

societal development leads to a further erosion of responsibility—ethical, political, economic, and legal—both at the level of individual subjects (individual responsibility) and society as a whole (collective responsibility), and, as a consequence, to a systemic crisis of responsibility (Nida-Rümelin and Weidenfeld 2022, 25-29).

Information and knowledge, as the most important phenomena in any society, possess different axiological characteristics in different societies depending on the degree to which the principle of responsibility is expressed. In the culture of the information society during its formative years, it is information that is most valuable, while knowledge is gradually losing its significance (Nida-Rümelin and Weidenfeld 2022, 53-56). The transformation of knowledge from systemic and holistic to discrete is one indicator of society's reorientation from the principle of responsible behavior to irresponsible behavior. Since information (unlike knowledge) is always social and polyvariable, this precludes the possibility of making adequate decisions and, consequently, makes it impossible to correlate the consequences of such decisions with the principle of responsibility (Nida-Rümelin and Weidenfeld 2022, 47-52). Thus, only knowledge is fully associated with responsibility. The modern understanding of freedom, which presupposes the opposition of the individual with their personal desires and aspirations to society as a constraining force, is also antagonistic to the principle of social responsibility, acknowledging a crisis of individual responsibility and becoming a source of social and interpersonal conflicts (Nida-Rümelin and Weidenfeld 2022, 41-45). The only possible way to alleviate such social tension is the acceptance of freedom based on knowledge and the maximization of individual responsibility (Nida-Rümelin and Weidenfeld 2022, 35-40).

In modern conditions, consumption is transforming from a purely economic process into a socioeconomic one, as the purpose of consumption is not so much the satisfaction of vital needs as the symbolic self-realization of the individual. The pervasive orientation of society and individuals toward unlimited consumption, as well as the deliberate stimulation of excessive consumption, are indicators of the mutation and hypertrophy of individual social and economic responsibility, as well as the deformation of collective social and economic responsibility. The emergence of the concept of corporate social responsibility can be seen as one of the ways society can protect itself. It allows for the resolution of existing contradictions between the modern economy and morality, business and the individual, and personal and public interests (Nida-Rümelin and Weidenfeld 2022, 65-68).

Digitalization, primarily the spread of information and telecommunications technologies, continues across humanity. This process serves as the foundation for changes in living conditions, meaning it is not simply a technical and technological process, but also a social and cultural one (Nida-Rümelin and Weidenfeld 2022, 57-64). Therefore, digitalization is moving into the realm of political research and is analyzed as a key factor in concepts of the transformation of modern society. Since the end of the last century, an information and communications environment has been formed in developed countries, thanks to the development of information and telecommunications technologies. Although this environment has not yet fully developed in transitional societies due to historical and sociopolitical factors, its development is nonetheless gaining momentum.

In this regard, it seems appropriate to examine, at a sociological level, the development of a society's information and communications environment and the social and cultural consequences it initiates as one of the fundamental conditions for the transformation of modern society. Research into the development of the information and communication environment in a transitional society is particularly relevant in the context of mature institutional transformations, as the process of adaptation to everyday activities through the use of information and telecommunication technologies begins. This leads to changes in the forms of political institutions, the ways in which they function, as well as their place and role in the social and cultural dimensions of digital society (Nida-Rümelin and Weidenfeld 2022, 69-73).

In the digital environment, there is an urgent need to analyze and restructure the categorical system of institutional analysis as a whole. A need has arisen to theoretically understand the common threads in the process of institutional transformations in digital society, taking place in the context of the development of an information and communication environment. In sociology, research is more focused on practical solutions to improve, rationalize, and enhance the effectiveness of existing social institutions. While not denying the importance of such research in the context of overcoming a protracted systemic crisis in post-reform societies, I would like to point out that today, a qualitatively new society, institutionally speaking, is emerging due to the reorganization of social relations under the influence of information and telecommunications technologies. At the same time, reaching a new methodological level is imperative, as it requires a rethinking of the nature of social development and a search for methods that allow for a deeper understanding of the essence of institutional transformations (Nida-Rümelin and Weidenfeld 2022, 75-79).

Current Western concepts of institutional analysis do not fully reflect the processes occurring in our society: the former focus on the socioeconomic reform of a society in transition, while the latter cannot be transferred in their pure form to national soil and require theoretical rethinking and adaptation (Nida-Rümelin and Weidenfeld 2022, 97-110). Thus, the relevance of this research is determined by: 1) the emergence of the information and communication environment as a new social and cultural space for human activity; 2) the digitalization of everyday practices within this environment; and 3) the lack of a concept of institutional change that takes this process into account.

The integrated model of the global digital and information space is at an early stage of development, which raises the question of developing a unified theoretical concept of the global information society (Nida-Rümelin and Weidenfeld 2022, 117-124), which, as formulated by the author of this study, includes the following provisions:

- the definition of digital optimization, utilitarianism, and artificial intelligence (AI) is largely determined by human perception of information, the availability of information resources, free access to them, and the realization of the human right to information on a global scale. Information space is a space only when it is reflected in the consciousness of an individual, who determines the breadth and content of the information space. This comprehensive model of digital humanism links information society, information space, and information law. Other concepts of digital virtuality exist in the legal literature, based on territorial, technological, or functional approaches, which, in principle, do not

contradict the concept of global information space presented by the author of this book, as they explore this concept from different perspectives;

- the emergence of a global digital space is the result of millions of people worldwide exercising their internationally recognized right to information. Consequently, the global information space is subject to international legal regulation. The global information space is formed on the basis of all information that a person can obtain in the information society. The boundaries of the global information space are the limits within which information is transmitted and disseminated in the information society.
- based on the factors of information exchange in the information society, the socio-economic aspects of digitalization can be identified. According to the author of this study, the network space is a part of the global information space limited by the framework of communication (digital interactive) networks, which provides the right to make information available to the public interactively. An example of a network space is the digital interactive network, the Internet, which is associated with the issue of autonomy and determination in the digital world.

In the context of digital virtuality and internet communication, the ethics of communication between humans and AI is of key importance, as the mechanisms for protecting human rights and extending moral responsibility in the global information space have been fundamentally transformed by information and digital technologies (Nida-Rümelin and Weidenfeld 2022, 81-86). In the context of protecting human rights and freedoms, there are four main criteria for such changes:

- the ability to preserve digitally recorded images, texts, and sounds of human rights and freedom violations facilitates the electronic delivery of these images, texts, and sounds to consumers via the global internet;
- computer networks are actively shaping a global information market, in which previously established territorial boundaries for information exchange are blurring, becoming increasingly transparent;
- the diversity and increasing number of digital formats are used in a wider variety of contexts than ever before;
- the vast majority of processes related to obtaining consumer permission to use copyrighted works and rights to individual human rights and freedoms are currently carried out through computer processing of information and electronic databases. These circumstances, the formation and development of the information society, have initiated the development of mechanisms applicable to the protection of human rights and freedoms in the information space.

In the context of a knowledge society, important dimensions of this study include robots, digital simulations of emotions, autonomy and determination in the digital world, digital optimization, utilitarianism and AI, moral dilemmas, the ethics of online communication between people, the cultural aspects of digitalization, digital education, transhumanist temptations, and other issues that arise in the process of ensuring security in the use of information and communication technologies (ICTs). In this context, the principles and norms of international law, the norms of national legislation

applied to ensure digital security in the use of ICTs, and the practice of their implementation are considered (Nida-Rümelin and Weidenfeld 2022, 87-95).

Therefore, the development of a set of theoretical provisions on the international legal regulation of digital security in the use of ICTs has the following objectives: 1) identify various approaches to regulating digital security in the use of ICTs and determine their specific features; 2) to formulate conceptual approaches to information and communication technologies and regulation of digital security in the sphere of their use in the doctrine of international law and to assess the validity of identifying a new branch of international law, the subject of which is international legal relations in the information sphere; 3) to generalize and disclose the normative-legal and doctrinal bases for regulating digital security in the sphere of ICT use in developed and underdeveloped countries; 4) to outline the prospects for the development of the system of legal support for security in the sphere of ICT use from the point of view of the international legal basis for regulation, as well as the mechanisms of international cooperation in the studied area; 5) to disclose and substantiate the peculiarities of regulating the use of ICT within the framework of international maritime law, as well as to develop recommendations for the progressive development of modern international law in terms of ensuring digital security in the sphere of ICT use in the context of international human rights activities; 6) to identify individual problems and prospects of international legal regulation of the use of ICT in international humanitarian law, as well as to develop recommendations for improving the legal basis for ensuring digital security of ICT in international humanitarian law; 7) develop recommendations for further international legal regulation of digital security in the field of ICT use and its improvement within the UN.

The book argues that an independent branch of international law is in the process of being formed. It assesses the validity of establishing a new branch of digital humanism and international information law, and contributes to its development by formulating its definition, describing the elements that define the field, and conducting a comprehensive study of the international legal regulation of digital security in the field of information and communication technologies.

The scientific novelty lies in the comprehensive study conducted with the aim of generating new knowledge and developing a set of theoretical propositions on digital humanism and international legal regulation of digital security in the field of ICT use. Despite the existence of scholarly works on various sociological and political science aspects of autonomy and determination in the digital world, a comprehensive study of international digital security in the field of ICT use from a digital humanism perspective has not been conducted. To conduct this study, the author of this book examined various aspects of this issue, including digital simulations of emotions, moral and ethical dilemmas, transhumanist and cultural aspects of digitalization, and the ethics of internet communication. The book's novelty also lies in its exploration of issues under-researched in the literature, i.e., a comparative analysis of individual branches of public international law regarding the regulation of digital security in the area of ICT use in education and communication between people and AI. It identifies trends, problems, and prospects that exist in international law regarding the regulation

of ICT use, and offers practical and theoretical recommendations to facilitate the progressive development of international law in this area.

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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