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Journal of Political Science: Bulletin of Yerevan University

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Editor in Chief

Ashot Aleksanyan, Prof. Dr., Head of the Chair of Political Science, Yerevan State University;
Friedrich Schiller University Jena,
E-mail: ashalex@ysu.am

Managing Editor

Magda Arsenyan, PhD in Political Science,
Lecturer of the Chair of Political Science, Yerevan State University,
E-mail: magda.arsenyan@ysu.am

Editorial Board

Alexander Markarov, Prof. Dr., Chair of Political Science, Yerevan State University,
E-mail: amarkarov@ysu.am

Anna Khvorostiankina, PhD in Law, Associate Professor, Head of Law Department, Eurasia International University,
E-mail: anna.v.khv@gmail.com

Arusyak Aleksanyan, PhD in Political Science, Associate Professor of the Chair of Political Science, Research Fellow at the Center for European Studies, Yerevan State University,
E-mail: arusyak.aleksanyan@ysu.am

Bo Petersson, Prof. Dr., Department of Global Political Studies, Faculty of Culture and Society, Malmö University, E-mail: bo.petersson@mau.se

Daniel L. Feldman, Prof. Dr., John Jay College of Criminal Justice, City University of New York,
E-mail: dfeldman@jjay.cuny.edu

Elena Denisova-Schmidt, PD Dr., Research Associate at the University of St. Gallen and Research Fellow at the Boston College Center for International Higher Education,
E-mail: elena.denisova-schmidt@unisg.ch

Fatima Kukeyeva, Doctor of History, Professor of the International Relation Department at Al-Farabi Kazakh National University, Email: fturar@kaznu.kz

Khalid Khayati, Senior Lecturer, Political Science, Department of Management and Engineering, Linköping University,
E-mail: khalid.khayati@liu.se

Narek Galstyan, PhD in Political Science, Associate Professor of the Chair of Political Science, Yerevan State University,
E-mail: nsgalstyan@ysu.am

Nicolas Hayoz, Prof. Dr., Department of European Studies and Slavic Studies, Interfaculty Institute for Eastern Europe and East Central Europe,

University of Fribourg,
E-mail: nicolas.hayoz@unifr.ch

Nora Gevorgyan, PhD in Political Science, Associate Professor, Head of the Department of World Politics and International Relations at Russian-Armenian University. Email: nora.gevorgyan@rau.am

Olaf Leïße, Prof. Dr., Head of the subdivision European Studies, Institute for Political Science, Friedrich Schiller University Jena,
E-mail: olaf.leisse@uni-jena.de

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E-mail: reinhard.heinisch@plus.ac.at

Ria Laenen, PhD, Associate Professor, Leuven International and European Studies, Faculty of Social Sciences, Katholieke Universiteit Leuven,
E-mail: ria.laenen@kuleuven.be

Ruben Elamiryan, PhD in Political Science, Associate Professor of the Chair Psychology and Political Science at Public Administration Academy of the Republic of Armenia,
E-mail: ruben.elamiryan@rau.am

Salome Dundua, PhD in Political Science, Associate Professor of the Department of Political Sciences, Dean of the Faculty of Social and Political Sciences, Ivane Javakhishvili Tbilisi State University, E-mail: salome.dundua@tsu.ge

Simon Clarke, Associate Professor in Political Science, PhD, Director of the Core General Education Program and teaches courses in PPE, Asian University for Women, Bangladesh,
E-mail: srclarke100@gmail.com

Sose Mayilyan, PhD in EU Law from Dublin City University, Ireland, Email: sosemailian@yahoo.com

Todor Georgiev Galounov, Prof. Dr., Department of Political Science, Sociology and Cultural Studies, St. Cyril and St. Methodius University of Veliko Turnovo,
E-mail: t.galounov@ts.uni-vt.bg

Vache Kalashyan, PhD in Political Science, Associate Professor of the Chair of Public Administration, Yerevan State University,
E-mail: vkalashyan@ysu.am

Valentina Gevorgyan, PhD in Political Science, Assistant Professor of the Chair of Political Science, Yerevan State University,
E-mail: valentina.gevorgyan@ysu.am

Vardan Atoyan, Dr., Head of the Chair of Social Sciences at the Armenian State University of Economics, and Deputy Director at the AMBERD Research Center,
E-mail: atoyan.amberd@asue.am

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In this Issue

The current geopolitical standoff between Russia and the West is characterized by unique features, including the ongoing Russia-Ukraine war and hybrid and proxy conflicts waged by authoritarian regimes against Western democracies—all unfolding against the backdrop of modern advancements in artificial intelligence and information-communication technologies. These processes are driven by the ambition of Russia and China to establish global dominance within a new world order—a transition that has been underway for several decades. Amidst this new geopolitical landscape, many nations across various regions are reorienting their foreign and trade-economic policies.

Polarization is intensifying not only between nations but also among individuals; social polarization has emerged as a top global risk in both the short and long term. Defined as a loss of social capital and the fracturing of communities—leading to diminished social stability, reduced individual and collective well-being, and lower economic productivity—social polarization is further fueled by a host of other risks, ranging from debt crises, inflation, and prolonged recession to climate-induced migration. Rising inequality and a widening values gap pose an existential challenge to both authoritarian and democratic systems, as economic and social disparities translate into political divisions. Growing public discontent with government inaction manifested last year in frequent and unmanageable civil protests.

The modern world is undergoing transformative crises; the trajectory of these profound changes amounts to a political, economic, social, and military earthquake. A crucial component of this contemporary mega-crisis is the internationalization of the Russia-Ukraine war, which has laid bare the essence of the geopolitical standoff between Russia and the West—a confrontation that has brought the world perilously close to the risk of nuclear war. The interplay of internal contradictions and conflicts, combined with the aspirations of the ruling elites in the Newly Independent States, has turned these nations into targets of Russian antagonism. In its bid to curtail the independence of these states, Russia justifies its aggressive actions as essential measures for bolstering its own national security. Clearly, Russia is employing a strictly confrontational model in its dealings with the Newly Independent States to tilt the strategic security balance in its own favor, thereby creating a zone of geopolitical alienation and marginalization for these nations.

The West's earlier sanctions pressure on Russia has evolved into a systemic strategic course; its implementation—particularly regarding technology—impacts not only post-Soviet states but also China, India, Iran, African nations, and others. These are no longer merely isolated crisis-related trends or manifestations, but a comprehensive array of crises whose internationalization has become a defining feature of regional, sub-regional, national, transnational, and international affairs.

In their article *'Fragile Independence in a World of Empires: Armenia and the Unfulfilled Promise of Sovereignty'*, Vardan Atoyan, Lonce Bailey, Nushik Petrosyan, Maria Ohanyan, and Diana Matevosyan analyze the geopolitical and economic challenges and risks facing post-war Armenia's independence—factors that significantly impact the country's sovereignty and resilience. The article analyzes the

acute confrontational nature of the crisis in the South Caucasus and its internationalization—driven by the West, led by the U.S., through highly effective hybrid methods—which has sharply destabilized the relatively established balance of power not only in the post-Soviet region but across the global arena. The escalating confrontation has effectively transformed into a hybrid war against Armenia. The once-distinct boundaries between soft and hard power are increasingly blurring, while the hybrid interplay of their fundamental components is becoming progressively more complex. A qualitatively new development is that the hybridization of the war against Armenia is unfolding not only within the context of European integration but also within Armenian-Russian relations, the EAEU, and the CSTO.

In the article '*Beyond the Checklist: Advancing Disarmament, Demobilization, and Reintegration Programs for a New Generation through the Lens of the Gendered Reintegration Experiences of Former PKK Guerrillas*', Kardo Rached, Ahang Habib Hawrami, and Bunyad O. Mohmmmed examine the key stages and mechanisms for improving next-generation disarmament, demobilization, and reintegration programs for former PKK guerrillas. The authors analyze the political and legal mechanisms approved by the Turkish Parliament and government that pave the way for PKK militants to return to a peaceful life in Türkiye. This article analyzes reintegration strategies for a new generation—using the gender aspects of former PKK guerrilla reintegration as a case study—alongside mechanisms for resolving the conflict between military and civilian identities and factors contributing to the successful resocialization of former guerrillas. The article presents the results of a narrative analysis regarding reintegration strategies for former PKK guerrillas. It substantiates the author's position that, alongside the Turkish state, Turkish society must act as a key agent of reintegration: its readiness for dialogue, the creation of an accepting environment, and the recognition of military experience as a socially significant resource all influence the success of the return to civilian life. The article also outlines the resource-based mechanisms involved in the reintegration of former PKK guerrillas. Based on an analysis of personal narratives, the study outlines various reintegration strategies for former PKK guerrillas, identifies a personal disconnect resulting from the conflict between military and civilian identities—as well as a mechanism of maladaptation—and highlights recurring themes in the guerrillas' narratives. It further substantiates the role of Turkish state and societal support not merely as a material resource but also as a symbolic one that differentiates adaptation trajectories.

In the article '*Prerequisites for the formation of socio-political and ideological foundations for Armenia's transition to democracy*', Ashot Yengoyan and Paylak Yengoyan examine the possibilities and challenges associated with establishing the social, political, and ideological foundations of Armenia's transition to democracy. To analyze the democratization of Armenia's political regime, the authors examine the institutions through which the state conducts its political—including international—activities, aiming to determine whether the choice of institutional design (specifically, the choice between presidential and parliamentary forms of government) influences democratic consolidation. In this context, the authors investigate the degree and level of interdependence between socio-economic and ideological factors and the likelihood of establishing and sustaining a democratic regime in Armenia. The article analyzes the

actions of political parties during this transformation, seeking to explain how competing elites—through political bargaining—select the organizational forms and institutions of the new political order, thereby influencing Armenia's democratization and foreign policy.

In the article '*Bridging Sustainable Development and Good Governance Issues in Armenia: Observations on the Interrelationship of Domestic and International Measurements*,' Narine Asryan analyzes issues of sustainable development and good governance in Armenia through the lens of competitiveness and qualitative change. In this context, sustainable development and good governance are linked to globalization, disparities in development levels among countries and regions, the global shift from a unipolar to a multipolar model, and intensifying competition among nations for markets. A fundamental understanding of competitiveness, sustainable development, and good governance in Armenia rests on the capacity of public authorities and the effectiveness of their policies regarding economic transparency, the presence of innovation hubs, the degree of external independence and national security, economic and social stability, and a robust education system. Also essential are a strategy for socio-economic development and a strategy for Armenia's transition to innovation-driven development.

In the article '*Determinants of Legislative Longevity and Survival in the United States Congress: Evidence from Cox Proportional Hazards and Weibull Survival Models*,' Oloruntoba Oyedele examines the key determinants of the tenure and survival of legislators in the U.S. Congress. Understanding U.S. foreign policy decisions is complicated by the specific nature of the American political system, characterized by the competing roles of the President and Congress. In this context, analyzing the contribution of legislators to shaping the dynamics of power relations holds significant practical relevance. Alongside discussions regarding the nature of American interests and the strategic domestic and foreign policy priorities of the U.S. Congress, it is also valid to argue that the clash between the President and Congress drives the dynamics of power in divergent directions, while the meaning of American national interests remains subject to constant reinterpretation.

In his article '*"Big Brother" or "False Ally": Perception of anti-Russian sentiment in the context of the results of the 2026 parliamentary elections in Armenia*,' Artur Mkrtichyan examines the perception of Russia's strategic role in ensuring Armenia's security in the South Caucasus, drawing on the results of the June 7, 2026, parliamentary elections. The geopolitical landscape of the South Caucasus has shifted since 2020, leading to a weakening of Russia's policy position. The author analyzes Russia's actions before and after the 2026 parliamentary elections, noting that these efforts were primarily aimed at fulfilling its role as an ally regarding Armenia's security and economic development. Russian mediation failed to reduce human casualties during the Second Karabakh War, and even the presence of a military base in Armenia and a peacekeeping contingent in Nagorno-Karabakh did not serve as a guarantee of security. The geopolitical isolation of post-war Armenia is a factor necessitating the strengthening of Armenian cooperation with the EU. Armenia's participation in European integration serves as a mechanism for building resilience and expanding EU-Armenia engagement in the political and economic spheres.

In the article '*Polycrisis and the Transformation of International Order: A Systemic Complexity Framework*,' Mohamed Ibrahim Hassan Farag analyzes new and distinct challenges, including emerging risks such as inflation, a crisis in the quality of life, regional and trade wars, large-scale social unrest, geopolitical confrontation, and the threat of nuclear war. The article argues that the polycrisis is a phenomenon of international order transformation, manifesting in the stalling of human development after decades of progress, the rapid and unchecked development of dual-use technologies, and the mounting pressure of climate change impacts—all occurring against a rapidly narrowing window of opportunity for mitigation. In this sense, these risks converge in the coming decade, rendering it unique in its level of uncertainty and turbulence—a decade defined by polycrisis. Many of these risks are already materializing, driving the world toward geopolitical, geoeconomic, and technological fragmentation that hinders global cooperation and limits collective protection against global risks.

In the article '*Geopolitical Rivalry and Economic Vulnerability in Africa: Assessing the Impact of U.S.-Iran Tensions on Trade, Energy Markets, and Macroeconomic Stability*,' Yinka Ibrahim Agbeyinka analyzes the impact of the escalating confrontation and military conflict between the U.S. and Iran on economic stability in Africa. The author focuses particularly on Iran's military and geostrategic position; in its bid to maintain its status as a future regional power, the country is prepared to face renewed tensions and even military confrontation with the U.S. in the Middle East. It is evident that the geopolitical rivalry between the U.S. and Iran can have a negative and catastrophic impact not only on Africa's economic vulnerability but also on the global economy. The nuclear dossier and Western sanctions play a pivotal role in current U.S.-Iran relations, acting as factors that influence Iran's domestic and foreign policy as well as its economic situation.

In the article '*Multiculturalism and the BRICS+: Exploring Emerging Issues and Prospects*,' Esther Oluwaseun Idowu and Oladele Daniel Idowu analyze the BRICS+ partnership, which is grounded in principles of equality and mutual respect and aims to foster intensive multilateral cooperation across economic, political, social, and cultural spheres. According to the authors, the BRICS+ partnership offers a pathway toward the gradual formation of an alternative to the global governance system currently prevailing in the international community. In the political realm, this entails reforming the UN Security Council, jointly countering the threat of international terrorism, and resolving local and regional conflicts exclusively through peaceful means. Economically, the BRICS+ community supports infrastructure projects in developing member states of the trans-regional partnership and advocates for the redistribution of IMF quotas. The article argues that the synergistic effect is a systemic phenomenon arising from the fact that the BRICS+ political system, acting as a unified whole, invariably exhibits characteristics that surpass the sum of the attributes of its member countries. This effect is synonymous with the effect of cooperation and can be observed in the trans-regional partnership of BRICS+.

In the article '*Assessing the Effectiveness of United Nations Humanitarian Interventions in the Democratic Republic of Congo, 1999-2024*,' Halidu Agaba, Aaron Ayeta Mulyanyuma, Charles Akinsola, and Yusuf Abdulganiyu Adegbite analyze the

effectiveness of UN humanitarian interventions in the Democratic Republic of the Congo from 1999 to 2024. During the implementation of this significant international mission, UN humanitarian interventions in the Democratic Republic of the Congo encountered a host of intractable challenges. The authors argue that the effectiveness of UN humanitarian efforts—as the primary international institution for conflict resolution—has notably declined in recent times. The article notes that the UN faces serious challenges in fulfilling its mandate; UN leadership openly acknowledges that the organization suffers repeated setbacks in its peacekeeping missions and proves unable to protect civilians from genocide and suffering. UN humanitarian missions encounter a lack of understanding and support from local governments, which often view these activities as hostile to national interests. Local authorities do not always grant permission for peacekeepers to move across the country, violate ceasefire agreements, and sometimes even orchestrate attacks on UN humanitarian missions. Unfortunately, these missions are forced to operate amidst not only growing mistrust among the local population but also hostility from the country's authorities.

In the article *'Digital Colonialism and the Reproduction of Hegemony in Africa: A Postcolonial Approach'*, Asma Hemaïdia and Khadidja Bouamer analyze the multifaceted issues of digital colonialism in Africa—a phenomenon that transforms colonization into neocolonialism through digital technologies. China's emergence as a major player—viewed in Africa during the 1960s as a “socialist ally,” yet transformed by the early 21st century into a “social imperialist.” At the time, its aid was deemed essential for Africa's digitalization and for creating a market capable of competing with the West. However, the authors argue that this ultimately leads to a “debt trap”—particularly for resource-rich nations—through the provision of loans and grants that the recipients cannot repay. The digital transformation of the African region is proceeding at a rapid pace, while American, Chinese, Indian, and even Russian IT corporations are actively capturing markets across the continent. On one hand, the adoption of digital solutions improves the quality of life for the African population; on the other, however, the real economy is becoming increasingly dependent on foreign digital companies. Consequently, tech giants first gain the opportunity, then the desire, and ultimately the need to exploit this dependency—this lever of control—to steer the economic and political course of African nations.

Editorial Board

FRAGILE INDEPENDENCE IN A WORLD OF EMPIRES: ARMENIA AND THE UNFULFILLED PROMISE OF SOVEREIGNTY

VARDAN ATOYAN* 

Armenian State University of Economics

LONCE BAILEY** 

Shippensburg University

NUSHIK PETROSYAN*** 

Armenian State University of Economics

MARIA OHANYAN**** 

Armenian State University of Economics

DIANA MATEVOSYAN***** 

Armenian State University of Economics

Abstract

This article examines how formal independence translates into effective sovereignty in post-Soviet Armenia, where internal institutional weaknesses and external structural constraints interact. It argues that independence is continuously reshaped and reproduced through patterns

* **Vardan Atoyan** is a Doctor of Sciences (Political Science). He is the Head of the Chair of Social Sciences at the Armenian State University of Economics and Deputy Director at the AMBERD Research Center. Email: atoyan.amberd@asue.am. ORCID: <https://orcid.org/0000-0002-4974-0312>.

** **Lonce Bailey** is a PhD in Political Science, Associate Professor of Political Science at Shippensburg University. Email: lhbailey@ship.edu. ORCID: <https://orcid.org/0009-0006-0871-6769>.

*** **Nushik Petrosyan** is a Researcher of the Center for Social and Behavioral Research at Armenian State University of Economics. Email: nushik.petrosyan@asue.am. ORCID: <https://orcid.org/0000-0002-2843-8202>.

**** **Maria Ohanyan** is a Researcher of the Center for Social and Behavioral Research at Armenian State University of Economics, and PhD student at the Institute of Philosophy, Sociology and Law at National Academy of Sciences of the Republic of Armenia. Email: maria.ohanyan@asue.am. ORCID: <https://orcid.org/0009-0006-3060-7980>.

***** **Diana Matevosyan** is a PhD in Economics, Senior Researcher of the Center for Social and Behavioral Research at Armenian State University of Economics. Email: matevosyan.diana@asue.am. ORCID: <https://orcid.org/0000-0002-1219-7176>.



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of structural dependence. To assess the gap between formal independence and effective sovereignty, the study constructs a composite Structural Dependence Index (SIDI) that combines trade, energy, and military-security dependence on Russia, and applies it to all post-Soviet states over the period 1994–2024. Cluster analysis, combining SIDI values with V-Dem Liberal Democracy Index scores, groups the states by dependence and regime type, and a Markov transition model traces movement between dependence regimes, with Armenia as the focused case study. The results show growing polarization among post-Soviet states and a nonlinear, reversible trajectory for Armenia, whose dependence rises again after a period of partial diversification. Security reliance on an external patron, together with inherited institutional constraints, produces a mirage of sovereignty in which legal independence coexists with systematically limited autonomy. Armenia's sovereignty is thus neither fully consolidated nor permanently lost, reflecting a structural inertia that limits sustained *de facto* autonomy. By demonstrating how post-imperial dependencies are actively reproduced over time, the article contributes to broader debates on sovereignty, small states, and the enduring hierarchies of the post-Soviet international order.

Keywords: *Armenia, dependence index, Markov transition matrix, sovereignty, structural dependence.*

Introduction

One of the defining political developments of global history over the past five centuries has been the gradual transformation of a world of empires into a world of states. Declarations of independence functioned as key markers of this transformation, signaling claims to sovereignty and the emergence or re-emergence of political communities as states. Among these, the American Declaration of 1776 was the first in world history to identify sovereignty with independence (Armitage 2005). It articulated a universal philosophy of human rights applicable not only to Americans but to people everywhere, thereby giving the American Revolution its broader appeal (Armitage 2007). In this way, the Declaration became not only a historical document but also a global ideological repertoire and a normative source of sovereignty, freedom, and self-determination that would sweep the world in the centuries after 1776 (Armitage 2005, 3; The U.S. National Archives and Records Administration 2024). However, over time, deep contradictions emerged between the normative ideas of independence and its political implementation. In the modern international system, characterized by asymmetric power relations (Lees 2012, 210), informal hierarchies (Clark 1989) and external constraints on state power (Vadai and Press-Barnathan 2024), independence often coexists with profound constraints on effective sovereignty (Drobush, Kornuta, and Ukrainets 2025). Independence, therefore, should be understood not as a guarantee of effective sovereignty, but as a contingent and relational condition that may coexist with substantial external constraints.

These constraints are especially pronounced in the case of small states. Building on this insight, a growing body of scholarship emphasizes economic dependence as a key mechanism shaping the foreign policy behavior of post-Soviet states vis-à-vis Russia. Where economic dependence on a hegemonic power is high, strategies of balancing become not only difficult but also costly (Gvalia et al. 2013, 104).

This article examines Armenia's post-Soviet trajectory to explore how formal independence translates into effective sovereignty, shaped by both internal institutional weaknesses and external structural constraints. It shows how independence is continuously reshaped and reproduced through patterns of structural dependence.

To understand this complex situation, the study addresses:

First, how do post-Soviet states differ in their dependence on Russia? This study measures dependence using the Structural Dependence Index (SIDI) constructed for this study.

Second, how have patterns of dependence changed over time? By tracking the dynamics of dependence, cases of persistence, decline, or reversal of dependence are identified.

Together, these questions allow for a dynamic comparative assessment of dependence among post-Soviet states. Such an approach makes it possible to identify transitional phases of dependence, which can serve as an empirical basis for theoretical conclusions about post-imperial dependence.

Additionally, this study addresses two interrelated case-focused questions. First, how has Armenia's independence transformed—or failed to transform—into effective sovereignty?

Second, which dependency trajectory best characterizes Armenia's post-Soviet experience: persistent dependence, gradual decline, or partial transformation? Together, these questions enable a dynamic assessment of Armenia's post-Soviet condition, highlighting both the structural inertia of inherited dependencies and the conditions under which sovereignty may be partially exercised or constrained.

Small States, Sovereignty, and Fragile Independence

The literature on small states in international relations and comparative politics is anchored in the distinction between *de jure* and *de facto* sovereignty. *De jure* sovereignty refers to formal legal independence and international recognition, whereas *de facto* sovereignty captures the effective capacity of states to exercise autonomous authority over core policy domains (Krasner 1999). For small states, scholars consistently note a persistent divergence between these dimensions, resulting in sovereignty that is formally established but operationally constrained.

This discrepancy is particularly salient in analyses of small states situated within imperial and post-imperial orders. Research on empire emphasizes that imperial rule produces durable asymmetries that outlast formal political rupture (Lake 2009). Post-imperial small states often inherit dense networks of dependence—economic, security-related, and institutional—that continue to structure their strategic choices after independence. Comparative studies of post-Soviet and post-imperial transitions demonstrate that independence rarely constitutes a complete break from hierarchical relationships; instead, it involves the reconfiguration of dependence through informal mechanisms and structural leverage exercised by former imperial centers (Beissinger 2002; Bunce 1999).

Contemporary scholarship increasingly conceptualizes sovereignty and autonomy as structurally constrained rather than binary attributes. Small states face inherent limitations stemming from geography, demographic scale, market size, and

vulnerability to external threats, which restrict their room for maneuver irrespective of domestic political preferences (Katzenstein 1985; Keohane 1969). These internal constraints are reinforced by external structures such as alliance systems, regional hegemonies, and global economic hierarchies, which systematically privilege larger states.

Taken together, the literature converges on the view that independence for small states is best understood as *fragile*: a dynamic condition shaped by asymmetric power relations, inherited dependencies, and enduring structural constraints embedded in the international system.

Armenia's Post-Independence Trajectory in Historical Perspective

Armenia's post-independence trajectory reflects broader post-Soviet patterns in which formal statehood emerged under conditions of severe institutional, economic, and security disruption. The Declaration of Independence in 1990 established Armenia's *de jure* sovereignty and marked the collapse of Soviet political authority. Independence, however, coincided with armed conflict, economic contraction, and the erosion of centralized governance, shaping a state-building process driven primarily by short-term stabilization rather than long-term institutional consolidation (Suny 1993; Cornell 2001).

Constitution-building constituted a critical step in formalizing Armenia's new political order. The adoption of the 1995 Constitution established a republican system with codified separation of powers, fundamental rights, and institutional structures. Yet comparative scholarship on post-Soviet constitutionalism emphasizes that formal constitutional design often exceeded effective institutional implementation, particularly in contexts marked by weak checks and balances (Elgie 2011; Hale 2015). Subsequent constitutional amendments reflected recurring attempts to recalibrate executive-legislative relations without fully resolving underlying governance dynamics.

Although the separation of powers was constitutionally embedded, executive dominance emerged as a persistent feature of Armenia's political system. This pattern aligns with broader analyses of semi-presidential regimes in the post-Soviet space, where strong executives frequently constrained legislative autonomy and judicial independence and limited accountability (Fish 2005; Levitsky and Way 2010).

Electoral institutions were established early, including regular elections and a multiparty system. While these institutions formally conformed to democratic norms, empirical studies classify Armenia's political regime as hybrid for much of the post-independence period, characterized by restricted competition, elite entrenchment, and contested electoral integrity (Levitsky and Way 2010; Way 2015). Elections thus were often perceived as functioning more as instruments of regime stabilization than as mechanisms of substantive political activity.

State-building progressed unevenly under conditions of constrained resources, inherited Soviet administrative legacies, and external dependency. Institutional capacity developed selectively across policy domains, reinforcing the gap between formal independence and effective governance. In the Armenian case, scholars argue that decades of statelessness and post-imperial legacies have produced a weak state-

centred political culture, limiting the effective exercise of sovereignty even after formal independence (Atoyan et al. 2022).

Overall, Armenia's post-independence experience illustrates how legal sovereignty and institutional construction can coexist with persistent limitations on *de facto* autonomy.

From Systemic Collapse to Structural Dependence

The Soviet collapse marked the beginning of building a new system in the former republics (Shcherbina and Gorbenkova 2016, 1). During the Soviet period, these republics were embedded in a centralized, integrated economic system. Following independence, former Soviet states confronted severe economic and political crises as they were compelled to establish independent fiscal and monetary policies amid profound structural disruption. For Armenia, the task of economic restructuring was particularly urgent and complex (Abdieva, Baigonushova, and Ganiev 2017; Vasilyan 2006, 9). In this context, Armenia faced growing economic and political dependence on Russia, particularly for energy supplies, along with corresponding structural constraints (Terzyan 2017, 186). Additionally, unresolved regional conflicts and security shocks further constrained and exacerbated these vulnerabilities. This included the First and Second Nagorno-Karabakh Wars and closure of borders by Azerbaijan and Turkey, and eventual control and ethnic cleansing of the Nagorno-Karabakh region (Cheterian 2017, 82; Hedenskog 2023, 2; Mkrtchian 2025; Sahakyan 2023; Zakaryan 2021).

Together, these events and conditions entrenched a pattern of structural dependence that significantly constrained Armenia's post-Soviet sovereignty.

Data and Methods: Measuring Structural Dependence

The analysis covers the period from 1994 to 2024, and includes all post-Soviet states. Dependence on Russia is modeled through a composite index—the Structural Dependence Index. The index is constructed along three core dimensions: trade, energy, and military-security.

Constructing the Index

Trade dependence (United Nations 2024) is measured as the share of bilateral trade with Russia in each country's total external trade.

Energy dependence is measured by the share of energy imports that come from Russia, especially fossil fuels. The analysis uses trade data from UN Comtrade, focusing on HS Chapter 27, which covers mineral fuels, mineral oils, and related products.

Military-security dependence (SIPRI 2024) is measured by looking at arms imports from Russia and the presence of Russian military bases. Each part of the index is scaled from 0 to 1, with higher values indicating greater dependence.

The Structural Dependence Index is calculated by averaging the three normalized components, each weighted equally. Thus, all components are equally important.

Clustering and Transition Analysis

In addition, cluster analysis (Everitt et al. 2011) is applied to identify groups of post-Soviet states that share similar dependence profiles and trajectories. In this clustering exercise, structural dependence profiles are examined alongside regime characteristics to identify systematic associations between dependence levels and political governance. Regime type is captured using the Liberal Democracy Index from the Varieties of Democracy project (2024), which provides annual country-level data over the study period.

Finally, the study adopts a transition-based approach to examine how countries move between dependence regimes over time, drawing on a Markov framework (Kemeny and Snell 1960).

The Dynamics of Dependence on Russia in Post-Soviet States Trends in Structural Dependence

The dynamics of the Structural Dependence Index over the period 1994–2024 point to a process of polarization among post-Soviet states. Although the average SIDI level across countries remains relatively stable at approximately 0.35, the index values in the Baltic states since 2020, in Georgia since 2008, and in Ukraine after 2022 approach zero, while the maximum values exceed 0.85 (Belarus). This growing divergence indicates the emergence of fundamentally different post-Soviet models of sovereignty. These trends are not just the result of sudden political events. Instead, wars and crises accelerate changes that were already underway. In the Baltic states, there has been a sustained and deliberate effort to disengage from former Soviet ties, a process that is reflected in a gradual and consistent decline in SIDI values. This trajectory is consistent with a long-term strategy aimed at distancing these countries from legacy systems and integrating them into European economic and security institutions.

By comparison, Armenia follows a nonlinear trajectory. The SIDI value declines from 0.50 in the mid-1990s to approximately 0.23 to 0.25 by 2006 and 2007, indicating a phase of partial diversification. From 2008 onward, dependence intensifies again, with peaks above 0.60 and a maximum of 0.71 in 2022. The average SIDI value for Armenia during the observed period (0.48) is higher than the post-Soviet average. This dynamic reflects a condition of constrained and reversible sovereignty. Overall, the results show that post-Soviet independence is not a linear transition, but a complex and internally contradictory process.

Dependence and Regime Type

As a starting point for the analysis, countries are classified according to the median values of the Structural Dependence Index and the V-Dem Liberal Democracy Index. Low, medium, and high levels of SIDI correspond to values below 0.25, between 0.25 and 0.45, and above 0.45, respectively. Similarly, low, hybrid, and high levels of democracy correspond to values below 0.15, between 0.15 and 0.40, and above 0.40, respectively.

Table 1. Cluster 1: Authoritarian structural dependents (High SIDI + Low democracy)

Country	SIDI	Democracy
Belarus	0.78	0.10
Kazakhstan	0.63	0.12
Kyrgyzstan	0.53	0.19

*Source: Authors' calculations***Table 2. Cluster 2: Hybrid trapped dependents (Medium–High SIDI + Hybrid democracy)**

Country	SIDI	Democracy
Armenia	0.50	0.21
Ukraine	0.45	0.26
Tajikistan	0.40	0.06

*Source: Authors' calculations***Table 3. Cluster 3: Peripheral autocracies with low dependence (Low SIDI + Low democracy)**

Country	SIDI	Democracy
Azerbaijan	0.16	0.07
Turkmenistan	0.24	0.03
Uzbekistan	0.21	0.04

*Source: Authors' calculations***Table 4. Cluster 4: Structural defectors (Low SIDI + High democracy)**

Country	SIDI	Democracy
Estonia	0.20	0.81
Latvia	0.14	0.71
Lithuania	0.36	0.76
Georgia	0.18	0.36
Moldova	0.30	0.43

Source: Authors' calculations

Using the median values of the Structural Dependence Index and the Liberal Democracy Index as reference points, post-Soviet states cluster into four distinct groups.

The first cluster (Table 1) comprises authoritarian structural dependents, characterized by high structural dependence and low democratic development. These cases reflect a condition of post-imperial structural lock-in, in which inherited economic and security ties are reinforced through authoritarian governance arrangements.

The second group (Table 2) comprises countries with mixed political regimes and relatively high levels of structural dependence. Although these states often pursue strategies to increase autonomy, such efforts are frequently reversed, resulting in renewed reliance on external actors. This pattern underscores how attempts to dismantle inherited dependencies can remain fragile and reversible.

The third group (Table 3) includes states with low structural dependence but limited democratic development. In these cases, autonomy is largely derived from robust

domestic resources and the preservation of political and economic separateness rather than from institutional transformation.

The fourth group (Table 4) combines low levels of structural dependence with high levels of democracy, indicating a more complete departure from inherited systems and a sustained integration into alternative political and economic arrangements.

Transition Dynamics in Armenia

To analyze the dynamics of structural dependence, the Structural Dependence Index is divided into four states based on country-specific quartiles. These states represent dependency regimes: S1 (Low dependence), S2 (Lower-middle dependence), S3 (Upper-middle dependence), and S4 (High dependence). This classification makes it possible to identify not only static levels of dependence but also the dynamics of movement across these categories.

Applied to Armenia, the quartile-based classification reveals a highly nonlinear and volatile trajectory. From 1994 to 2024, Armenia occupied all four dependency states, with a pronounced concentration in the upper dependency regimes. By contrast, transitions into S3 and S4 recur frequently, indicating that periods of partial disengagement are repeatedly followed by renewed structural reliance. This pattern indicates reversible rather than sustained independence.

For Armenia, the quartile thresholds are defined as follows: S1 (Low dependence): $SIDI < 0.38$; S2 (Lower-middle dependence): $0.38 \leq SIDI < 0.50$; S3 (Upper-middle dependence): $0.50 \leq SIDI < 0.54$; and S4 (High dependence): $SIDI \geq 0.54$.

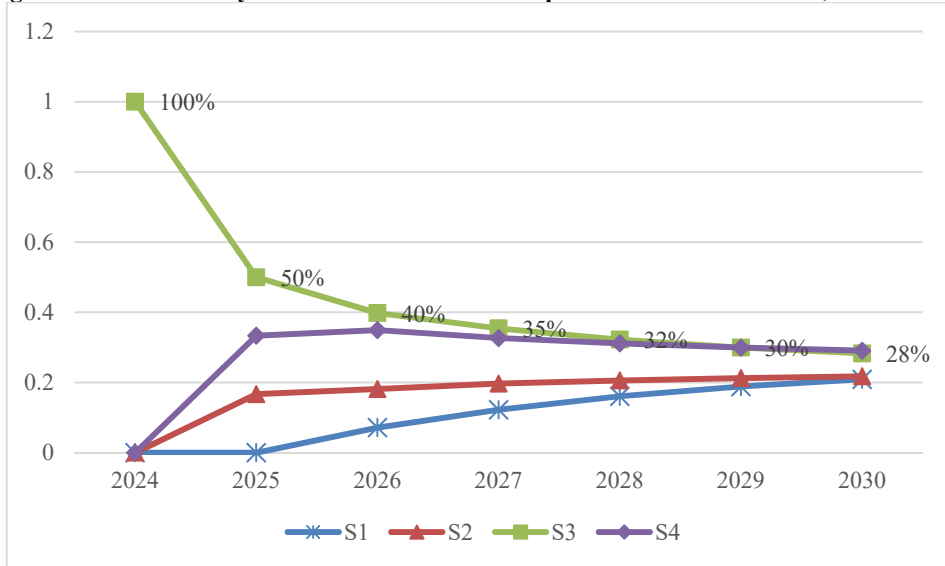
Table 5. Markov transition matrix (Armenia)

Matrix	S1	S2	S3	S4
S1	63%	38%	0%	0%
S2	43%	14%	0%	43%
S3	0%	17%	50%	33%
S4	0%	22%	44%	33%

Source: Authors' calculations

The Markov transition matrix (Table 5) shows that Armenia's dependency dynamics are unbalanced. It is unlikely for the country to move down from higher levels of dependency, while the chances of staying at the same level or moving to an even higher dependency state are much higher. In particular, the likelihood of remaining in S3 or of moving from S3 to S4 is much greater than that of moving from S3 to S2. This suggests that once Armenia reaches a high level of dependency, long-term diversification becomes difficult due to structural inertia.

Projections (Figure 1) for the period from 2025 to 2030 further reinforce this conclusion. When Armenia begins in S3 in 2024, the simulation indicates that S3 and S4 emerge as the most frequent outcomes. By 2030, there is more than a 55 percent probability that Armenia remains in upper-middle- or high-dependence states, while the likelihood of transitioning to low dependence remains below 25 percent.

Figure 1. Scenario analysis based on Markov chain probabilities for Armenia, 2025–2030

Source: Authors' calculations

These findings support the concept of post-imperial structural lock-in, whereby formally sovereign states remain embedded in inherited economic and security structures that systematically limit autonomous exit. Armenia's repeated return to higher dependency regimes illustrates how post-imperial dependence is actively reproduced rather than gradually dissolved.

The Mirage of Sovereignty: Armenia's Security Dilemma

Armenia's post-independence security predicament cannot be adequately explained through the classical security dilemma as conceptualized in realist theory. In its traditional formulation, the security dilemma arises from arms accumulation in an anarchic environment, where states' efforts to enhance their security through military buildup generate mutual suspicion and escalation (Jervis 1978). Armenia's experience diverges fundamentally from this logic. Rather than being driven by reciprocal arms competition, Armenia's security dilemma is shaped by structural vulnerability, asymmetric power relations, and limited capacity for autonomous deterrence.

Unlike states engaged in balancing behavior, Armenia has faced persistent constraints on its ability to generate security internally. Limited economic resources, demographic scale, geographic exposure, and unresolved regional conflicts have restricted its participation in sustained arms races. Consequently, Armenia's security strategy has been oriented less toward military competition and more toward alignment with an external security provider (Atoyan, Brosius, and Hovyan 2023). In this sense, security has been pursued by relying on external guarantees rather than on the dynamics of mutual military escalation typically associated with the Jervisian model (Lake 2009; Walt 1987).

This fundamentally reshapes the meaning of sovereignty. While such guarantees may reduce immediate security risks, they introduce long-term trade-offs between protection and autonomy. When security provision is effectively outsourced, defense policy, alliance commitments, and foreign policy orientation become constrained by the security patron's interests. Sovereignty thus remains intact in *de jure* terms but is selectively limited in *de facto* practice (Krasner 1999).

Dependence on a single security patron further intensifies this condition. Unlike diversified security partnerships, reliance on one dominant guarantor reduces strategic flexibility and increases vulnerability to shifts in the patron's priorities. Over time, security dependence may spill over into political, economic, and institutional spheres, reinforcing broader patterns of asymmetric interdependence and hierarchical relations (Cornell 2001; Hale 2015).

In this context, Armenia's security dilemma is best understood as non-classical: not a dilemma driven by arms competition and mutual fear, but one rooted in guarantees and dependence. The pursuit of security through external protection produces a paradox in which formal sovereignty coexists with structurally constrained autonomy—constituting a “mirage of sovereignty” rather than its full realization.

Governance under Constrained Autonomy: Institutional Foundations of Sovereignty

Beyond the security domain, Armenia's sovereignty constraints are embedded in governance patterns shaped by institutional dependence. Contemporary political economy and comparative politics literature increasingly emphasizes that the erosion of sovereignty rarely occurs through the formal dismantling of institutions. Instead, constrained autonomy emerges when formal state institutions coexist with limited effective policy discretion. In such settings, parliaments, courts, ministries, and regulatory bodies function according to constitutional design, yet their capacity to make autonomous choices is circumscribed by external dependencies and structural constraints (Krasner 1999; Lake 2009).

In post-Soviet states, institutional arrangements often serve as channels through which dependence is reproduced rather than eliminated. Armenia's experience reflects this pattern: key institutions operate within a legal framework consistent with sovereign statehood, but strategic policy choices—particularly in security, energy, and macroeconomic coordination—are shaped by commitments and constraints originating beyond the domestic political arena (Hale 2015). As a result, governance is exercised within predefined boundaries rather than through unconstrained sovereign choice.

Institutional dependence also manifests through the alignment of domestic rules with the preferences or standards of dominant external actors, resulting in a cumulative effect on autonomy. Over time, these arrangements, obligations, and commitments can limit the range of feasible policy alternatives without formally transferring authority. Comparative analyses of small and post-imperial states highlight that these mechanisms often operate subtly, embedding constraints within routine governance practices rather than overt political control (Adler-Nissen 2014; Bunce 1999).

This condition should not be interpreted as a loss of sovereignty in legal or constitutional terms. Instead, sovereignty is structurally conditioned: formally

preserved while selectively constrained in practice. States retain the symbols and institutions of independence but exercise autonomy unevenly across policy domains. Governance under constrained autonomy thus reflects a transformation in how sovereignty is practiced rather than whether it exists.

In this perspective, Armenia's governance challenges are best understood not as institutional failure but as institutional adaptation within an asymmetric environment. Sovereignty persists as a legal status, yet its effective exercise is shaped in ways that do not formally negate independence.

Conclusion and Discussion

Based on this study, Armenia's post-Soviet experience illustrates the complex nature of independence for small states embedded in post-imperial and post-Soviet institutional structures. While the 1990 Declaration of Independence granted Armenia formal, *de jure* sovereignty, the exercise of effective *de facto* sovereignty has been constrained by internal institutional weaknesses and external dependencies. Institutionally, Armenia's governance structures persist and conform to formal sovereign norms, yet their capacity to implement autonomous policy is circumscribed by external and structural constraints. This highlights the distinction between institutional presence and effective policy discretion, revealing how small states adapt to asymmetric environments rather than losing sovereignty outright. Comparative analysis underscores that Armenia is not entirely subordinate but is characterized by reversible dependence, positioning it as a representative case of fragile independence within post-Soviet systems.

Armenia's post-Soviet trajectory reveals a transitional and non-linear form of independence. The quartile-based SIDI classification and Markov transition analysis show that the country repeatedly moves between dependency levels (S3 and S4). While periods of partial disengagement and relative autonomy occasionally occur, they are often followed by renewed reliance on Russia in trade, energy, and security. This pattern indicates that Armenia's sovereignty is neither fully consolidated nor permanently lost, reflecting a structural inertia that limits sustained *de facto* autonomy. Security constraints further compound this condition. Armenia's reliance on external guarantees, rather than autonomous deterrence, reshapes sovereignty in practice, producing a mirage of sovereignty. This structural dependence reflects a form of post-Soviet lock-in that limits the scope of effective sovereignty.

Thus, Armenia exemplifies how independence for small post-Soviet states is a dynamic and conditional status, continually shaped by structural dependencies and security constraints. This gap between formal sovereignty and effective autonomy clearly illustrates that legal sovereignty does not automatically translate into full control over state affairs. The study provides a valuable lens for understanding how small states navigate the tension between formal sovereignty and practical limitations, offering broader insights into the persistence of hierarchical relationships in international politics. Additionally, this study contributes to research on the political development of post-Soviet states and emerging democracies, as well as on the nature of freedom and democracy in established countries.

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Ethics Statement

The authors affirm that this research was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The authors declare no conflict of interest.

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BEYOND THE CHECKLIST: ADVANCING DISARMAMENT, DEMOBILIZATION, AND REINTEGRATION PROGRAMS FOR A NEW GENERATION THROUGH THE LENS OF THE GENDERED REINTEGRATION EXPERIENCES OF FORMER PKK GUERRILLAS

KARDO RACHED* 
University of Human Development

AHANG HABIB HAWRAMI** 
Sbey Research Center

BUNYAD O. MOHAMMED*** 
University of Halabja

Abstract

This study examines the reintegration trajectories of former Kurdistan Workers' Party (PKK) fighters in the absence of a formal disarmament, demobilization, and reintegration (DDR) system, exploring how gender and political discourse shape post-conflict reintegration. It critically examines the traditional United Nations DDR model in the context of PKK's non-mission setting and reframes reintegration as a socially and politically situated process rather than a primarily technical one. The mixed-methods design draws on 20 semi-structured interviews with 12 former PKK fighters (six women and six men) and eight community leaders, alongside a large dataset of Turkish-language content published on X (formerly Twitter) between 2010 and 2025, analyzed for topic and sentiment using OpenAI's GPT-4o mini-model. The results show that disarmament occurred voluntarily and gradually without institutional recognition, while demobilization never developed as a systematic or state-sponsored process; former combatants instead relied on family support, informal labor markets, diaspora networks, and political connections to facilitate socioeconomic reintegration, though many reported significant declines in physical and psychological well-being. Drawing on feminist security

* **Kardo Rached** is a PhD candidate of the College of Law and Political Science at the University of Human Development, and a Lecturer at the Human Development University in Sulaymaniyah, and Manager of the Turkish Studies Unit at the Sbey Research Center. Email: kardo.rached@uhd.edu.iq ORCID: <https://orcid.org/0000-0001-8015-8163>.

** **Ahang Habib Hawrami** is an MA researcher in the Turkish Studies and Climate Units at the Sbey Research Center, and a master's student in the the Department of Western Languages and Literatures at Karabük University. Email: ahang.husein@gmail.com ORCID: <https://orcid.org/0009-0004-2854-6854>

*** **Bnyad O. Mohammed** is a lecturer of the Department of Electrical Engineering and Electronics at the University of Halabja. Email: bnyad.mohammed@uoh.edu.iq ORCID: <https://orcid.org/0009-0007-5847-1998>



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theory, the study demonstrates that reintegration is deeply gendered, with female former combatants facing particular challenges and forms of exclusion. By integrating the personal experiences of former PKK fighters with broader societal and elite discourse, the study advances a new-generation understanding of reintegration and disarmament, arguing that it should be seen as a socially and politically negotiated process shaped by local context, gender relations, and public perceptions rather than a standardized technical intervention.

Keywords: *feminist security theory-based, Türkiye, Kurdish Question, Turkish Community, gender analysis, disarmament, demobilization, reintegration.*

Introduction

Disarmament, Demobilization and Reintegration (DDR) has been employed for more than three decades as a central mandate verified and supported by United Nations, to manage post conflict transitions in different contexts with the hope of reducing the risk of renewed violence and extremism. There are many samples of the experience starting from Namibia 1989 when UN for the first time involved in the process through its observers. And this led to the voluntary demobilization of irregular armed forces in El Salvador (Reufer 2005). Nevertheless, most of the frameworks of DDR have been designed and implemented in mission settings, after peace agreements signed in post conflict areas, leaving a significant policy gap, applying it to armed groups or non-state actors in non-mission settings. Kurdistan Workers Party most commonly known as (PKK) or in Kurdish language (Partiya Karkerên Kurdistanê) with 41 years of large scale and sustained armed struggle, and three thousand to seven thousand active guerrillas, thousands if not millions of supporters, drawn from multiple countries including; Iraq, Iran, Syria and Türkiye, represents a complex case to DDR in non-mission settings (Bruno 2007; Mumford 2021). PKK as Kurdish militant political organization with Marxist-Leninist ideology founded by Abdullah Öcalan in 1978, its structure, ideological evulsion, the context it is active in and it's regional ties can challenge the conventional assumptions of DDR (Bruno 2007). This study seeks to interrogate conventional Disarmament, Demobilization and Reintegration framework adopted by United Nations in non-mission context of PKK. Combining the quantitative social media analysis and qualitative interviews, the study examines unfold of reintegration in the absence of formal DDR framework, and the way both gender and political discourses shape the post-conflict outcomes in PKK setting. Moreover, United Nations Integrated DDR standards employed in the study as comparative benchmark, with the development and advancement of Next Generation of DDR, which re-conceptualized reintegration as politically and socially embedded process in society, rather than a technical process.

The study holds great position for both theoretical and empirical factors. The main reason is the eventual disengagement of guerrillas, which is already accruing. There are different forms of it including, group-based disengagement as it happened after 2000, which more than one hundred guerrillas disarmed, and individual defection which happens occasionally. What is more salient in this context is, former guerrillas, who decide to disarm and return to civil life. They return to an environment which lacks

DDR and it is highly polarized and securitized. They face sever challenges, including social stigmatization, legal invisibility and economic instability. These obstacles appear everywhere the guerrillas disarm, but they are acute in non-mission settings such as IKR. This happens because of the geographical location of the region which located in North of Iraq, sharing borders with Iran, Syria and Turkey and national tie, which is land of Kurdish nation, with majority of the people speaking Kurdish and a Kurdish system and legal framework. Moreover, majority of the guerrillas disarm and intend to stay there. At the societal level, sometimes unfavorable public discourse challenges them in IKR. Furthermore, lack of legal statue and documentation and poor access to sustainable live hoods are out there. In addition, adverse and hostile public narratives further challenge their retunes, especially in Türkiye. For instance, analysis of 5,225 Xs (formerly known as Tweets) published in X (former Twitter) social media platform between 2010 to 2025, reveals that Turkish public portrait PKK guerrillas as terrorists, threatening Türkiye's national security. The language used in the Xs is characterized by aggressive language patterns, social dissatisfaction, and calls for punishment of the guerrillas. Finally, such a discursive society, challenges the successful reintegration process and increase the chance of remobilization over time.

The core claim of this study and the argument advanced in the study is that, the absence of context specific DDR framework, tailored for PKK guerrillas in mission or non-mission settings constitutes a critical security gap in the settings the party exists in, in one side. In the other side, when guerrillas disarm individually or in group face severe challenges including, psychological distress, long-term economic vulnerabilities, long time social exclusion, mainly in the first four years of their disengagement of the party. It worth mentioning that, the pressures more pronounced among former female guerrillas, those prolonged exposure to the war and fighting in battlefield, creates lasting social and psychological affects, that challenge the reintegration models. This shows that, without DDR framework tailored for PKK, context specific DDR tools, and gender sensitive DDR programs with the use of the principles of Next generation of DDR, the risk of reactivation, local insecurity, and social marginalization increases. These conditions challenges security in local, national and regional level of Türkiye and IKR (Tziarras and Gul 2026).

Employing a mixed method research design; the study combines quantitative and qualitative approaches, with the objective of designing a gender responsive PKK specific DDR framework in non-mission settings with the use of principles of Next generation of DDR. The empirical data includes 20 in depth interviews (IDIs) with formers senior guerrillas of PKK (six male and six females with minimum ten years of rolling as active combatants from Kurdistan region of Iraq (IKR) and Türkiye. And eight community leaders with extensive professional background and knowledge of PKK, including law and military experts, academicians, journalists, social leaders, political activists of both genders (male and female). And analyzing of 5,255 Xs published in variant occasions from 2010 to 2025 by different accounts including normal people, political and governmental leaders of Türkiye and 10 accounts of 10 most popular media outlets of the Türkiye in Turkish language on PKK in X social media. The findings of the study demonstrate a pressing need of PKK tailored gender sensitive DDR approach with ability of going beyond the traditional non mission

setting DDR frameworks. But with ability of creating an environment which makes legal reintegration, social preparedness, physical support, economic stabilization, psychological habitation, and political & system preparedness possible.

The study proceeds a literature review of the existing literature on DDR, implemented samples, PKK's background, ideology, and evolution, the local and regional context PKK acting in, it also highlights the key empirical and theoretical gaps. It will be followed by theoretical framework guiding the analysis of the study, and detail tailored discussion of the methodology and design. The following section uncovers the analysis and findings of both qualitative and quantitative data with particular attention to gender.

The Evolution of DDR from unsystematic practice to context tailored strategic framework

“Disarmament, demobilization and reintegration are at the heart of successful peacebuilding” stated former secretary general of United Nations Kofi Annan, addressed UN Security Council on Mar 23, 2000 in open debate with 31 member states on maintenance of peace and security in the world and post-conflict peace building process. The remark Annan made was at a time when conflicts in the world were internal and the Council had been working on reviewing the lessons learned from the operations in Kosovo, Democratic Republic of Congo, East Timor and Sierra Leone. (United Nations 2000a). 25 years later, following multiple conceptual revisions (2009/2014, 2017, and 2019) DDR continue to function in process of stabilizing post-conflict areas (United Nations 2000b). Yet, conflict landscapes all around the world, marked by existence of armed groups and non-state actors created unsolved conflicts in different regions. This challenged DDR as a mission-centric framework, and has generated time bound need of rethinking DDR, beyond the traditional settings. Kurdistan workers party presents a paradigmatic case study, to investigate the framework, limitations and possibilities of implementing DDR on. To be able to situate this inquiry within a rational framework, this section explains the conceptual foundation of DDR and its evolution, with particular attention to gender sensitive DDR in non-mission settings, and their emergence. Moreover, it examines how this type of DDR can intersect with regional context, organizational structure and ideological evolution of PKK.

Disarmament, Demobilization and Reintegration (DDR) is one of the crucial frameworks in peace process initiatives, with ability to make impact on post-conflict stability. Although seemingly born yesterday, but it holds historical roots (Rodríguez-Castellón 2024; Mazurana, McKay, Carlson and Kasper 2002). The analysis of the historical roots shows that recognition of DDR started from ancient Room, when they used the crude forms of DDR for the veterans. For instance, they distributed farm-lands and recruited them to army to support them in reintegration process. There is evidence of implementation of DDR programs in the beginning of 20th century after the end of Boer war between Republic of Boer and British Empire in 1902 (Lamb 2008).

The World Wars made great change in the vision of the experts of reintegration process, because noticeable number of solders demobilized after both World Wars,

great numbers of the found reintegration process challenging and re-activated in to armed groups. Germany is one of the noticeable examples, when first World War resulted in deployment of large number of solders, the government failed in collecting the guns and support of them in reintegration. Short time after war, the guns used in partisan struggles and the solders joined armed groups and re-activated. Furthermore, those who did not join armed groups, they failed to integrate and emerge in the democratic structure the country planed. This experience of failure was an incentive to US and pushed to further improve the practices of demobilization and reintegration, especially after World War II. So, the country started demobilization in stages, the solders offered pre-exams to re-join school or high education. The main objective at that time was to avid influx solders into labor market and civil communities, with hope of reduction of violence. In contrast of what happened in Germany after World War I, the demobilization experience of US veterans witnessed less setbacks and challenges (Banholzer 2014).

Establishment of UN in October 24, 1945 after international instabilities of World War II, marked a new phase of conflict resolutions and peace building in the world. It took UN and states almost half century (45) years to emerge Disarmament, Demobilization and Reintegration in late 1980s to Early 1990s. The size and the scope of the framework developed with the growth the international peace building efforts witnessed. For instance in UN observer group 1989 conducted voluntary disarmant and demobilization of Nicaragua Resistance, through the Toncontin Agreement. The same year 13, 000 combats from Peoples liberation Army of Namibia were disarmed and demobilized. And 30,000 combatants from the forces of South Africa disarmed and demobilized. Following what happened in Nicaragua and Namibia, UN Transitional Authority Program in Cambodia implemented in 1992. Lessons learned from the Disbarment and demobilization process revealed that, both DDs can not guarantee the permanent de-activation of combats, they have to be given new opportunities to start over again, with the purpose of lessen their interest to re-activate in long-term. In the early stages of realization of this fact, UNs was first international body to adapt the strategy, and start Reintegration to Disarmament and Demobilization framework. They did this while supported resettlement of combatant in Democratic Republic of Congo. 2000 onwards was new phase in the practice of DDR , because 2000 onwards because instead of single country, multi country operations of DDR started. For instance for the first time in 2002 Multi Country Demobilization and Reintegration Program embraced seven countries in the Interlacustrine Region of Africa (Great Lakes Region). The Program led by World Bank, Multi Doner Trust Fund and IDA funds with \$500 millions. (Banholzer 2014; World Bank 2010).

This type of peace intervention is now expanding its scope. According to DDR Compendium of the projects of IOM (2010-2017) in the past 25 years the organization has supported more than 120 projects in 30 different countries with particular focus to Sub-Saharan Africa and Colombia. The projects assisted the combatant and the communities the combatant returned to, recover from conflict primarily through the reintegration activities and long-term strategies that guarantee the de-activation of the combatants and social peace in society (IOM 2018; Dash and Haseen 2026). Equally important, DDR in non-mission settings within the countries were no official UN peace

keeping operations exist missioned, case of Afghanistan, Democratic Republic of Congo Indonesia, Central African Republic, Uganda, Niger and Somalia are existing samples (Banholzer 2014).

The grammar of peace building: what is DDR?

DDR generally regarded as a tool managing post conflict transitions. With objective of supporting combatants disarm - demobilize and revert to civil life. And keep post conflict societies social and security peace safe, as stabilization mechanism. It also worth highlighting that, with all the measures and detailed definitions given of the framework by DDR experts mandated by UN agencies, there is still ambiguity in the implementation of DDR, for instance some DDR programs and tools launched and implemented while hostilities were still in place. While other programs and tools of DDR launched after the sign of peace agreements . Some others launched and implemented after termination of war without resolution of a peace initiative or a peace agreement, as it happened in Central African Republic. There are also samples of DDR launched after the termination of a peace agreement. And It is not obvious that, noticeable number of peace agreements signed does not contain references to DDR. According to the Peace Agreement Database of Upsala Conflict Data Program (1989 - 2005) out of 148 programs only 63 (43%) peace agreements referenced DDR , and the rest which makes 85 peace agreements did not mention and contain DDR as program. This is not always the case, because out of 40 DDR implemented, 14 of them operated without any international peace measures and missions. (Uppsala Conflict Data Program 2006). In addition, all frameworks designed does not contain all three components. Some, countries only adapt exclusively the first two DDs, some others skip the DDs and focus on reintegration process of the combatants. For instance, Rwanda and Indonesia gave focus to reintegration (Banholzer 2014).

Given the diversity of the perspectives of DDR and complexities of the implementations and contexts the framework will be operated in, it is time to discuss what it fundamentally is? What are the forms it takes? The contexts it rule under? And under which condition it will succeed? And highlight the challenges that constrain its effectiveness. Different scholars define DRR from different perspectives, but most verified definitions come from United Nations Inter-Agency Working Group on Disarmament, Demobilization and Reintegration. According to operational guide to the integrated disarmament, demobilization and reintegration standards (2010) Disarmament is process of collecting, documenting, control of the guns, ammunition, heavy weapons of the armed groups, take out the guns in the hands of the combatants, some times in the hands of civilians and small communities. It may include, initial programs of arms management programs and tools.

Demobilization is the formal process of discharging combatants—who served in armed groups or armed forces—from service. The initial stage of this process encompasses everything from the registration and preliminary processing of combatants at temporary centers to their large-scale assembly in designated areas or camps. The second—and final—stage of demobilization involves providing a package of support measures to the demobilized combatants.

This support package is known as ‘reinsertion’ (initial resettlement). It is a form of transitional assistance provided to demobilized combatants prior to the start of the reintegration process. It ensures that the basic needs of the combatants themselves and their family members (where applicable) are met—including the provision of clothing, food, shelter, and medical care—while also facilitating preparation for the transition to civilian life, short-term training, legal support, and assistance in accessing the labor market (e.g., regarding employment). Although the terms “reinsertion” and “reintegration” are sometimes confused, there is a distinction between them: while reinsertion consists of short-term financial and material aid, reintegration is a long-term process involving the economic, social, and political development of demobilized combatants, as well as the preparation of society and state institutions to accept them in order to ensure sustainable outcomes. This process has no fixed timeframe and unfolds within society and the state system; it forms part of the national action plan and the process of ensuring social and political stabilization, while also fostering further development (United Nations Inter-Agency Working Group on Disarmament, Demobilization and Reintegration 2010).

The traditional definitions of the components of DDR by UN and its history can give simple image of it, but to further understand it, it is important to discuss the evolve of DDR with the development of global ideas of peace and security. Early 2000s mark new phase of UN peace keeping missions, because they have been given border responsibilities. This further expanded DDR framework, but this expansion, did not went without critiques, because many experts were seeing this expansion as a factor of limiting DDR, especially regarding the time frame, many felt that the objectives of DDR are unreachable and the goals are unrealistic. With all the critiques made and continuation of DDRs all around the globe, in 2010 UN recognized a new style of DDR, called “Second Generation”. It was build on the old principles of DDR, yet influenced by security reform in the sates and peacebuilding in the societies. It simply shifted DDR from a frame work with objective of “ending war” to “peace building”. The argument behind this is in DDR the focus is mainly to breaking up the armed force or group and support them in the reintegration process, and the combatants were seeing as “spoilers who might re-activated in any time, while in Second Generation of DDR focus is given to rebuilding the community, creating sustainable economy and economic opportunities, improving the social relationships and social peace. This approach mainly supported by UN peacekeeping department and UNDP.

The Second generation of DDR become common after the conflicts happened in Balkans, Southeaste Asia and West & Central Africa. The conflicts in the regions were internal rather than between two or more states. It was difficult to make differentiate between civilians, combatants and rebels, even after the end of the war. In many cases the ceasefires and peace agreements were not able to stop the ongoing vionlance. The reason behind this was, the armed groups had international and regional ties, especially those who were involved in illegal trade such as weapons, minerals, human trafficking, and drugs. For instance, in 2004 rebel uprisings happened in Haiti, leading a political chaos in the country, economical and humanitarian crises. The necessity of the change and Second Generation of DDR appeared because the armed groups were urban gangs who have relation with political elites of country and organized crime groups. This

pushed UN missions in Haiti to create a new approach, titled, 'Community Violence Reduction' approach. It focus on crime prevention in communities rather than old school military demobilization. The results came out from the implementation of the approach pushed UNs re-think of the implementation of DDR in the modern conflicts all around the world (Muggah and O'Donnell 2015).

In the last 10 years, once more DDR witnessed changes, because peace and security experts realized the raise in activities and types of non-state actors in different regions, and difference between the conflicts newly emerged non-state actors create with the old ones, finally the need of practical guidelines align with the modern conflicts, as result DDR framework, DDR programs and DDR tools became more flexible. However, IDDRS remained the same. For instance between 2000 and 2010, 20,000 active combatants and members of Democratic Forces for the Liberation of Rwanda (FDLR) returned to their own country. Meanwhile around 2,000 combatants refused to disarm and remain active and continue committing violence activities. In 2012, UN supported a forceful military approach to pressure them in the context of "Robust Peacekeeping". Then they remain with no choice only to join DDR. This revealed a fact that some non-state actors require "stick then carrot" strategy. Somalia is another sample of the necessity of change in DDR and sometimes use "stick then carrot" strategy. After long battle African Union Forces could retake Mogadishu from Al-Shabaab in 2011. After the failure of Al-Shabaab and lose of the territory, ordinary combatants of the group asked for help to leave the group. As a solution to the problem Somali government with support of UN agencies created "disengage" programs for the Al-Shabaab members and combatants. In the framework of the program they created transition centers with heavy involvement of the Somali intelligence, existing life threats on the demobilized ones and continuation of the war with Al-Shabaab. The nature of the conflict and the DDR/If DDR was different from former ones because the demobilized ones were in need of protection, secure location and time to start negotiation with their clans to accept the. It was less about economic opportunities and development, but rather it was about motivating them to abandon violence and make their communities accept them.

After the NATO's intervention in Libya, after the start of Arab Spring, the state collapsed. As result of lack of a central authority, there was no control over the weapons in the country, with all the mess on ground, successful DDR was impossible. Instead, UN started a Damage Control strategy. They supported militias store their weapons safely. The lesson learned from what happened in Libya was without basic political agreement and security agreements DDR cannot work. Other samples that show the implementation of DDR in different context and hopeful scenario is Mali in 2015. DDR included in the very beginning of peace negotiations, and the DDR experts were part of the peace mediations. Moreover they, supported the armed groups (National Movement for the Liberation of Azawad & High Council for the Unity of Azawad) allowing them to remain armed under the UN monitored ceasefire. Meanwhile, the Community Violence Reduction approach implemented in the cantonment regions, to minimize the both personal and organized violence.

The samples mentioned support the fact that, the new generation of DDR is in need of development and flexibility, because of the dissimilarities of the contexts DDR is

implemented in and difference in the type of the non-state actor and the conflict they create. Here is the importance of Next Generation of DDR appears, because it initially starts earlier and sometimes before the peace agreement or it will be implemented alongside the continuation of military operations. It is not always voluntary, and operates in unstable contexts. Moreover, it shifts DDR from a technical checklist to a political negotiation peace process. And its teams are part of the peace negotiations. It will be part of the peace talks, security, social and political reform, justice, finally state building. In addition it tries not to label members of the armed groups as Ex-Combatants or fighters, rather encourages them to have new identity as local leader, worker, parents or community member. It also worth mentioning, that even the Next Generation of DDR could be challenged, because today's armed groups are criminalized, lacking clear political goals, some linked to terrorism and fragmented. This makes the implementation of DDR far more complex than former post-war settings (Muggah and O'Donnell 2015).

Post-Conflict illusions in the Middle East: practice of DDR in the absence of settlement

Historically, Middle East presents complex case of DDR experiences, its challenging political, ethnic and military landscape constrains the effectiveness of DDR framework. Unlike ordinary settings where DDR follows peace agreements and more quite landscape Middle East's conflicts and political tensions often have ability to highlight the limitation of DDRs because the conflicts of the region are characterized by ongoing violence, non-state armed groups, states ruling inside states, political legitimization of armed groups, religion and ethnic conflicts, and strong network of the armed groups with regional characters. (Sawani 2017). Most of the peace and security scholars argue that DDR frameworks are insufficient in the context of Middle East, because they must be adapted to lack of clear post conflict transitions strategy, state capacity and security agreements. It is also worth mentioning that DDR in the Middle East viewed as political intervention integrated to security reforms by the state, good governance and restructure of the government bodies, and long-terms strategies of social and political peacebuilding. (Wehrey 2018).

While Middle East has never experienced fully DDR framework succeeded, two attempts of the implementation of DDR stand out, Yemen and Iraq. Both samples never gained traction. The situation in Yemen consistently sparks controversy and lively debate; notably, Jachnik (2020) examined the failure of attempts to implement a disarmament, demobilization, and reintegration (DDR) program in the country. He identifies two categories of armed actors in the country, which includes; Houthis (أنصار الله الحوثيون), local rebel military group who controls most of the areas of Northern Yemen. The internationally recognized government of the country's army and the militias allied with it with organized in forms of tribal defense, they are empowered by Saudi Arabia collation, and they most popular among Yemen's youth. Because of the armed conflicts and armed activities of this groups almost 24 million civilians are in need of humanitarian aid. Moreover, because of their activities Yemen globally ranked Third in prevalence of Armed Groups, because 54 guns are per 100 people in the country. The conflict context of the country never allowed classical DDR, however

UN's DDR section office worked in the country as part of the Special Envoy of UN Secretary General to Yemen. Their roles was always around mediation and advisory. Moreover, UN DDR Bulletin reveals that, in UN mission to support Hudaydah agreement in 2016 and 2017 included DDR components, within a political mission framework. But all the attempts made in the country never succeeded. (United Nations Disarmament, Demobilization and Reintegration [UN DDR] 2025). It is same for Iraq, because attempts of DDR could not succeed in the country. The DDR of Popular Mobilization Forces (PMF) most commonly known as (الحشد الشعبي) or (al-Hashd al-Shaabi) and Kurdish Peshmarga forces is noticeable sample of this failure after defeat of ISIS in 2017, and DDR of Kurdish Peshmarga's after 1991 uprising in Kurdistan region of Iraq are noticeable samples.

July 9, 2017, Iraqi Primminister Haider al-Abadi has formally announced the victory of his country over so-called Islamic State of Iraq and Syria (ISIS). He waved Iraq flag among his troops saying; this is collapse of the state of terror" (BBC News 2017). After almost four year of fighting, thousands of combats including combatants of PMF and Kurdish Peshmargas started to return to their local communities. Starting from PMF, when ISIS launched its armed activities in the end of the spring of 2014, Iraq armed forces could not defeat this new enemy, they left many towns and communities living in the towns undefended. To address this security gap, on Jun 13, 2014 Grand-Ayatollah Al-Sistani, Iraq's most influential Shia clerk issued a fatwa. He called upon all able-bodied Iraqi males to take up arms against ISIS. After this fatwa, hundreds of thousands responded. The point was, they did not join Iraq's formal security forces, instead the gathered in group, they turned to non-state actors. Initially, many of the volunteers re-activated and joined militia groups existed, many of which associated with political figures, political parties or maybe regional actors. Only small group of them remain with no political ties, and their duty was to protect Shia sites. In Nov 26, 2016 the law to formalized PMF as part of Iraq's security forces passed in Iraq's council of representatives (Parliament), later on approved by Iraq's former president Fuad Masum. Between Grand-Ayatollah Al-Sistani in 2014 and defeat of ISIS in 2016, PMF forces grew from 1 to 707 different groups with Shia majority, and very small number of Sunni groups. In Mar 2018, Haidar al-Abadi issued a decree to incorporated PMF as Iraq's defense system and security forces. The decree granted the combatant salary and other financial benefits. Those who are in the age of 18 and 25, who must graduate from collage of staff of defense ministry or command collage to hold rank of lieutenant or above. The first step of DDR of PMF started from 2018, when National Reconciliation Committee claimed, after ISIS war 43,000 fighters of PMF would like to demobilize, but it does not seem right. On the number of PMF fighters, according to prime minister Abdi's office information released in 2018, the number of PMF fighters was 152,000 with 120,000 receiving salaries from Iraq government, and 32,000 receiving salaries from other sources. However, Iraq government same year started to allocated another 30,000 fighters of PMF. According to a budgetary expert by 2019, another 30 to 36,00 fighters added to PMF with their allocations. This created a strong network out of PMF, and steps toward DDR of the force again remain critical to the time of this research.

This is almost the same for Kurdish Peshmargas, they are part of the formal defense system of Kurdistan region of Iraq. Their number was estimated to 190 to 250,000 Peshmargas in 2015, while in 2019 their number estimated as 300,000 Peshmargas. In addition to this, there were people who were voluntarily joined Peshmarga force to fight against ISIS. However, Peshmarga is legally defense system of Kurdistan region of Iraq, and internationally verified, but they are divided into factions on the basis of their political agenda. One faction related to Patriotic union of Kurdistan and the other faction have ties with Kurdistan Democratic Party. Back to 1994, the two forces fought each other in civil war. In 2006 after four years of the 2003 invasion the efforts to unify Peshmarga forces started, the first effort ended up in unification agreement to demobilize them, in 2009 after three years of the agreement the two Peshmarga ministries one of KDP and the other one of PUK, were organized in one ministry under Kurdistan regional government, named Ministry of Peshmarga affairs. The ministry as first step created 14 integrated brigades of 40,000 combats. Yet, almost 100,000 Peshmargas were out of the authority of the ministry. They were known as (70 Force tied to PUK) and (80 force ties with KDP). Each one of these forces retain its salary and armed structure, with headquarter where the party most ruling. In addition, both parties have their own, security force, counter-terrorism forces and intelligence. The reform in these forces went critically, and the fall of ISIS further challenged the reforms in Ministry of Peshmarga. For instance, in the very beginning of 2017, Ministry of Peshmarga (KRG) adopted a 31 point package. The package includes commitments to unify 70s and 80s forces. The Oct 16, 2017 incidents after Kurdistan Region Referendum, which resulted in reduction of 40% of Kurdish controlled territory, loss of Kirkuk's oil fields which were under Peshmarga's and Bagdad's order to retake control of Iraq's disputed territories, further challenged the reforms, because the incidents not only generated further tension between Erbil and Bagdad, but cause ignited internal tension between PUK and KDP. Both parties accuse each other of betrayal and working with enemies of IKR Kurds. This tensions now and then push calls for re-division of IKR to PUK and KDP territories as it was before 2006. This made DDR of Peshmarga forces further challenging, and till now never succeeded (Parry and Burlinghaus 2019; Al-Khafaji 2019).

Despite the limitations of DDR frameworks and failure of the attempts mentioned in Middle East, the prospective DDR of PKK remains a complex and critical case. With more than four decades of armed struggle with Türkiye, being active in Iraq, Iran, Syria and Türkiye, having a dynamic character and structure, PKK remains a critical case for DDR, especially with the necessity of design of gender-sensitive DDR framework in non-state mission-setting. This research is an attempt to address this analytical gap, in Middle East, a region whose security and political trajectories have historical root and shaped, will continue to shape in the future (Mojtahedi, Bolhuis and van Wijk 2025).

Beyond mission based DDR: addressing reintegration in context of PKK

The DDR framework was international designed as a mechanism with ability to enable transition from war to peace or from post-conflict situation to sustainable peace when non-state armed actors exist, under the mandate of UN peace missions. However, the

experience of Kurdistan Workers' Party (PKK) guerrillas and the guerrilla warfare demonstrates the fact that in Middle East and all around the world many non-state armed groups operate in different contexts, where mission based DDR programs and tools are absent. The nature of the armed groups like PKK and the context they operate in will challenge the traditional DDR standards, because capture of the reality of armed groups and complex contexts like one PKK is operating in, not easy task to do. In this study PKK is treated as non-state armed group, mobilized in November 26 – 27, 1978, announced its existing in July 1979 in Türkiye. (Jongerden 2023). The groups ideology is treated as, Marxists – Leninist national liberation movement with goals of building independent Kurdistan with a classless society till 2000s. Then change in ideology of the party to build ecological democratic confederalist society with the aim of securing Kurdish peoples constitutional and civil rights, creation of democratic autonomy in the country, Pushing Türkiye to non-centralized system. (Yarkin 2015). To analyze the context the study uses Integrated Disarmament, Demobilization and Reintegration with focus to Next Generation DDR framework outlined between years 2017 and 2023. Moreover, to understand the female guerrillas in PKK context, the study draws feminist security theory. Which explains how gender is capable of shaping security experiences, create threats and opportunities in both conflict and post conflict contexts.

The study adapts IDDRs with focus on Next generation of DDR, and it shifts the focus from DDR in post-conflict contexts to conflict contexts and fragmented conflict contexts like the context PKK is operating in, which surrounded by regional war, legal, political, religious and ethnical conflict and internal armed struggle in Iraq, Türkiye, Syria and Iran, with its headquarters in Kurdistan region of Iraq. It emphasizes on sustainability, inclusivity and political and social structures the framework processing in. While demobilization and reintegration programs has been absent in the context of PKK since the very beginning, the framework is able to provide standards of evaluation, how informal reintegration deviate or reflect IDDRs and Next Generation of DDR. Meanwhile it allows the study to examine how principles of the framework could support reintegration of combatants even in conflict setting/non-mission settings. Moreover, by using them as normative standards, the analysis of the study shows micro gaps between lived reality of the Ex- guerrillas of PKK and their reintegration process without a formal program and DDRs theoretical side, how IDDRS might be adapted in conflict context, where traditional involvement is absent.

To understand the experience of former female PKK guerrillas, and their reintegration process as female combatant, the study draws feminist security theory, it interrogates how gender roles in shaping the experiences of PKK female guerrillas in conflict contexts. Here the theory treated as an approach, which treats gender as lens to analyze, understand and address security challenges, rather than considering it as sub-topic in security studies. It argues, security topic and security challenges cannot be studied without consideration of gender lens, women's affect, and ways which gender shapes and reshapes experience in conflict and post conflict contexts. And the ways, how gender shapes and re-shapes relations, human rights, economy, militarization, political situations and political economy. (Sjoberg 2016). Through the lens of the theory, and treating gender as analytical variable, the study explores, how being a female ex-guerrilla shapes demobilization and reintegration experience and influences

access to economic and social opportunities. Meanwhile the study, compares experiences of six female Ex-guerrillas of PKK with six male Ex-guerrillas of the same group, it also examines gender differences in terms of the challenges and supports, social adaptation, societal acceptance outside formal reintegration program.

Practice of DDR in non-mission settings is essentially political, because most of the time it is state leading. The social and political embedding of reintegration of PKK guerrillas, which operates in ongoing conflict setting, social perceptions and contested legitimacy, especially labeling them as “terrorist” Turkish social media (X; former Twitter) and main stream media, shapes the challenges and opportunities while reintegration in civil society. Collecting 5,000 Xs on (X; former Twitter) published by main stream media, by ordinary people, political and governmental leaders of Türkiye, and 8 in-depth interviews (IDIs) with communities’ leaders with background of PKK provides insight to local social and political conditions going on in Türkiye on ground. On the basis of this perspective DDR can be reconceptualized as socially and politically embedded framework, not distinct intervention specialized for post conflict contexts. This also demonstrates that, reintegration of Ex-combatants is a process, shaped by community dynamics, social context, and informal initiatives of the states. Here the role of gender appears, because it allows the analysis show how gender dynamics can interact with social contexts, political situations, legal framework and ongoing conflict, then shape the opportunities and challenges of Ex-combatants while reintegration.

A mixed method analysis of reintegration of PKK ex-combatants

The study adapts mixed method research design (qualitative and quantitative) to examine the non-mission setting DDR of guerrillas of Kurdistan workers party (PKK). The reason behind adapting this method is, the method fits the analysis of DDR framework in conflict settings like PKK, where lack programmatic data, and unfolding of the reintegration process depends on collection of fragmented data, driven from legally, systematically and politically constrained. Combination of both qualitative and quantitative data is only way to cover both individual level integration of former PKK guerrillas and socio-political context the reintegration occur. Moreover, the research theoretically uses Next generation of DDR, which conceptualizes the framework as process extending beyond post-conflict context, rather it is context-sensitive and adaptive. It also employs IDDR standards as normative benchmark. It also adapts feminist security theory, which conceptualizes gender as a variable, with ability of shaping and reshaping reintegration experience.

The qualitative data is 20 semi-structured interviews/ in-depth interviews conducted with two types of participants. The first type includes 12 former PKK guerrillas (6 male and 6 female), to be able to do gender comparative analysis. The youngest age among the interviewed former guerrillas is 39 years (born in 1985) and the oldest age is 63 years old (born in 1962), with active year of been guerrillas ranged from less than a year and more than 23 years. And with earliest mobilizing year ranked 1995 and oldest mobilizing year as 1977. Second group includes 8 community leaders with strong knowledge of PKK, and social and political context the group is operating in and the individuals reintegrated in. They are four types of community leaders,

including; journalists, academicians, military and law experts, and social leaders. The participants of both groups selected by purposive sampling. For instance, targeting former guerrillas reintegrated in Kurdistan region of Iraq and EU countries. The main them of the interviews was; social and political background of the combat, their experience in the armed group, disarmament and demobilization process, reintegration experience, their identity change and gender constrains. Giving the sensitivity of the topic and the context the former-guerillas and community leaders are living in, the interviews conducted under strong ethical consideration, which includes protection of the identity of the participants, and their consent of the usage of the data.

The study also incorporates quantitative data, which includes analysis of Turkish language Xs (formerly known as Tweets) published in X (formerly known as Tweeter) social media, from 2010 to 2025. The research uses two sample research design, seeks to examine elite preference (political leaders and media) and public. The research also uses automatic harvesting from 5,50 tweets, published by general users and manually selected 206 tweets, published on verified accounts of political leaders, media outlets of the country and accounts of the political parties of the contra on X. The vore analytical engine was OpenAI'S GPT – 40 mini model, it performed nuanced sentiment and thematic classification. The component of analytical methodology was the application of bespoke Influence Score Algorithm. It is weighted metric designed to prioritize impactful voices within the dataset. The algorithm calculated a score (S) for each post using the formula $S = 0.6 * (F / F_{max}) + 0.4 * (L / L_{max})$. In the formula F presents the users follow the account, L presents the posts likes count, each normalized against the maximum values in the dataset (F_{max} , L_{max}). By assigning a 60% weight to the user's inherent reach (followers) and a 40% weight to the content's received engagement (likes), this formula ensured that the final analysis were not a mere tally of opinions but a representation of the conversation as amplified by its most authoritative and resonant voices.

Together, the theoretical framework and the data collected in mixed method, demonstrate DDR as politically and socially embedded framework processing in non-mission settings like Kurdistan workers party, not as post conflict intervention.

Normative Adequacy of IDDRS in Non-Mission Settings: Assessment of Next Generation of DDR in Kurdistan Workers Party Context

Imagine 12 years girls, living in a village of Kurdistan region of Iraq in the early 1990s, leaving her family in early snowy morning of a cold winter in 1997, deciding to be guerilla, arriving to a PKK headquarters in very late snowy night. Spending 7 years within the group, growing with them and becoming guerrilla, leaving the group at 19, and returning to her family. Challenged by family, system and social norms, forced into arranged marriage, and suffering from its consequences. Starting to rebuilt her life, and adapting to a life she ever wished to live in. Someone must be very talented and adaptable to be able to address all this challenges.

This section examines the normative adequacy of DDRs, based on the experiences of 12 PKK former guerrillas (6 male and 6 females) in non-mission settings (Kurdistan region of Iraq and Europe countries). The analysis of the research is conducted within the framework of the Integrated Disarmament, Demobilization and Reintegration,

giving focus to the Next Generation of DDR (2017 - 2023) which is known with three main lines (flexibility, adaptability and inclusion) in non-mission settings most of the time in conflict areas, yet producing functional results. The research examines the experience of PKK guerrillas; because the party and its armed group are one of the groups reflect the core conditions of Next Generations of DDR. They are active in conflict environment, and their former guerrillas integrated in the absence of DDR framework. Moreover, the party adopts the concept of Democratic Confederalism, which was systematized and politically operationalized by its founding leader Abdullah Öcalan. In his book titled Democratic Confederalism, Öcalan defines the term as a non-state social paradigm highly based on participation of communities in the frame of decentralized state. In this model state or high-level power's main role is to coordinate communities will, because decision-making power is in the hand of local communities. The core connection between Öcalan's Democratic Confederalism and adaptation of Next generation of DDR is Democratic Confederalism intends to reframe DDR from a state centered and international mission demilitarization framework to society centered but political transformation project. (Öcalan 2011). However, PKK with the leadership of Öcalan adopts Democratic Confederalism, but in his, "call for peace and democracy" issued on Feb 27, 2025, Öcalan for the first time mentions concept of "Democratic Society" and calls for "Voluntary Disarmament of PKK", which is again it contains elements of DDR with focus of Next Generation of PKK.

The analysis draws 12 semi structured interviews with former combatants of PKK (6 male and 6 female) to be able to do gender comparative analysis. The youngest age among the interviewed former guerrillas is 39 years (born in 1985) and the oldest age is 63 years old (born in 1962), with active year of been guerrillas ranged from less than a year and more than 23 years. And with earliest mobilizing year ranked 1995 and oldest mobilizing year as 1977. After disarmament process, 10 of them reintegrated in Kurdistan region of Iraq and the rest demobilized in EU countries including Germany and Netherlands. The ex-combatants interviewed are from Kurdish residential areas of Türkiye (5), Syria (1) and Kurdistan region of Iraq (6). Their identity is Ethnic identity is Kurdish except for one of them, who is Kurdish Alevi from Kurdish residential areas of Türkiye. Their level of education before joining PKK varies, five of them finished primary level or they were in primary level, four of them either finished secondary school or they were in secondary school, two of them are holding associated degree and one of them holds Bachelor's Degree. In addition, three of them (two female and one male) finished Bachelor's Degree after their reintegration. Their marital status before joining PKK divided into married and single, one out of 12 married before joining PKK, which is a male combat, the rest all were single. But their marital status differs after reintegration, for instance eight of them married after reintegration (five male and three female) and three of them remain single (two male and one female). 10 of the ex-guerrillas interviewed have children (one of them have children before marriage and nine of them have children after reintegration).

The analysis of the data, apply a comparative logic, which is IDDDR principles, their normative expectation, their observed practice, the normative gap and interpretation of the Next generation of DDR including adaptation and functionality. The details explained in Table 1 below.

Table 1. Comparative assessment of IDDRS normative principles against observed practice in the reintegration of PKK ex-combatants

#	IDDR Principles	IDDRS	Observed Practice	Normative Gap	NG/DDR Interpretation / Concept
		Normative Expectation/s			
1	Disarmament & Demobilization voluntariness	Disarmament and Demobilization should be voluntary rooted, yet formally managed by related parties. Moreover, it should be institutionally recognized.	Disarmament happened gradually yet voluntary basis, driven by various factors. For instance, 11 out of 12 participants disarmed and disbanded as result of internal armed and political conflict inside the party. However, one female Ex-guerilla disbanded due to a social factor; her involvement in a romantic relationship with a fellow male guerilla, which contradicts the parties' internal regulations. Moreover, demobilization process never happened.	The demobilization mechanisms are absent	Consistent with the NG-DDRs and its recognition of informal exit pathways for Ex-combatants. For instance, in NG-DDR demonstrates that, disarmament can be achieved voluntarily in non-mission and conflict settings, without institutionalization and formal recognition. For instance, all PKK Ex-guerillas interviewed disarmed in the continuation of the armed conflict between the party Türkiye, in a region witnessed continues political and armed struggles like, fall of Saddam Hussein's regime, Arab Spring, raise and fall of ISIS, Kurdistan region uprising in 1991, Jin, Jiyan, Azadi" (Woman, Life, Freedom) uprising in Iran in 2022, and many more.
2	Socio-economic Reintegration	Provision of necessary vocational training, supporting them and providing	As there was no formal DDR program in place when the PKK Ex-combatants disarmed, none of them received	Absence of DDR or organized economic support.	In NG of DDR state tailored and informal economic reintegration considered as adaptive substitutes. Moreover,

#	IDDR Principles	IDDRS Normative Expectation/s	Observed Practice	Normative Gap	NG/DDR Interpretation / Concept
		them with income, and assisting them to have access to employment.	formal economic assistance, neither in IKR, nor in Syria, Germany, and Netherlands. Consequently, economic reintegration received through informal channels. For instance, 6 out of 12 Ex-guerrillas depended on the free labor market, three out of 12 depended on their political network with PUK and KDP, two of 12 depended on their family support, and one out of 12 supported by PKK, because of the political engagement with the group. To achieve their economic independency they faced many challenges.		reintegration happens in existing economy. However, the DDR framework was absence and economical integration was hard to the PKK EX-guerrillas, but all of the participants have similar experience in the economic reintegration.
3	Psychosocial and physical Well-being	Access to psychological and social support	All 12 former combatants interviewed reported; they had no access to neither psychological nor physical services in formal basis. As there was no DDR framework in place, neither the host countries nor the state systems provided Ex-guerrillas well-being	Absence of psychosocial and physical DDR component	Psychosocial support considered as dimension requiring with intervention of the institutes in NG of DDR. This is similar to the experience of PKK Ex-Combatants interviewed, but still needs institutional intervention in case of the implementation of in conflict setting of

#	IDDR Principles	IDDRS Normative Expectation/s	Observed Practice	Normative Gap	NG/DDR Interpretation / Concept
			services following their disarmament. For instance, 11 out of 12 of the Ex-guerillas confirmed they had no access to well-being services, except for one who sought psychological support on personal basis. All of them reported, they experienced psychological severe challenges and trauma, particularly in the three years following the disarmament, they continue experiencing it.		PKK.
4	Community Rooted Reintegration	The community should be involved in support acceptance of the Ex-combatants and reduce the stigma.	In context the study has been done, no substantive reintegration happened, all Ex-guerillas interviewed described themselves as survivors who have been given right to live only because they are Kurdish, regardless of how they live. Eight out of 12 agreed they hide their background as combatants, only their immediate social network knows about their background, for different reasons,	Absence of formal community-based reintegration programs.	However, informal inclusion aligns with the framework and principles of NG of DDR, which gives focus to community-based reintegration, the reintegration process remains fragile, as exists in the case of Ex-combatants of PKK, they never experienced real reintegration. The combatants, the community and the system never been on the same page on reintegration.

#	IDDR Principles	IDDRS Normative Expectation/s	Observed Practice	Normative Gap	NG/DDR Interpretation / Concept
5	Institutional Coordination	Coordination involvement of state (Legal body & legislative executive institutions), international bodies and civil society actors	some because of the fear of retaliation, some because of the social view of society especially the female ones, others because of the security threats by both PKK and Türkiye. Five out of 12 have no legal statue and no access to legal rights, due to legal codes of Kurdistan region of Iraq, Since the context absence a formal legal framework, no coordination existed between state, legislative bodies, international bodies and civil society actors. States involvement particularly in Kurdistan region of Iraq is in a minimal level. For instance, Kurdistan regional governments involvement in support process is limited to giving the Ex-combats temporary presidentship, with no access to other legal papers as passport and national ID card.	Lack of DDR coordination.	It is state tailored DDR implemented under the NG of DDR framework and principles. It manages reintegration indirectly through the executive and legislative bodies of the country. However, it never happened in the context of the Ex-combatants of PKK, interviewed.
6	Inclusion & Nondiscrimination of the Ex-	There should be equal chance of access to the	All 12 Ex-guerrillas reported discrimination and inclusion of	Lack of DDR discrimination	NG of DDR considers No-discrimination and inclusion a context

#	IDDR Principles	IDDRS	Observed Practice	Normative Gap	NG/DDR Interpretation / Concept
		Normative Expectation/s			
	combatants.	reintegration support regardless of gender, ethnicity, political or religious background.	different levels and different types, sometimes faced different types in the same time. For example, 10 out of 12 faced direct discrimination of the basis of their race and their gender, 10 out of 12 faced indirect discrimination in the same time because of the policies and regulations of the places they disarmed in. Additionally, three out of 12 experienced harassment (all female). And 3 out of 12 reported experiencing victimization, because the reported in the discrimination, following their disarmament.	related program.	dependent and negotiated subject, rather than a programmatic subject. It aligns with the context of PKK and experience PKK Ex-combatants experienced.
7	Sustainability: Lowest risk of remobilization	The reintegration process should reduce risk of remobilization as much as possible	No evidence of remobilization witnessed among the interviewees, however no evidence of total demobilization witnessed.	Lack of Demobilization strategies, towards the sustainability.	However IDDRs indicates functional reintegration, and it is in consistent with NG of DDR expectations, but the experience of PKK Ex-combatants does not include this.

The analysis of the table reveals the structural difference between lived reality and experience of the PKK Ex-guerrillas interviewed and the IDDRs linear, frame and programmatic assumptions. This appears when we give focus to disarmament and demobilization, because disarmament happens, while demobilization never

experienced. For instance, IDDRs is a state recognized process working under international framework, with clear exit pathway, the PKK Ex-combatants describe the process as, “One foot out the door” and “its written all over my face”, uncovering the fact that following their disarmament, they did not experience demobilization, the process neither social nor politically real. “My disarmament process was gradual, I remember I joined PKK when I was 20, It was 1988, after five years of been active combat, I come to conclusion, this is not my way. I had different idea, different vision and different opinion. It took me 12 years to disarm. I disarmed in 2005. But I know this background remains with me forever! Not as something I ashamed off! No! I am proud of fighting for my nation! But the thing is, the live I lived psychologically, socially and politically will remain with me forever” SM12 describes his experience and background as guerrilla. This pattern illustrates of on the key insights of NG of DDR, which considers voluntariness of disarmament as non-institutionalized process to be effective. But it also demonstrates the sensitivity and criticalness of the context of PKK. The interviews demonstrated that, however no evidence of remobilization witnessed, but there is no prove of demobilization, because none of the Ex-guerillas interviewed experienced demobilization.

The socio-economic reintegration comparative analysis in the table shows how informal systems substituted in the absent of IDDR in the context of PKK. The Ex-guerillas achieved their economic survival through informal labor market, family support, political network in Kurdistan region of Iraq. In contrast in Germany and Netherlands they achieved it through migration linked labor programs. For instance, S2 is a female Ex-combatant, in her 50s living in Germany, she achieved her economic survival through migration linked labor programs, so as SM 11, male Ex-combatant who lives in Netherlands. In contrast, to SM 10, male Ex-guerrilla who is in his 60s and S2 female Ex-guerrilla who is in his 50s, who received their economic survival through informal labor market. Such accounts highlight NG of DDR's principles, where economic incorporation occurs in market structures already exist. However, it demonstrates that context in the context of PKK the Ex-guerillas face very challenging moments to achieve it. As SM 12 describes as, “We breath but do not live”. The analysis of the table also shows the critical limitation of psychological and social well-being of the Ex-combatants. Despite functional integration in economy, physical and psychological challenges the Ex-combatants live with reveals the failure of informal substitutions. As S5 reflects, “I steal have dreams of fighting as guerilla at night” and SM states, “I can not work because of my physical disabilities”. This suggests that, while Next generation of DDR can accommodate non-institutional rooted integration in economy, physical and psychological survival and recovery remains fragile domain. Eventually, the dimensions of Community Rooted Reintegration, Institutional Coordination, Inclusion & Nondiscrimination of the Ex-combatants and Sustainability: Lowest risk of remobilization illustrate that how reintegration under the Next generation of DDR is political invisibility dependent, negotiated and conditional, rather than coordinated state-international framework. This based on the fact that, Ex-guerillas interviewed demonstrated that they reintegrated, they did it through political networks, kinship, and state adopted residence programs and arrangements. As SM 12 explains, “I am accepted as long as I pretend to be someone else, not because I do not

accept my identity, but because it is hard to other to accept it.” Taking all together, the table illustrates that, DDR in non-mission settings, particularly in context of PKK can function without institutional visibility, but it is worth mentioning that there will be a cost, especially in psychological and physical neglect, inclusion and discrimination, legal precarity. These outcomes are key insights that advance the boundaries and limitations of Next Generation of DDR.

Gender as Variable in reintegration of PKK Ex-guerrillas: Analysis of Feminist security study

Imagine it is 2000, it is 7th congress of Kurdistan workers party, women inside the party are combatants and head of armed units, they have their own military unit and are independent, but decide to cut their hair as form of protest to show they are not agree to go under men's authority and continue their semi autonomy. This is a very well turning point in the history of Kurdistan workers party in terms of fighting for gender equality. It also shows an equation of contrast in the reality of the party.

Portrait of women inside Kurdistan Workers Party always decided by what PKK leader Abdullah Öcalan, defines, “Oldest colony” or “first nation colonized” and the image of women inside the party drawn by as guerrillas, commanders and military and political leader. But where does all this come from? It mainly comes from the perspective of Öcalan to women, because he sees women not as biological or social category, rather as central historical and civilization concept. His core thesis is that the first and most fundamental form of class oppression in human history was the enslavement of women by men. He argues that before the emergence of economic classes like slaves and masters or workers and capitalists, a gender - based class system was established with the rise of patriarchy and the state (which he terms “the domination of the state civilization”). Therefore, Öcalan defines women as; The first colonized nation or the oldest colony (Öcalan 2013). Moreover, if we take a look on chronology of rise of women's power we realize that women have history that embedded in all historical phases PKK went through in the past. For instance, in 1970s and 1980s women had presence inside PKK, but they had no executive power and they were not decision makers. In late 1980s and early 1990 because of the intensive armed conflict between PKK and Turkey great number of women became combatants inside the party, and they took their place, but the manhood mentality in the party was banning their power from being decision makers and the mentality of “war is man's business” was popular. In addition, the women in one side were essential to the party as combatants, yet excluded from decision making. 1995 witnessed a great change when for the first time under the supervision of Öcalan, first women's guerrillas unit established and this was a turning point, but again this was not continued, because when in 1999 Abdullah Öcalan been arrested, the opposition voices rose against women. This disagreement was aligned with other internal conflicts of PKK. There was discussion whether, after his capture, Öcalan remains as active political leader of PKK or as symbolic. After this, the same group were discussing, women should be subordinated under men's power. The protests against this opinion started inside PKK by female guerrillas, they started an uprising with objective of, “whatever happens no way, men will make decision for us”, in the 7th congress of the party a group of female

guerillas cut their hair, their uprising marked a new era in the history of gender equality concept inside PKK, because it broke the ice and created a new era where women have their own organizational structure. Years after women formed their own stable structures. Women's military forces formed and Kurdistan Women's Community (KJK) formed, which is the autonomous, female only umbrella organization within the broader Kurdistan Communities Union (KCK) which is affiliated with the PKK. Now women have right to veto decisions will affect women, they have independent decision-making ability and embedded in the institutions ruling the party.

This section evaluates gender as a central analytical variable shaping post disarmament reintegration among PKK ex-guerillas. Drawing on feminist security theory, and building on the earlier comparison between IDDRS and the Next Generation of DDR (NG-DDR) framework, the analysis examines how reintegration outcomes differed between male and female ex-combatants. The empirical basis for this analysis consists of 12 in depth interviews, equally divided between 6 male and 6 female ex guerillas, allowing for a balanced and systematic gender comparison. Interview data were coded by gender to identify patterned similarities and differences across three dimensions: access to resources and support, social acceptance and stigma, and challenges in entering civilian life.

All the female guerillas who interviewed experienced the developments discussed inside PKK, some of them witnessed the hair cut protests and they were part of it, for instance the years of their mobilization is 1993, 1993, 1996 1997, 1997, 1997, and they demobilized in 2004, 2004, 2007, 2007, 2007, 2008.

Gendered Background Conditions and Reintegration Context

Background characteristics reveal important gendered conditions shaping reintegration trajectories. Male participants were generally older at the time of disarmament and tended to have longer or more continuous combat histories, in several cases spanning over two decades. Female participants, while slightly younger on average, also reported extended periods of involvement, ranging from seven to 15 years. Educational attainment across the sample was modest; however, women were more concentrated at primary and secondary levels, while men concentrated of high education and secondary school, were more potentially constraining post - conflict economic mobility. Moreover, a greater proportion of the female members originate from towns, whereas most of the male members come from cities. These background differences intersected with gendered social norms to shape distinct reintegration pathways, supporting feminist security theory's emphasis on how gender structures vulnerability and access in post - conflict settings.

Gendered Access to Resources and Support

The findings show that a clear gender differences emerged in relation to access to economic and social support. Among male ex-combatants, reintegration into the informal labor market was more common and relatively less contested. Family networks, political affiliations, and community ties, particularly in the Kurdistan Region of Iraq, facilitated access to work and income. Masculinity functioned as a

social resource, aligning with expectations of men as economic providers. As SM12, male ex combatant reflected; “When I disarmed, I began working in journalism and my salary was only \$150. I told myself: if I can at least afford a sandwich each day, that will be enough. Yet the transition was far from easy. Without strong self-discipline, it is possible to lose direction, especially after dedicating most of one’s youth to armed struggle and then returning without having achieved the intended goal. Under such circumstances, the adjustment becomes profoundly difficult. Nevertheless, in order to continue living, one must find the strength to stand again, and that is what I did.”

Female ex-combatants, by contrast, encountered more restrictive forms of support. While family assistance was sometimes available, it was often conditional and embedded within expectations of dependency, domesticity, or withdrawal from public life. Feminist security theory helps explain this asymmetry: women’s participation in armed struggle disrupts dominant gender norms, yet reintegration processes often seek to restore those norms. S2 recounts her experience as follows: “When I was a combatant, my family tried several times to bring me home, but I did not obey them. After leaving the PKK, they struggled to accept me because of my background and personality, which was understandable, so they sent me to live with relatives. I remained there until I got married. This rejection extended to society at large; when applying for jobs, all I knew was journalism, yet I was repeatedly refused due to my background.” S2 further elaborates: “When I eventually returned, my family allowed me to live with them, but they did not fully accept my personality. I spent many days and nights alone, grieving the loss of friends and family who had been combatants and navigating the challenging social circumstances. I endured this isolation alone, and finding employment was extremely difficult. Although I had a job before joining the PKK, securing work after leaving the organization proved far more challenging because of my past I faced both security and social challenges.” Similarly, S3 reflects on her own reintegration, describing the situation as profoundly difficult: “Due to widespread unfounded social rumors about me, I was unable to work at all until after I married and divorced. This process took nearly twenty years, after which I was finally able to reintegrate and gain employment.”

In the absence of formal DDR mechanisms, informal systems substituted for institutional support. However, consistent with NG-DDR insights, these informal substitutions were unequally distributed, reinforcing gendered hierarchies rather than neutralizing them.

Social Acceptance and Gendered Stigma

Gender had a pronounced impact on social acceptance and stigma. Male ex-combatants generally experienced conditional acceptance, particularly when concealing their former combatant identities. Their past involvement was often interpreted through political or nationalist narratives, allowing for partial reintegration into community life. For instance, SM12, says: “most of the times we hide our identity as people from Bakur (North of Kurdistan located in Türkiye), and simply narrates at, we are her to work. This allowed as to reintegrate more easily”.

Female ex-combatants faced more intense and multifaceted stigma. Beyond political suspicion, women were subjected to moral judgment, harassment, and social

exclusion. Feminist security theory highlights how female combatants are frequently perceived as transgressors of norms related to femininity, honor, and sexuality. S3 describes her experiences, stating: “When I left the PKK, my family did not accept me, first, because of all the false rumors circulating about us as guerrillas, and second, because they had never known when I chose to become a combatant and left the family. Upon returning, they sent me to live in house of a local social leader who was more understanding of my situation. The only solution seemed to be marriage, how long could I remain there otherwise? They arranged for me a man who knew my background as an ex - guerrilla and accepted it. We married, and for more than a decade I lived in a hell with him and his family. They constantly reminded me, ‘you are a man, not a woman,’ referencing my time as a combatant. He was abusive toward me and my children, and it took over ten years before I could divorce.” S1 similarly reflects: “It was extremely difficult after all the years I spent as a combatant. It is not only society; you also struggle to adapt to the system and the people, having previously interpreted their ideologies or personalities differently. Even now, I find social life challenging.” S5 adds: “It is not easy. I generally have no connection with my neighbors like a normal person would in our community, and sometimes I feel out of place in social conversations. At times, even going to the market to buy clothes for my children is difficult. After all these years as a combatant, my focus remains on aspects of my former lifestyle, and living in society under these conditions is not simple.” S2 also says; ‘after 20 years I still have no friends’.

This gendered stigma limited women’s willingness to disclose their pasts and restricted access to social spaces. While NG-DDR conceptualizes invisibility as an adaptive strategy, this analysis demonstrates that invisibility carries higher social and psychological costs for women, often requiring the suppression of identity and political agency.

Gendered Challenges in Entering Civilian Life

The transition into civilian life revealed further gendered challenges. Male ex-combatants primarily emphasized legal insecurity, economic instability, and political marginalization, yet often framed these difficulties as manageable extensions of wartime hardship. As SM12 describes it as, “difficult but with the personality PKK gave him manageable”. Female ex-combatants, however, experienced what feminist security scholars describe as double reintegration: re-entering civilian society while renegotiating gender roles and expectations. Many faced pressure to marry, prioritize caregiving, and disengage from political life. Five out of six female participants were married with children, intensifying emotional and economic responsibilities. As S3 says; “The only solution seemed to be marriage”.

These challenges were compounded by the absence of psychosocial support identified in earlier chapters. While both men and women reported trauma, women faced greater barriers to seeking or articulating psychological distress due to stigma and social constraints. This reinforces a key NG-DDR finding: informal reintegration mechanisms may enable survival, but they fail to address gendered psychosocial harm, particularly among women.

Implications for DDR and NG-DDR Frameworks

This gender based analysis challenges the implicit gender neutrality of IDDRS and strengthens the conceptual contribution of NG-DDR. While IDDRS formally acknowledges gender, its programmatic assumptions limit applicability in non-mission settings where social norms, rather than institutions, govern reintegration. NG-DDR, when combined with feminist security theory, offers a more accurate understanding of reintegration as a gendered, socially embedded process.

The findings demonstrate that adaptability alone is insufficient. Without explicit attention to gendered power relations, informal reintegration reproduces inequality, stigma, and exclusion. Gender should therefore be treated not as a secondary variable, but as a core analytical category essential to understanding post-conflict reintegration and long-term stability.

Reconceptualization of DDR as socially and politically embedded framework; Advancing Next generation of DDR through PKK's Ex-guerrillas experience in non-mission settings

“For more than 100 years, the denial of Kurdish identity in Turkish state took social peace under question and limited it, as the border system and legal framework built around this logic, consistently defining PKK guerillas as terrorists” says 57 years old Kurdish CL6 military expert, who describes his background knowledge of Kurdistan workers party and the context they are active in as “35 years old background”.

This section discusses the advancement of Next generation of DDR on the basis of reconceptualization of DDR as socially and politically embedded process, not post-conflict or technocratic intervention. The analysis drew on lived experience of 12 PKK combatants (6 male and 6 female), eight community leaders with different professions (journalists, social leaders, law and military experts and academic people), elite (206 Xs) and public perspective (50,51 Xs) of Türkiye (2010 - 2025), the analysis of findings show that reintegration in the context former PKK guerrillas disarmed in which is the context of unsolved narrative securitization shaped by political discourse, public perception and community power relations, rather than formal DDR mechanism. With integration of qualitative interviews data and quantitative social media data the study operationalized Next Generation of DDR as context sensitive model, which is able to work in complex social, political and security contexts, where armed groups and organizations have not undergone formal DDR missions or formal peace agreements, as PKK is living in.

Conventional DDR models, including the ones articulated in IDDRS, assume transition of the armed group and the context from conflict to post conflict, where reintegration depends on legal normalization, institutional programs and social reconciliation process. However, neither the context the PKK guerillas disarmed in nor the context PKK is active in Türkiye conform this assumption, because of the negative discourse of public against PKK, continual of state security operations against it. Meanwhile, Next Generation of DDR is able to respond to such a context, because it shifts the focus from formal program to a social process and from post conflict framework to politically contested continuity and from institutional program to societal

legitimacy. This perspective tested in the study by examining how reintegration negotiated in context the PKK Ex-guerillas reintegrated in.

The analysis of elite social media (n=206) which includes, political figures (33), 10 noticeable media outlets (Hurriyet, Milliyet, Sabah , Ntv, TRT Haber, Gazete Duvar, Cumhuriyet, CNN Türk, A Haber, Anadolu Ajansı), and all political parties of the country, reveal state military resolve, condemnation and victimhood.

Table 2. Elite social media engagement with PKK-related content on X (formerly Twitter), 2010–2025 (N = 206)

#	Key Statistics	Value	Note
1	Number of total tweets/Xs analyzed	206	
2	Number of verified accounts/users	41	
3	Verified users	0	
4	Total likes of the contents	637116	
5	Total Retweets	108233	
6	Average engagement	0	
7	Likes for tweets with Pro-PKK content	110683	
8	Likes of Anti-PKK contents	462115	
9	Neutral Likes	64318	
10	Tweets with the usage of profanity	3	These tweets are embedded within the total of 206 identified tweets, their likes counted in the overall engagement figures or engagement count.
11	Likes of the Tweets with the usage of profanity	78337	

The dataset reveals the political figures, media outlets targeted and political parties of Türkiye produced securitized narratives of guerrillas of Kurdistan workers party, highlighting the victimhood, state military resolve and condemnation. For instance, the key themes used in the contents published include: (1) remembrance of “terrorist attack of Türkiye” and its victims; (2) seeing withdrawal of PKK as result of state counterterrorism efforts; (3) commitment to intelligence and military operations of Sate against PKK and its so called affiliates cross border; (4) clear rejection of any concessions to PKK, meanwhile highlighting the constitutional values, territorial integrity and threats to national security and keeping it safe; (5) calling the 2025 peace efforts “Terror Free process” and desire to push the country towards it; (6) Commitment of the state to continue combating PKK, which they call it “terrorist”; (7) Emotional affect of the attacked “they call it by PKK” on the families of the victims; (8) criticism on clemency pushed towards PKK. Moreover the analysis of the data

shows that out of 637116 different users did for the contents published, the anti-PKK contents attracted more audience with 462115 users liking them, while the Pro-PKK contents were not very much attractive by Turkish language users with 110683 likes by different users to the Pro-PKK contents. While, 64318 liked the neutral contents. Nevertheless, the analysis show the use of profane language against PKK in three contents, and what is more interesting is, the tweets been detected liked by 78337 users. The findings the of the analysis of the Tweets of elite in Türkiye, align with the analysis of the 5,050 Twwets gathered and analyzed randomly.

Table 3. Public social media engagement with PKK-related content on X (formerly Twitter), 2010–2025 (N = 5,051)

#	Key statistics	Value	Note
1	Total Tweets been analyzed	5051	
2	Verified users	17	
3	Unverified users	5034	
4	Average engagement	30.06	
5	Total likes of the contents published	35315	
6	Total number of Retweets of the contents published.	139768	
7	Likes for tweets with Pro-PKK content	6729	
8	Likes for Tweets with Anti-PKK content	24129	
9	Likes for the neutral contents	4457	
10	Tweets with the usage of profanity	1357	These tweets are embedded within the total of 5,050 identified tweets, their likes counted in the overall engagement figures or engagement count.
11	Likes of the Tweets with the usage of profanity	7068	

The analysis of the public dataset shows great alignment with narrative the elite of the public created. For instance, 35315 users liked for 5,051 tweets published, among them 6729 users liked the contents with Pro-PKK content which makes %19.5 of total content, while users who liked Anti-PKK content is 24129, which makes %68.3. Furthermore, same as the narrative elite of Türkiye produced, there is usage of profanity in the tweets of public, for instance 1357 Tweets out of total contain profanity language, and 7068 users liked the Tweets. This makes 20.1% of the Tweets published by public, meanwhile %12.3 of the Tweets published by elite contains same language. It is the same for Pro and Anti PKK language, for instance the analysis of the

elite show that %72.5 of the users liked Anti-PKK contents, and %68.3 of the public the same liked Anti-PKK contents. Moreover, %19.05 of the public users likes Pro-PKK contents, only %17.37 of the elite of the liked Pro-PKK contents.

The analysis of both datasets aligns with the qualitative data collected from interviews of the community leaders. Six out of 8 community leaders answered this question; How can communities be prepared to accept and support returning ex-combatants? They are all agree, that legal and constitutional preparations should be made for the Ex-guerrillas should be made, in term of amendments of Anti-Terrorism Law No. 3713 (1991) or cancelation of the law, and constitutional redrafting with purpose of defining all national minorities and Kurdish nation, to give them right of equal citizenship as given to Turkish identity in terms of legal statue and civil rights. Six out of eight community leaders agree, to keep social security of Türkiye and Ex-combatants safe, social planning is necessary, before, during and after the reintegration, making it sustained and long term. For instance, CL2, who has 13 years of experience of covering stories from armed groups in Iraq, Iran, Syria and Türkiye, sees the social reintegration as “real challenge” saying; “While related actors and NGOs see this stage of discussions between PKK and Turkihs state as tough, the real challenge is wining the trust of Turkish society to support and pursue sustained peace process with PKK Ex-guerrillas and Kurdish people. It has been more than 100 years that they system depicts Kurdish people as the countries antagonist, and PKK as terrorist who acts as threat to social and national security, this is triple the age of PKK, changing this mindset and the entrenched narrative they adopt, no easy step”. Inline with CL2’s view, 47 years old CL9 who holds PHD and one of the main units of this PHD thesis is on the history and development of the ideology of PKK, thinks, “the complexity of conflict PKK is in extends beyond its confrontation with Turkish state, it also involves complex tension between the party and certain local groups, particularly the tribes. So, the tribal leaders must be engaged in the process, their role should guarantee social peace for both the Ex-guerillas and community”. The findings of this section indicate that the space the reintegration must occur in (Türkiye) is antagonistic to PKK guerrillas, indeed it is insight central to the Next generation of DDR, as “there is no language of safe transition and reintegration in public debate nowadays in Türkiye, because of the 100 years background of denial of Kurdish identity, only victory, vigilance and punishment”, this creates clear mismatch between DDR norms and lived reality in Turkish society, while within Next generation of DDR such environment works as informal veto mechanism of reintegration of PKK guerillas. Even in the cases where combatants (PKK guerrillas) disengage their armed background, society labeling, particularly the use of the words like “terrorist” restricts access of the guerrillas to social trust, economic opportunities and community participation. As 58 years old CL3 social leader articulated this dynamic as, “imagine 41 years of defense against a state, now integrating to the same system is quite art of reconciliation. The findings of this section extend Next generation of DDR on the basis of the observation, demonstrating how public discourse is able to shape reintegration.

Gendered reintegration in Next generation of DDR

One of the main concepts that Next generation of DDR emphasizes on is the need of considering gendered social norms and power dynamics will design reintegration process beyond the DDR standards. The qualitative interviews reveal how both gendered experienced stigma, and their trajectories shaped by their gender. For instance, female Ex-guerrillas describe the experience as a process marked by social silencing, and moral scrutiny, rather than being Ex-guerrilla, as S2 explains the experience as, “I have always been alone, back in IKR, and now in EU. My father disowned me; I did not have chance to see him. I was politically, socially and economically labeled by my background”. The male Ex-guerrillas by contrast, emphasized on economic exclusion and legal statue, rather than physiological barriers, and social exclusion. This gender perspective of reintegration is confirmed by most of the community leaders interviewed. Most of them agree that gender does matter when it comes to reintegration, because the community the PKK guerillas will reintegrate in is strongly structured by social boundaries. It is also worth mentioning that, they are all agree that strong educational and cultural background of PKK guerillas, and the programs they attend before becoming active combatant make them different from a normal combatant, especially the female ones. The findings demonstrate that Next generation of DDR in the context of PKK must move beyond gender inclusion, as the analysis of the data confirmed that how gender shape reintegration.

Informal reintegration; a DDR beyond formal programs

In the absence of formal DDR framework and DDR programs, reintegration in the context of former PKK guerillas occurred through informal adaptive strategies, as the Ex-guerrillas describe them as economic dependency on relative networks around, deliberate social invisibility, internal displacement, and deliberate political invisibility. As SM 10 male Ex-combatant who spend 23 years of his life as combatant describes it as “had process, but adaptive one” because as he says; “the personality PKK ex-combatants have is very morally and culturally reach, they ideology they get within the party teaches them how be resilience and confidant in the same time, because most of them come from country keeper families (welatparêz) with strong national background, after joining PKK they get training courses of different topics such as; gender, Kurdish nations history and personal development, then they become combatants. However, this will not make them safe from all the challenges they face when they reintegrate, resilience yes, but safe, no”.

According to Next generation of DDR, the startigies used by Ex-PKK guerillas are coping mechanism rather than successful and sustained reintegration. This is what makes the reintegration process so different, because in such a contexts reintegration becomes survival mechanical negotiated in political and social context full of constraints. All these insights support Next generation of DDR's call for a socially grounded reintegration mechanisms and context sensitive DDR, rather than classical DDR framework. By integrating lived experience of Ex-guerillas of PKK and perspective of community leaders from different sectors with quantitative analysis of public and elite perspective, the research advances Next generation of DDR as a

framework capable of operating in non-mission complex settings. Moreover, it shows reintegration process of Ex-combatants (Ex-guerrillas of PKK) as a socially negotiated, politically mediated, and constrained process, rather than a post-conflict framework. The findings also confirm that, community norms, public perception, and social boundaries function as reintegration variables (critical ones), able to shape the outcomes of disarmament independent of formal policy frames. Meanwhile, gendered social and economic expectations further impact the outcomes of reintegration trajectories, while informal mechanisms dominate the context because of absence of formal DDR framework. In doing so, the study contributes to Next generation of DDR as politically and socially embedded reintegration framework.

Conclusion and discussion

"We are foreigner even to ourselves."

"Being a foreigner has become our defining condition. We are foreigner even to ourselves. You label me as former combatant or Ex-guerilla, but I no longer inhabit the role you mentioned! People define me as someone from Bakur (North or Great Kurdistan located in southeastern and eastern Anatolia, Türkiye), but it has been 18 years that I didn't see my town, everything changed, since I left, the place, the houses and the people. Even my father died! Am I from Kurdistan region of Iraq? No! because I hold no legal statue of the region! So, we are a group of foreigners! And I have come to accept the reality I live in!" Says 57 years old SM12, a male combat who spend almost 18 years of his life serving as senior guerilla with PKK, and disarmed in 2005.

Developing a Next Generation of DDR concept in the context of the PKK: "I am proud of having fought for rights of our nation and our national identity as a Kiurd. But my struggle and challenges did not end there. Together with our friends we continue discuss the political situation and exchange opinion on it, yet we face difficulties and challenges in our social life. When I become mother, I understood the pain I caused my own mother once. For many of us experiencing social life in such a context less likes freedom, but more like open prison" said 52 years S4 female Ex-guerilla, who spend 10 years of her life as senior combatant, disarmed in 2008 and now mother of three. The study set out to examine the applicability and limitations of conventional DDR framework in non-mission setting, through the use of case of Ex-guerrillas of Kurdistan Worker's Party. It also engages critically with IDDR standards and advancing the Next generation of DDR. It also conceptualizes DDR as politically and socially embedded process rather than a post conflict intervention. The study provides empirically grounded and theoretically informed contribution towards achievement of peace and security goal, through adopting a mixed method research design, which contains 20 depth interviews with Ex-PKK guerrillas and community leaders alongside a large-scale quantitative data collected in X social media platform to uncover the elite and public discourse in Türkiye.

The study uncovers set of several findings, for instance it demonstrates that reintegration can occur in non-mission settings in the absence of formal DDR liked institutions. In such contexts, Ex-combatants depend on informal mechanism like political networking, family, community mediation, political affiliation and free market. Moreover, the adaptive concealment strategies used by former combatants used

as alternative to the institutional support given in DDR, this also provides the combatants with basic economic and social survival. However, the analysis of the findings unfolds the critical limitations of this kind of reintegration. In the case study of the research (Ex-PKK guerrillas) physical and psychological needs unaddressed, social exclusion reinforced, and legal precarity largely noticed. The gaps highlighted reveal the boundaries of Next Generation of DDR, when it emphasis on adaptability of former combatants. The findings suggest that, when reintegration happens in conflict settings, legal precarity, prolonged political conflict and contested legitimacy, flexibility is inadequate. In addition, the informal arrangements are able to reproduce vulnerabilities.

Key contribution of the study lies in placing gender as foundational analytical variable. Drawing on feminist security theory, the findings indicate that reintegration trajectories are gender dependent. While male Ex-guerrillas more often accessed to labor market (informal labor market) and achieved conditional social acceptance in society, the female Ex-guerrillas faced limited economic opportunities, intensified stigma, and withdrawal from political life noticeably. What female Ex-guerrillas undergo may be described as “double reintegration”; they are not only reintegrated from their armed background, but are also renegotiated gender norms in society. This means, in the informal reintegration process reimpose of patriarchal norms, rather than accommodate a social and political transformation for former female guerrillas.

Beyond personal narratives, the study advances reintegration process as socially and politically embedded process, politically mediated and socially negotiated. It integrates quantitative analysis of elite and public of Türkiye with perspective of community leaders. The findings of the analysis of the data integrated show that community norms, symbolic boundaries and public perception play important role in shaping reintegration outcomes of former combatants. For instance, disarmament alone cannot resolve the post-conflict and post-disarmament trajectories of former combatants, rather it is a process linked to portraying the former combatants through political discourse, everyday social interactions, public discourse, access to life linked resources, belonging and media narratives. For instance, the findings reveal that both public and elite of the country frame the PKK guerrillas through the security and terror lens, limit the space of social acceptance and push to suspicion of the guerrillas. This shows that reintegration not only shaped by absence of policy frameworks, but by normative barriers, with ability of operating outside of formal arrangements. Taking together, the findings of the study contribute to the advancement of next generation of DDR by providing empirical evidence of its relevance, while highlighting its limitations. The study supports the argument that implementation of disarmament, demobilization and reintegration in non-mission settings must be understood as socially and politically embedded process, rather than a post conflict intervention. However, it warns placing excessive optimism on emancipatory ability of informal reintegration. Without purposeful consideration of gendered hierarchies, power relations and dialog space reintegration process will be risky and unsustainable. In this sense, DDR should be reconceptualized as contested social long-term process not only technical tool.

Notably, certain limitations shape the scope of the study. Access to Ex-combatants of Kurdish Worker's party restricted by security concerns for both the researcher and

the Ex-guerrillas, the main factor behind participants anonymity, as the armed struggle between PKK and Türkiye remains active. Moreover, the legal statue of the Ex-guerrillas of PKK is not formally recognized. The qualitative fieldwork also shaped by time and budget limitations. While the mixed method adopted by the study further strengths the findings, future research could benefit from broader analysis of different armed groups now active in Middle East, give focus to long-term reintegration trajectories and psychological dimensions with aim of deeper understanding of implication of Next generation of DDR in non-state mission.

Ultimately, the research unfolds the need for reconceptualizing DDR beyond formal programs and mission-based framework. By highlighting the story and real live experience of Ex-guerillas of PKK, gendered dynamics and political and social dynamics shaping reintegration, the research contributes to refine and context sensitive reintegration in conflict settings. This reconceptualization is important to further advance Next Generation of DDR in non-mission settings. And it is essential to further advance peace and security in Middle East and empowering it in addressing complex realities of non-state armed groups.

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Ethics Statement

The authors affirm that this research was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The authors declare no conflict of interest.

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PREREQUISITES FOR THE FORMATION OF SOCIO-POLITICAL AND IDEOLOGICAL FOUNDATIONS FOR ARMENIA'S TRANSITION TO DEMOCRACY

ASHOT YENGOYAN* 
Yerevan State University

PAYLAK YENGOYAN** 
Yerevan State University

Abstract

This article examines the socio-political, ideological, and mental prerequisites that shaped Armenia's transition to democracy following the collapse of the Soviet Union. Adopting a qualitative political-science approach that combines the historical-institutional method with a comparative analysis of the socialist and liberal ideological platforms, the study traces how the gradual dismantling of Soviet totalitarianism—beginning with Nikita Khrushchev's de-Stalinization, mass housing construction, and the erosion of the “sacred” attitude toward state authority—created the social and psychological conditions for a positive reception of democratic values among Armenian citizens. The analysis further considers the pressures of economic liberalization, the ideological affinities between socialism and liberalism, and the historically rooted duality of the Armenian mentality, which combines a strong sense of individualism, creativity, and entrepreneurial drive with a conservative, collectivist orientation toward preserving national identity. The article argues that, paradoxically, many of the necessary prerequisites for Armenia's post-Soviet democratic transformation were formed during the Soviet period itself, well before the country achieved formal independence. These findings contribute to a deeper understanding of the socio-cultural foundations underlying post-Soviet democratization processes in Armenia and the South Caucasus more broadly.

Keywords: *Armenia, democratic transition, post-Soviet transformation, socio-political prerequisites, political mentality, totalitarianism, Perestroika, political culture, liberalism, South Caucasus.*

* **Ashot Yengoyan** is a Doctor of Political Sciences, Professor of the Chair of Political Science of the Faculty of International Relations at the Yerevan State University. Email: ashotyengoyan@ysu.am. ORCID: <https://orcid.org/0000-0002-2767-9389>.

** **Paylak Yengoyan** is a PhD in Political Science, Associate Professor of the Chair of Political Science of the Faculty of International Relations at Yerevan State University. Email: paylak.yengoyan@ysu.am. ORCID: <https://orcid.org/0009-0008-7211-0248>.



Introduction

On the path toward forming an open civil society, many Western countries typically started from authoritarianism (Dahl 1971; Huntington 1991; Levitsky and Way 2010; Linz and Stepan 1996; O'Donnell et al. 1986) based on market relations (Przeworski 1991). Armenia, like all former republics of the USSR, started from totalitarianism and shared a common path with them until the final collapse of the Soviet system (Laycock 2009; De Waal 2003; Kilbourne Matossian 1962; Panossian 2006). The process of dismantling Soviet totalitarianism was gradual. It was during this period that many socio-political and ideological-psychological prerequisites finally began to take shape (Hough 1997; Sebestyen 2009; Zubok 2021), allowing citizens of the future independent states to positively perceive the many beneficial aspects of democratic coexistence.

The success of reforms intended to establish an open society of equal opportunities, fair social relations based on law, and an atmosphere of free creativity, initiative, and entrepreneurship was tied to the existence of these specific prerequisites. The absence of such prerequisites risked not only the emergence of social chaos and a tendency toward ochlocracy, or the imitation of democratic transformations to consolidate authoritarian political power, but also, consequently, the disillusionment of the broad masses with the ideas of democracy itself.

Despite many negative phenomena in Soviet reality, during the years of its existence, the Armenian people significantly increased their level of self-awareness, political literacy, and developed their political culture and mentality (Sunny 1993). Furthermore, the Armenian nation experienced a period of rapid industrial and scientific growth, which opened broad opportunities for a dignified presence in relevant areas of international public life. The large Armenian diaspora, particularly in Western countries (Shain 2007; Wahlang 2025), helped many citizens of Armenia directly engage with foreign standards of social life, which inevitably influenced the people's desire to achieve a more dignified existence (Rasuly-Palczek and Six-Hohenbalken 2017). In one way or another, paradoxically, many of the prerequisites for the positive perception of liberal-democratic ideas and principles by Armenian citizens were formed during the years of the USSR's existence.

Methodology

This study aims to identify key prerequisites for democratic transition in Armenia. To achieve this goal, a comprehensive approach is used, incorporating methods of political science analysis, comparative research, and qualitative source analysis.

The primary research method is qualitative political analysis, which allows for an examination of the institutional, socioeconomic, and political factors that contribute to the formation of conditions for democratic transformation. Another crucial method for studying this problem is the application of the principle of historicism. The historical-institutional method allows us to examine the formation of the preconditions for Armenian society's transition to building a democratic state as a gradually evolving socio-political process of dismantling the system, which should have led to a logical conclusion. Forced by the pressure of objective circumstances, the retreat of the

authorities of the former USSR from the seemingly "inviolable" communist dogmas prepared fertile ground for fundamental changes in the worldview of citizens. The method of in--depth analysis of this process makes it possible to identify the main prerequisite for the successful advancement of society towards democracy - the maturity of the political consciousness of the people.

The method of comparative analysis of two ideological platforms, socialism and liberalism, clearly highlights many common features between these two world ideologies. In many ways, this community contributed to the formation of a positive perception of liberal democratic values among the representatives of the Armenian nation.

Socio-political prerequisites for the democratic transit of post-soviet republics

The first signs of the dismantling of the totalitarian system occurred as early as the era of Nikita Khrushchev. The exposure of Joseph Stalin's cult of personality (Tucker 1979) brought about the partial rehabilitation of his political victims and a relaxation of repressions. While perhaps not occurring in society as a whole, it became possible for muted dissent to exist within certain segments the Party and intellectual circles breaking through in one form or another into the pages of the Party press.

Another important sign of the political emancipation of society was a kind of "grassroots politicization" in the form of the widespread circulation of political jokes about Soviet power, socialism, and Khrushchev himself (and later, other state leaders). Through this, another pillar of totalitarianism was destroyed in the mentality of the Soviet person: the sacred attitude toward authority.

While this phenomenon is well-known and fairly obvious, insufficient attention is often paid to another equally significant factor in the psychological dismantling of totalitarianism: the mass housing construction initiated by Khrushchev (Gorlov 2017). Millions of Soviet citizens who moved into private apartments were freed from the total, everyday "neighborly" surveillance that had flourished in communal apartments. Furthermore, for the first time, they gained a private life the opportunity to read and keep prohibited literature, listen to foreign radio stations (despite jamming), and converse and debate with friends within their own homes.

Even the slight opening of the "window" to the outside world (the "Thaw" and the policy of peaceful coexistence) triggered a certain "demonstration effect" related to learning about life in foreign countries, which subsequently gave rise to the phenomenon of dissidence. However, a more mass-scale manifestation of this "demonstration effect" was linked to the change in foreign policy carried out by the CPSU under Khrushchev. Finally realizing that focusing exclusively on the international communist movement offered no political (much less economic) benefits in the foreseeable future, the CPSU leadership largely reoriented itself toward a new "progressive force of the modern age" national liberation movements and, specifically, countries of so-called "socialist orientation" (Khudoley 2022). Economic and political cooperation with developing countries triggered a significant flow of Soviet specialists abroad. Ordinary Soviet citizens finally gained the opportunity to see the "other world," which substantially shook their confidence in the absolute superiority of "Soviet socialism."

During this period, a pragmatization of life was already emerging an increasing interest in material incentives and a shift in the ideology of socialism, which from that point forward was reoriented toward personal interests and the values of private life. A clear understanding of equality as equality of opportunity began to take shape; a prosperous life earned through honest means became perfectly consistent with the prevailing concept of socialism.

The increasing importance of mental and skilled physical labor, rising living standards, and other transformations were accompanied by growing public demands. These demands were further influenced by the expansion of the shadow economy, the emergence of new forms of "prosperous" living, and increased communication with developed nations. The "technology of survival" was replaced by a "technology of achieving comfort and well-being." This was the primary factor that fundamentally restructured everyday ideology. While these changes did not lead to a rejection of the idea of socialism itself, they shifted its position within the system of common perceptions. The crisis of the mid-1970s "brought about value shifts, the erosion of ideological structures, a weakening or even loss of the significance of Soviet symbols, and other consequences that rendered the system partially un-reproducible," as L. Gudkov writes (Gudkov 1997, 17).

The Brezhnev period (mid-1960s to early 1980s) intensified the "corrosion" of totalitarianism. Under the conditions of the ruling regime's overt corruption, ideological liberation manifested as a disbelief in proclaimed slogans and ideals. Consequently, this led to a growing separation and even alienation of "real" society from the "official" state (Tomson 2014).

However, while society was becoming alienated from the totalitarian state, it remained entirely within its framework. In the USSR, all social groups were integrated into a single bureaucratic socio-productive organism (Harutyunyan 2024). Regardless of the field of activity whether collective farmers, laborers, or workers in culture and sports, all acted as state employees. Even "creative unions" of writers, artists, architects, or cinematographers were nothing more than bureaucratic branches of the central Party-state apparatus. As the aforementioned authors rightly noted, "society was absorbed by the state, and the state by the 'apparatus'" (Gudkov et al. 1988, 79).

The beginning of Gorbachev's "Perestroika" (rearrangement) (1985-1987) was the "era of the USSR's awakening" within the framework of an "enlightened" authoritarian regime (Brown 2007; Brown 2023; Hardman 2012). However, the expected (and promised) economic acceleration did not materialize, followed too quickly by a political "revolution from above." This process was further accelerated by the efforts of newly emerged "radical democrats." One of Mikhail Gorbachev's fundamental mistakes was mistaking the top-level awakening of public consciousness for the readiness of the entire (or the majority of) real society for serious changes in the social order and production. He and his closest associates failed to account for the still-persistent "patriarchal consciousness" the ideology and psychology of citizens who expected the state to provide for them. The massiveness of the democratic movement was deceptive. The "masses" formed quickly due to the "fashion" for democracy and because of opportunists who had previously served totalitarianism with great flexibility

and had now rapidly rebranded themselves as democrats (unlike the economy and society itself).

In his numerous speeches, while calling upon workers to support his initiatives with a "revolution from below," Gorbachev ignored the fact that civil society was non-existent in the country. The problem lay not only in the fact that the Party-state power dominated society, but also in the fact that society itself (or at least a significant portion of it) lacked the drive for radical transformation, exhibiting a profound sense of constraint.

Nevertheless, the bureaucratic Party-state framework that framed and permeated all of society created some elements of a future civil society under Gorbachev, though this was only the very beginning of the process. That's why laws intended to activate commodity-money and market relations worked poorly. Even the few elements of civil society that emerged during this period (independent trade unions, various associations of industrialists and entrepreneurs, small and medium-sized businesses, banks, and veterans' organizations), which were meant to foster ideological pluralism, very quickly lost their significance (Boettke 2003). Meanwhile, the issues of creating legal guarantees and social-contractual relations necessary conditions for a civil society were pushed into the background, serving only as subjects of fruitless discussion in the media.

Nonetheless, "Perestroika" provided many of the prerequisites for accelerating the formation of a democratic society and ideological pluralism. "Glasnost" (publicity), limited political pluralism, the very possibility of publicly criticizing the authorities, openness to the outside world, and the significant easing of foreign travel all contributed to an atmosphere of general liberation and the broadening of horizons for a vast number of people. In short, it was an entire era of awakening for Soviet society, characterized by a sharp decline in the role of the Communist Party and an internal demarcation within the party itself between reformists and orthodox members. This marked the beginning of the party's separation from the state and public organizations.

Despite the limited and insufficient results of economic reforms, certain socio-economic prerequisites necessary for ideological discourse were established during this period. The first joint-stock companies, cooperatives, commercial banks, and small-to-medium enterprises emerged. Consequently, groups of people appeared with their own emerging specific economic interests that required protection. Economic pluralism was gradually taking hold in the USSR, which was destined sooner or later to lead to political pluralism.

In general, the Gorbachev period saw systemic and structural changes incompatible with totalitarianism, though they by no means ruled out the preservation of authoritarianism. However, it was this period that served as the prelude to the general decomposition of the world socialist system and, with it, totalitarianism in the USSR. It created the prerequisites for free-thinking and ideological pluralism in political life.

In terms of content, Gorbachev's "Perestroika", in our view, intended the implementation of the ideas of liberalism, although from the outset, it was referred to by another word: "democrats" rather than "liberals," for them, the issue was fundamentally about liberal hopes for creating a state governed by the rule of law and transitioning to a market economy (Sedaitis and Butterfield 2019). However, in parting

ways with totalitarianism, the people were unable to accept the opposing system in a short span of time.

Nevertheless, the propaganda of "Perestroika" ideas not only clearly highlighted the negative phenomena of the totalitarian era but also defined the liberal benchmarks for a future democratic society. From socio-economic and political perspectives, the ideas of "Perestroika" finally prepared the peoples of the USSR for a relatively rapid absorption of liberal values. These values were already forging a path within Soviet society and subsequently became the dominant ideology of the future independent states in the post-Soviet space.

Ideological prerequisites for the perception of democratic transformation among Armenian citizens

The intelligentsia was destined to play an enormous role in the ideological orientation of Soviet citizens. Historically, the intelligentsia almost always serves as the bearer of oppositional ideas within society. They are the first to assimilate new political ideas and facilitate their dissemination throughout society. As a result, an increasing number of people and entire social groups previously excluded from public life begin to change their attitudes. They realize that politics directly affects their private interests and that their personal fate depends on decisions made by the authorities. There emerges a more conscious striving for political participation and a search for mechanisms to influence state decision-making. Decades ago, Samuel Huntington proposed a theoretical framework for political modernization that most effectively explains the processes of establishing democratic societies (Huntington 1991), and it was the intelligentsia to whom he assigned the decisive role in this endeavor. By the time of its collapse, Soviet society possessed a vast army of politically literate, broad-minded, and critically thinking intellectuals.

By the onset of democratic transformations, Armenia like nearly all former USSR republics could no longer be classified as a traditional society in the conventional sense. During the Soviet era, it had transformed into an industrial country with a relatively high level of urbanization and education (Karakhanyan 2018; Marshall 2010). A distinct middle class had formed, the core of which consisted of the scientific and technical intelligentsia and specialists interested in the free realization of their intellectual potential.

The intellectual elite of Armenia, while maintaining many similarities with the late-Soviet elite, was notably distinguished by a national rather than a purely social orientation. Special mention should be made of the role of many party officials and rank-and-file members of the Communist Party of Armenia who, contrary to official propaganda, exposed not only the negative aspects of the party officials' dominance but also pointed toward paths for national revival and the establishment of national identity. This was discussed with increasing frequency at general meetings and conferences of primary party organizations. Many Armenian scientists, public figures, and even some republican-level officials all devoted to their motherland found themselves among the ranks of dissidents and non-conformists.

Among the significant achievements of the Armenian Soviet elite was the adoption of the Law on the Recognition of the Armenian Language as the State Language

(Musayeva 2022), alongside Russian, which was then the de facto language of the USSR. Another achievement was the unprecedented scale of publishing works by famous representatives of centuries-old Armenian science and culture. By their example, the Armenian Soviet intellectual elite fostered an atmosphere of spiritual liberation and free-thinking, which can be categorized as a prerequisite for ideological pluralism.

In the late 1980s, strictly "ideological" discussions were impossible, if only because the Soviet system still persisted. Similarly, there could be no discussions regarding specific political decisions stemming from group interests, due to the absence of clear social polarization. Therefore, the language of political discourse at the time was predominantly quasi-historical rather than ideological. Debates centered on the assessment of various historical stages, particularly Stalinism. Formally, these were disputes within historical science, but in reality, they were conducted not through the lens of facts and balanced interpretation, but through mythological symbols such as "collectivization," "terror," and the "cult of personality."

In this debate, two symbolic positions immediately emerged, from which two camps later crystallized: the democrats and the national-patriots. Political propaganda was built upon mutually exclusive historical myths antitheses to official propaganda and the struggle in the sphere of ideas was no longer conducted underground, but officially, using the language of deconstruction, demythologization, and alternative mythologization (Spillman 2014; Elgenius 2011).

Among such ideological frameworks, one can count the attitude of certain Armenian dissidents toward the fact of Armenia's incorporation into the USSR. For decades, Communist propaganda presented this historical event as the salvation of the Armenian people from the inevitable new encroachments of Kemalist Türkiye. The reality of the Bolshevik-Kemalist collusion regarding the Sovietization of Armenia was suppressed in every possible way, while the role and significance of the First Republic of Armenia in Armenian history were diminished.

These and other issues were frequently criticized by many free-thinkers. The lack of objective coverage of historical events connected to the heroic and dignified past of the Armenian people was compensated for by the process of Armenian national awakening, which ran parallel to the decay of totalitarianism. It was the national idea that formed the basis for the activities of nearly all underground organizations operating in Armenia (Koroleva and Molkin 2014). These included the "United National Party" (active since the late 1960s), the "Union for National Self-Determination," and many other circles and associations (Manukyan 2022), whose programs reflected almost all the problems concerning Armenians. Naturally, at the first opportunity for free expression and the unfolding of ideological discourse in Armenia, the national idea was destined to become the predominant force in Armenian public life.

The role of Communist propaganda should be specially noted as a prerequisite for Soviet citizens' perception of the ideological basis of democratic and national-liberation processes. The propaganda of Communist ideas was one of the most vital functions of the former Soviet state. From an early age, citizens of all republics of the former USSR were introduced to the core tenets of Communist ideology and received a

political education regardless of their position in the social structure. In this context, it is important to note the commonality of many liberal-democratic principles with the socialist theory prevalent in society. After all, the founders of Communist ideology did not fundamentally reject liberal slogans. On the contrary, they openly sought to implement many of the ideological principles conceived by liberals. Communism emerged as an antithesis to liberalism and, in many ways, mirrored it. A close genetic link exists between these two ideologies. It was precisely this commonality between the two historically established ideological systems that created the fertile ground in the minds of former Soviet citizens, making them receptive to fundamental changes in society.

Many generations of Soviet people were raised on the ideological principles of humanism and solidarity between nations, goodness and morality, popular sovereignty, and justice. Regardless of the actual policies pursued by the Communist Party, these values were preached by it and formed the ideological framework of the entire Communist ideology. Decades of socialist propaganda significantly increased the level of political literacy among Soviet citizens and created a large mass of actively thinking people. The citizens of the USSR and Soviet Armenia were familiar with such democratic concepts as the right of nations to self-determination, freedom of speech and religion, the formation of governing bodies through free elections, the accountability of elected representatives to the people, and others.

In the everyday consciousness of the Soviet and post-Soviet periods, there is a latent universal value-idea: the idea of labor as the provider of well-being. The recognition of the value of labor is not necessarily linked to egalitarianism. For example, between 1989 and 1991, distributive orientations were characterized as follows: first place was held by the "opportunity to realize one's abilities," and second place by the "dependence of well-being solely on labor contribution," the results of which are in demand by society (Aganbegyan 1988). This everyday perception of the value of labor and earned prosperity closely aligns with the idea of entrepreneurship based on private property within a functioning market economy featuring diverse types of labor activity.

Another aspect involves the abstract notions of "socialist legality" and "socialist law" that had settled in the collective consciousness (Barrett 2021; Lukina 2021; Pomeranz 2021). During the years of "Perestroika", these were overlaid with equally abstract liberal interpretations of law and legality. The result of this superposition was the rejection of the Communist power hierarchy as illegal viewed as a force that had usurped the rights of the majority and secretly redistributed the country's wealth in its own interests. Thus, the slogan of fighting the "privileges of the party nomenclature" became one of the most popular under M.S. Gorbachev. Originally a slogan intended to "purify" socialism and bring it in line with its original ideals, it was gradually turned against the system itself (McNair 2006). By eliminating social division and instilling universal principles of law and legality in the mass consciousness albeit in a truncated Soviet-socialist interpretation the socialist state prepared its own downfall by placing itself outside the scope of those very principles.

In essence, Soviet citizens were ideologically capable of initiating national and liberal-democratic transformations in their republics and seeing them through to their

logical conclusion. It was Soviet citizens who carried out a real revolution in Armenia in 1988, directing the Armenian people to a national liberation struggle for freedom and independence. They were undoubtedly aided by the "political tempering" and "political savvy" formed during the Soviet era. These qualities helped the citizens of Soviet Armenia apply civilized, democratic forms of struggle for power, demonstrate political restraint and awareness in organizing unprecedented mass movements, and utilize all existing political institutions of the socialist state to achieve their goals.

In short, Soviet citizens, being ideologically prepared, were distinguished by a deep understanding of political processes and the essence of the current political situation. Moreover, this same trait was inherent in many political leaders of the upper and middle tiers, which, combined with the mood of the masses, ultimately made it possible to avoid riots, deep social upheavals, and other cataclysms in the country.

Thus, socialist ideology, with its own understanding of democratic principles, prepared the citizens of the former Soviet republics to understand the Western interpretation of a democratic political regime. Meanwhile, the actual policies carried out by the Communist Party which largely ran contrary to the preached principles only hastened the end of the Soviet system. The sense of liberation and free-thinking that struggled so hard to emerge was, one way or another, primarily directed toward the dismantling of the old System and the construction of a new one (Palacios Cuéllar 2024).

Mental characteristics of the Armenian nation in the process of democratic construction

At present, Armenian society like many countries undergoing a transition to democracy is increasingly faced with the problem of defining the ideological vector of its social development (Avdaliani 2022). Directing this vital factor toward the establishment of constructivism, social consolidation, and the strengthening of statehood can be considered one of the priority tasks facing Armenia today.

In this regard, the prevailing mentality in Armenian society acquires particular relevance. It becomes an important prerequisite for the positive perception of democratic transformations in Armenia. Mentality, as a collective-personal construct, represents that layer of social and individual consciousness that exhibits resistance to spiritual values, deep-seated axiological attitudes, skills, latent habits, and long-term stereotypes that form the basis of behavior, lifestyle, and the conscious perception of reality (Hermanto and Zuroff 2016; Tulenkov et al. 2021). Mentality lies at the foundation of rationally constructed and logically interpreted concepts, theories, and ideological systems. Examining the mental characteristics of a social group allows one to penetrate the "hidden" layer of public consciousness that more objectively reproduces the spirit of an era (Bieńkowska and Sikorski 2024). It reveals a slice of reality images, representations, perceptions hidden behind ideology, which in most cases remains unchanged even when one dominant ideology is replaced by another (Travers 1995).

In the political sphere, mentality is linked to experience and daily life. It includes perceptions of political reality, value-based political orientations (both conscious and unconscious), political attitudes, and spontaneous predispositions to react in a specific

way to political situations, processes, and the functioning of political institutions (Schmitt 1996).

The Armenian mentality possesses traits inherent to socialist, liberal, and conservative value systems alike. Take, for instance, the traits of Armenian national psychology recognized by many other nationalities: initiative, resourcefulness, entrepreneurship, the desire to change one's immediate environment in accordance with one's aspirations, and the ability to adapt to the existing environment. According to the Armenian sociologist G. Poghosyan, this complex of characteristics constitutes the content of so-called "Armenian resilience" (Poghosyan 2003). On one hand, there is a pronounced individualism and a personal interpretation of current events; on the other, there is devotion to family and friends, a sense of responsibility for one's social group, and a desire to subordinate private interests to common group interests. This circumstance is largely explained by the fact that individualism has historically taken root in the political consciousness of Armenians, helping many of them survive under the conditions of exploitation by foreign invaders.

Naturally, these traits bring the Armenian mentality closer to the liberal value system. However, this cannot be termed the germ of liberal individualism in its classical sense. Rather, it is a "collective individualism" centered on the primary unit of society the family and the extended kin group associated with it. Ultimately, all efforts of family members were directed toward creating sustainable living conditions for this unit. Manifestations of individualism were linked, first and foremost, to the resilience of a small collective: the family and the kin. The institution of blood-kinship ties acquired great significance in organizing the internal life of the Armenian people due to the geographical fragmentation of the territory, the lack of a unified economic and political space, and the small ethnic population size.

To this, one may add that for centuries, the primary form of Armenian life was the peasant commune. It represented a typical Eastern commune, similar in many ways to the Russian "obshchina". However, while the Russian village featured a dual social structure of "family--commune" where the commune's authority outweighed that of the family, the Armenian structure differed. According to S. Lurye, for Armenians, the authority of the family was more significant than for Russians, and a blood-kinship group ("azg" in Armenian) stood between the family and the commune. This drew the Armenian commune closer to those of other peoples of the Near and Middle East (Lurye 1997). Throughout a long historical period under foreign rule, all Armenian efforts were directed toward preserving the family and the ancestral lineage as a whole. Generally speaking, the cult of the family remains a priority in the Armenian mentality. The years of Soviet power not only failed to eliminate this psychological makeup but reinforced the family ideal, recognizing its role in the development of society.

Modern development is impossible without the image of a free citizen one capable of becoming an actor in the political process and reasonably balancing freedom with responsibility (Doğan 2022). The "will without responsibility" a characteristic trait historically noted in Armenia is receding into the past, giving way to legal consciousness. An active, creative personality is a necessary condition for political development: an individual for whom the striving for freedom and liberation is accompanied by an increase in the efficiency and accountability of political power.

Ultimately, this allows for the creation of a state capable of providing people the freedom to develop their abilities and potential (Harutyunyan 2017).

In Armenia, interpretations of liberalism differ from the standard approaches found in the West. Discussing the liberal orientations of citizens, some political scientists argue that these orientations are based not on "objective" economic factors, but on spiritual and cultural ones; they suggest that the prospect of establishing a liberal-democratic order in Armenia cannot be linked solely to the development of a property-owning class. Nevertheless, many researchers believe that "socio-liberal" and "economically-liberal" trends have become a reality in mass political consciousness and play a definite political role.

Sociological research on the problems of liberal values in the mass political consciousness of Armenians indicates that a significant portion of the population holds a strongly positive attitude toward many of them. These include commitment to the principles of religious, ideological, and political tolerance, the intrinsic value of human life, the obligatory fulfillment of laws, the inviolability of property, defining the strength of the state through the welfare of its citizens, respect for human rights and freedoms, protection of personal honor and dignity, and the need for freedom (Ghulyan 2021). Sometimes, Armenian citizens perceive the primary tasks facing society to be precisely the problems of creating a competitive economy, ensuring individual freedom and equality, separating the functions of the branches of power, and many other issues related to the socio-economic and political development of Armenia.

It should also be noted that liberal values are interpreted quite differently by various groups of Armenian society. There has been and remains a consensus in society regarding liberal ideas, but there is no unity in their interpretation. The real divide occurs not in relation to different understandings of freedom and human rights, but in relation to the practical activities of various political forces when they are in power. People are concerned not with the type of state, but with the character of its relationship with society and the individual. The modern citizen of Armenia wants to live in a country where the state is sufficiently strong and authoritative due to the prosperity of its citizens, rather than in spite of it.

The historical past of Armenians is rich with attempts to radically change the fate of the people. Therefore, the radicalism that occasionally "slips" into the Armenian mentality brings it closer to the essentially revolutionary value systems of liberalism and socialism (Iskandaryan 2018). However, one must also consider the fact that practically all attempts to solve the problem of creating one's own state by force failed for hundreds of years (Melkonyan 1993). In the national mentality of Armenians, a desire to ease one's fate within the existing frameworks of foreign rule and not to go head-on against the superior forces of the enemy which threatened to result in even greater hardships for the people began to prevail.

The need for the radical implementation of democratic and liberal values in Armenian society manifested at the turn of the 1980s--1990s specifically as a result of the "Perestroika" policy conducted in the USSR. During this period, democracy was viewed by Armenian citizens primarily as a means for the implementation of one of its fundamental principles the right of nations to self-determination (Rindlisbacher 2024).

Subsequently, the popular wave raised by the Armenian National Movement (ANM) was directed at breaking the old Soviet management mechanism (Astourian 2000–2001). During this time, the formation and subsequent institutionalization of a number of democratic values took place. These are, first and foremost, those elements of democracy that did not exist before and which developed in post-Soviet Armenia: the real electability of state power bodies, freedom of speech and the press, freedom of movement (including freedom to travel abroad), freedom of entrepreneurship, and others.

At the same time, a significant portion of Armenian citizens across various age groups is, to one degree or another, a supporter of a "strong hand" regime. This attitude toward power structures was developed over years during the Soviet era (Martyniuk et al. 2025) and can be categorized as an element "introduced" into the political mentality of the Armenian people from the outside (Ohanyan 2021). Although, on the other hand, history is replete with instances of "kind" and "sensitive" treatment by many foreign rulers toward the needs of the Armenian people, which instilled in their consciousness a belief in the existence of an enlightened authority. Therefore, by the aforementioned regime, Armenians do not mean an authoritarian regime in the sense generally accepted in political science, but rather the authoritarian regulation of social relations and the protection of the individual from tyranny and lawlessness while maintaining political freedoms. At the same time, the potential support by a significant portion of citizens for a "strong hand regime" is a very dangerous symptom, which could be followed by real support for a political movement or a political party directly oriented toward the establishment of such a strict regime.

There is a certain image of state power present in the Armenian political mentality. The people do not so much entrust the authorities with the performance of specific functions as they hand over their destiny to them. On this basis, paternalism has established itself as a value and a basic orientation in the Armenian political mentality. However, this is a paternalism with a national-patriotic component, aimed at unifying the entire nation around a state that is devoted to it and cares for it. State guardianship is viewed as a "blessing" and an obligation of the authorities to society (the people). At the same time, by engendering dependency mindsets in society and accustoming it to passive waiting, paternalism weakens the independent energy of private individuals. As an ideal of state power, the Armenian political mentality sanctions, first and foremost, a power that is individual (accountable) and fair (moral). This "image" of power is oriented toward a moderate authoritarian ideal, which is always combined with a collective democratism of an ochlocratic nature (Paturyan 2021).

Because of this, a dual attitude toward authority has formed in the political mentality. On one hand, there is a belief in authority, often endowed with charismatic traits, and a corresponding expectation of a "miracle" from it, accompanied by a constant readiness to submit to authority. On the other hand, there is the conviction that authority itself must serve the "common cause" and the national-state idea. Today, the prevailing idea is the establishment of equality and social justice within Armenian society. Hence the striving of the political mentality to ensure control over the activities of power by constantly correlating it with the "common cause."

Connected to this is another characteristic trait of the Armenian political mentality the identification of the state with a large family. From this essentially Confucian idea stems an understanding of national unity as spiritual kinship, as well as a desire to replace soulless legal norms with moral values and ethical standards. From this perspective, the nature of the relationship between the state and the individual in Armenia unlike, for instance, in Western societies is determined not so much by an agreement between subjects and state power to comply with laws, but by a silent "collusion" regarding impunity when they are violated (Sarvazyan 2023).

A characteristic of the Armenian political mentality is a distrust of "alien" state structures, whose words very often diverged from their deeds. Moreover, this distrust also manifested toward representatives of their own ethnos who had "merged" with this foreign state and, together with it, became an unbearable burden for Armenians. In the eyes of the common population, representatives of this stratum of the Armenian community very often appeared as "traitors" and "bloodsuckers" for whom power was a means to oppress their own people. This explains the ambiguous attitude of citizens in modern Armenia not only toward the bureaucratic-official apparatus as a whole but also toward certain representatives of state power.

In general, on one hand, the mentality of the Armenian people is fundamentally oriented toward liberal values. The qualities corresponding to them helped the Armenian people to coexist successfully in situations tragic for their statehood. On the other hand, the problem of preserving national identity was solved mainly through the preservation of centuries-old traditions, way of life, and moral-ethical values passed from generation to generation, which brought the Armenian mentality closer to a conservative value system. What we see is a historically unique and distinctive synthesis at the level of national mentality of the principles of two competing ideological systems, conservatism and liberalism where a balanced and progressive development of the life of the Armenian people becomes possible. Therefore, in practical politics and ideological-political activity, success will accompany those forces that manage to harmoniously combine liberal and conservative principles in furthering the processes of democratization of Armenian society.

Conclusion and discussion

Thus, the socio-political and ideological-mental prerequisites for the positive perception of the liberal-democratic value system by Armenian citizens originated within the depths of the former Soviet society. This process unfolded in parallel with the Soviet leadership's gradual abandonment of totalitarian-dictatorial methods of exercising power and the search for effective economic management. Such a pursuit inevitably led to the necessity of observing elementary economic laws, which entered into serious contradiction with the dogmas of the dominant ideology. Consequently, an inconspicuous dismantling of the existing economic order took place.

Conditions were gradually created for the manifestation of creative and entrepreneurial activity and individual freedom, albeit in a highly truncated form. However, alongside the fairly high level of political consciousness and literacy among citizens, these circumstances created the necessary prerequisites for democratic transformations. Among the socio-political prerequisites, one should note the

emergence of a limited opportunity for Soviet citizens to have a private life, and their drive to earn the means for a prosperous life and to achieve the standard of living of industrially developed countries.

Through the extensive ideological and propaganda work carried out by Party bodies in the USSR and considering the genetic similarity between socialist and liberal approaches to social progress the consciousness of Soviet citizens received significant nourishment for the conceptual perception of the principles of coexistence in a democratic society. This explains the inspiration with which former citizens of the unified state, following its collapse, began to build the national states of their dreams with enthusiasm and knowledge of the fundamental principles of democratic functioning.

Many representatives of political science consider the existence of a certain level of development in a nation's mentality to be one of the main prerequisites for a successful democratic transit. Due to specific historical circumstances over the centuries, the Armenian people have been oriented toward the manifestation of individualism, creativity, initiative, and entrepreneurship in order to secure the necessary and sufficient conditions for their survival. The manifestation of individualism among representatives of the Armenian nation was only further strengthened within Soviet society. However, it must be remembered that conservative traits are also inherent to the Armenian mentality. It is precisely through these traits that the Armenian nation succeeded in preserving its uniqueness, spirituality, and identity under the dominance of other cultures. This combination of seemingly contradictory components (individualism and collectivism) forms the uniqueness of the Armenian mentality, which organically unites them in the aspiration to create a developed and strong democratic national state.

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Ethics Statement

The authors affirm that this research was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The authors declare no conflict of interest.

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BRIDGING SUSTAINABLE DEVELOPMENT AND GOOD GOVERNANCE ISSUES IN ARMENIA: OBSERVATIONS ON THE INTERRELATIONSHIP OF DOMESTIC AND INTERNATIONAL MEASUREMENTS

NARINE ASRYAN* 
Yerevan State University

Abstract

This article analyzes the challenges of achieving the Sustainable Development Goals and good governance in Armenia, based on international assessments. In this regard, the interdependent nature of sustainable development, economic prosperity, social justice, the environment and other factors and their significant impact on domestic viability and global progress are considered. The article examines the interdependence of good governance mechanisms and sustainable development outcomes, as well as the importance of policy coherence and stakeholder engagement. In this context, Armenia's public administration system needs to strengthen its resilience in order to effectively achieve its sustainable development goals. In this context, the relevance of the study stems from the growing importance of the interconnectedness between sustainable development mechanisms and good governance in Armenia. It involves a comparative analysis of the interdependence between the internal and external dimensions of environmental, economic, climatic, and social factors as they shape governance processes within Armenia's local, national, and international agendas. Beyond the integration of environmental and social development issues into the vast majority of the Armenian government's policy documents, sustainable development has become a feature of key sectors, including construction, the energy industry, manufacturing, and the financial sector. Sustainable development extends beyond the realms of scientific and technical innovation and the political-strategic discourse within Armenian society.

Keywords: *good governance, sustainable development goals, governance indicators, stakeholder participation, institutional reforms.*

Introduction

The sustainable development with its triple bottom line of economic prosperity, social equity and environmental integrity, needs strong governance structures to foster its realization. Good governance key principles, like transparency, accountability,

* Narine Asryan is a PhD in Political Science of Chair of Public Administration of the Faculty of International Relations at Yerevan State University. Email: narine.asryan@ysu.am. Orcid: <https://orcid.org/0000-0003-0589-8174>.



participation, and the rule of law, serve as drivers for achieving sustainable development goals (SDGs). This study explores the close relationship between sustainable development and good governance, acknowledging their interdependent nature and significant impact on global progress. It investigates how good governance enhances sustainable development outcomes in different fields and at various levels. Moreover, it examines the challenges and prospects of aligning SDGs with governance frameworks, emphasizing the importance of policy coherence and stakeholder engagement.

This paper investigates the dynamic interplay between sustainable development and good governance, using insights from global practices but situating them in specific Armenian realities. With its multidimensional goals of economic progress, social equity, and environmental protection, sustainable development requires robust government systems that can address complex challenges and foster inclusive growth. Furthermore, the study examines the challenges and opportunities encountered in integrating sustainable development imperatives with governance frameworks in Armenia, taking into account socio-political dynamics and institutional capacities. Drawing from worldwide experiences, the paper offers insights into how Armenia can strengthen its governance systems to advance sustainable development goals effectively. Additionally, it emphasizes the importance of policy coherence and institutional reforms in realizing Armenia's sustainable development aspirations. Ultimately, the findings underscore the significance of aligning governance practices with SDGs to foster inclusive, resilient, and equitable socio-economic progress in Armenia and beyond.

Theoretical Foundations of Sustainable Development and Good Governance

Continuity of global socio-economic development, based on rationalistic and utilitarian perceptions, has led to a serious regression of the natural, social and even spiritual environments of the global community. The serious environmental problems of the late 20th and early 21st centuries, climate change, biodiversity loss, socio-economic and gender inequality are just a few of the systemic crises and challenges faced by all of humanity, especially Generation Z of the 2000s, and couldn't remain indifferent to them: all this has led to the need to review and rethink the world's global view of development and sustainability as guarantees to create a better future and environment for the world (Wright et al. 2025).

Humanity has the capacity to make development sustainable, and in this sense it does not imply a certain static phenomenon: sustainable development is a multidimensional process and shouldn't focus on meeting short-term needs and demands, but on creating long-term perspectives and sustainable solutions of global interest. Moreover, as stated in the 1987 Brundtland Report, where we can say that the official definition of the term "sustainable development" was given for the first time, sustainable development is the form of development that meets the needs of the present without compromising the ability of future generations to meet their own needs (UN Secretary-General, and World Commission on Environment and Development 1987).

Sustainable Development: Concept and Evolution

Discussions about the relationship between the terms “sustainable development” and “good governance” and their conceptual approaches belong to the not-so-recent past: despite this, humanity has not yet arrived at the formation of a single, scientifically based development strategy. The main question is whether good governance leads to ensuring the functioning of all three components of sustainable development: economic, social and environmental, or whether global challenges and the concept of sustainable development aimed at overcoming them pose a challenge to states to modernize their governance systems and implement institutional and operational reforms.

The concept of sustainable development has come a long way, starting from the 1972 UN conference in Stockholm and the establishment of the United Nations Development Program (UNDP) to the 1992 Rio de Janeiro “Declaration on Environment and Development” (Rio Declaration) and the adoption of the “21st Century Agenda” (United Nations 1992), then in 2000 the New York Millennium Report, the 2012 “Rio+20” Summit and, as a result, the adoption of 17 Sustainable Development Goals to be achieved by 2015 (Kaur, Verma, Kumra et al. 2026). In 2015, UN member states started the negotiation process on what sustainable development should look like beyond 2015: the result of which was the adoption of the UN 2030 “Sustainable Development Agenda” and the definition of 169 unique targets and around 232 evaluation indicators (Kaur, Verma, Kumra et al. 2026; Khan, Ashiq, Qadri et al. 2025).

Defining Good Governance: International Perspectives

It is worth discussing the definitions put forward for the term “good governance” by some of the internationally authoritative organizations. Thus, the UNDP defines good governance as a process in which institutions of public authority operate in a transparent, accountable, fair manner, best responding to people’s needs (United Nations ESCAP 2009; UNDP 2011; United Nations 2015).

In 1992, the World Bank defined “good governance” in its “Governance and Development” report as an essential complement to sound economic policy, central to creating and maintaining an environment that fosters strong and equitable development; this mode of governance implies public sector management capacity and efficiency, transparency and accountability (Ginther and de Waart 1995; Best 2014).

The Organization for Economic Co-operation and Development (OECD) views good governance as the process by which public institutions carry out public affairs, manage public resources and guarantee the realization of human rights (Agere 2000).

As it becomes clear from the above definitions, good governance is associated with justice, transparency, accountability and development: it is at the point of implementation of these principles that the concept of good governance intersects with sustainable development in its ideological sense (Onofrei, Oprea and Cigu. 2025).

The Interrelationship between Sustainable Development and Good Governance

The relationship between good governance and sustainable development is dynamic and interdependent. Good governance provides the necessary structures and processes to support sustainable development, while sustainable development influences and refines governance practices. By promoting transparency, accountability and inclusive participation, good governance can guide efforts towards a sustainable future, ensuring that economic growth, social equity and environmental protection coexist (Hamzah, Sulaiman and Ismail 2026; Luykx and Burchi 2025).

The concept of sustainable development is a new model of civilizational development, which stems from the need to achieve a balance between the economic, social and environmental components of society. On the other hand, the term “governance” refers to the exercise of administrative and political leadership at all levels of state power. It includes mechanisms, institutions and processes with the help of which citizens of a given state express their interests, exercise their legal rights, fulfill their obligations and regulate problematic situations. In this context, it is necessary to specifically refer to democratic governance as the possibility of creating a flexible, inclusive and responsive political environment (Mišić, van Est and Kool 2025).

There is no doubt that establishing a proper relationship between good governance and sustainable development will lead to the creation of a more prosperous, just and secure living environment for states and societies and will help demonstrate a systematic, equitable and practical approach to achieving the goals of sustainability. Thus, good governance creates the frameworks and mechanisms necessary to achieve the SDGs, while the SDGs can in turn promote and shape the principles of good governance. In other words, it can be assumed that the relationship between good governance and sustainable development is integrative, taking into account the interdependence of economic, social and environmental factors and the need for effective institutions and formal procedures to ensure the latter (El-Sheikh, El-Kholei and El-Buhairi 2026).

Key Principles of Good Governance for Sustainable Development and the Reciprocal Influence of Sustainability on Governance Practices

What basis does good governance provide for implementing the fundamental principles of the concept of sustainable development, and what does it mean to promote good governance for sustainable development? Much discussion of good governance has focused on the question of what makes institutions more workable and purposeful in achieving fairness, transparency, participation, responsiveness, accountability and the rule of law (Kotai and Soni 2026; Aleksanyan and Aleksanyan 2024).

Transparency and accountability. Good governance emphasizes transparency and accountability, ensuring efficient and responsible consumption of public resources. On the other hand, transparency contributes to the formation of an atmosphere of trust within society.

Rule of law. The rule of law ensures the fair and consistent implementation of public policy. A fair legal framework supports sustainable development by providing a

stable environment for long-term investment in areas such as infrastructure, education, and environmental protection.

Participation. Good governance involves the participation of various stakeholders, including the state, the business community, the non-profit (third) sector and civil society. Involving this range of stakeholders in decision-making processes ensures that public policies reflect diverse perspectives and needs, leading to more inclusive and sustainable outcomes.

Responsiveness. Good governance is characterized by responsiveness to the needs and concerns of the population. By being adaptive and resilient, governments can address emerging challenges to sustainable development, such as climate change, resource depletion and social inequalities.

Strategic vision and planning. Long-term planning and strategic vision are integral to good governance. This foresight allows states to develop policies that are consistent with the SDGs such as reducing carbon emissions, promoting renewable energy, and ensuring equitable access to resources.

From the points listed, it can be concluded that the collaboration of sustainable development and good governance forms a solid framework of relationships that promises a balanced, inclusive and prosperous future for all stakeholders. All stakeholders have a key role in shaping the sustainability agenda, bringing cutting-edge perspectives, innovative and creative ideas and a deep commitment to the idea of sustainability.

How does sustainable development shape governance practices in turn?

Environmental protection. Sustainable development emphasizes the need to conserve natural resources. This trend is forcing states and their governance systems to adopt environmental regulations, promote sustainable resource consumption practices, and invest in green technologies.

Social equality. A main principle of sustainable development is social integration and justice. Governance structures that prioritize social justice and equal opportunities contribute to the reduction of developmental disparities and the development of a more cohesive society, which is essential for sustainable development.

Economic stability and vitality. Sustainable development seeks to create economic systems that are resilient and capable of sustaining long-term prosperity. Good governance supports this by ensuring well-designed economic policies and promoting innovation and entrepreneurship.

Integration of policies. Sustainable development requires the integration of economic, social and environmental policies. Good governance facilitates this integration by promoting cross-sectoral coordination and aligning policies between different levels of government.

Global cooperation. Solving global challenges such as climate change, biodiversity loss, poverty and social justice issues requires international cooperation. Good governance in this sense helps interpret international frameworks and agreements aimed at addressing global challenges. Good governance at the global level involves pooling efforts and cooperation, adherence to international agreements, sharing best practices and demonstrating a single, integrated approach to sustainable development,

all of which are essential to achieving the Sustainable Development Goals (Al Azizah and Haron 2025).

Multi-Stakeholder Approach to Sustainable Development

Good governance towards ensuring sustainable development is a process aimed at achieving a certain level of inclusive and fair socio-economic development, environmental sustainability, peace and security. On the other hand, governmental relationships in the modern world are becoming more complex and multi-faceted. If in the past states were able to make decisions without taking into account the foreign political agenda, now all stakeholders cannot remain unconnected to the mentioned process: local, national, regional and supranational structures, the business community, the non-profit sector, etc.

Thus, supranational structures, in the form of international organizations, have the role of initiator and supervisor in these processes. They must be able to monitor the progress being made towards ensuring the basic principles of sustainable development through good governance. As for local, national and regional authorities, they are required to implement the initiatives of international organizations, making the idea of sustainable development accessible to society. In real interaction with society, they can ensure the rule of law, create and deliver public goods, and generally implement transnational policies for sustainable development at the local and national levels.

As for the business community, it should be noted that it should occupy a leading role in the transition to sustainable development. Business corporations not only possess a huge amount of resources (financial, informational, human, etc.) and are considered major actors, but also play an important role in the development of the international financial and economic system, the establishment of the global economic world order, and technological progress.

Moreover, the role of the business sector is not limited to the above: currently, the practice of public-private partnership is being successfully implemented all over the world, and in this context it can be considered one of the most important directions of sustainable development. In conditions of free competition and state regulation of the economy, the state feels the need for the support of the private sector more than ever in implementing a number of policy programs. Thus, the public-private partnership model can be considered a mechanism for involving the private sector in the process of providing public services, as well as a tool for state regulation of the economy, ensuring the encouragement of initiative and innovation and attracting investments in infrastructure and social sectors.

Turning to the other important non-state, non-profit sector of actors, it should be noted that they play a so-called “catalyst” role, overcoming the boundaries of national legislation and drawing the attention of the modern multipolar world and the global community to current challenges, the importance of global cooperation, and, as a result, the need to develop a single formula for ensuring sustainable development (Bedoya et al. 2025; Post and Melis 1978).

Finally, it is necessary to address the role of civil society: it must hold the state and the business sector accountable, mobilize local communities and support the development of social entrepreneurship. This range of stakeholders also includes think

tanks, research institutes and the expert community, which must take on the role of innovators and initiators in ensuring sustainable development.

Good governance plays a crucial role in shaping and implementing the sustainability agenda. Through laws, regulations, procedures, and other policy instruments, governments can promote sustainable practices and behaviors, as well as encourage private and non-public sector investment to ensure the development of sustainable technologies and infrastructure.

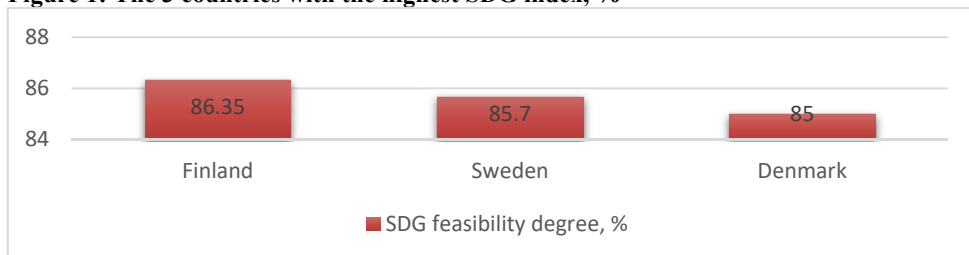
As a result of all this, as well as scientific and technical progress and the information and communication revolution, good governance in relation to sustainable development is gradually becoming more transparent, accountable and controllable, also implemented with the help of such mechanisms as public-private partnership, international cooperative relations, and the institution of corporate social responsibility.

Thus, all the above-mentioned actors must interact, forming an effective and multifaceted partnership model, transferring the leadership role in the model's implementation to each other as needed. The interconnectedness of the issues and the demonstration of a coordinated approach to them by all actors, and the increase in the participation of civil society and other interested parties, are especially important here. In other words, sustainable development can be achieved only thanks to a multipolar approach, in which international structures, state institutions, and business-sector policies each play a part (a vivid example of the latter is the application of the ESG (Environmental, Social, Governance) approach, combining environmental protection, social problems and governance issues) (Khamisu, Paluri and Sonwaney 2024; Corporate Governance Center Armenia 2021).

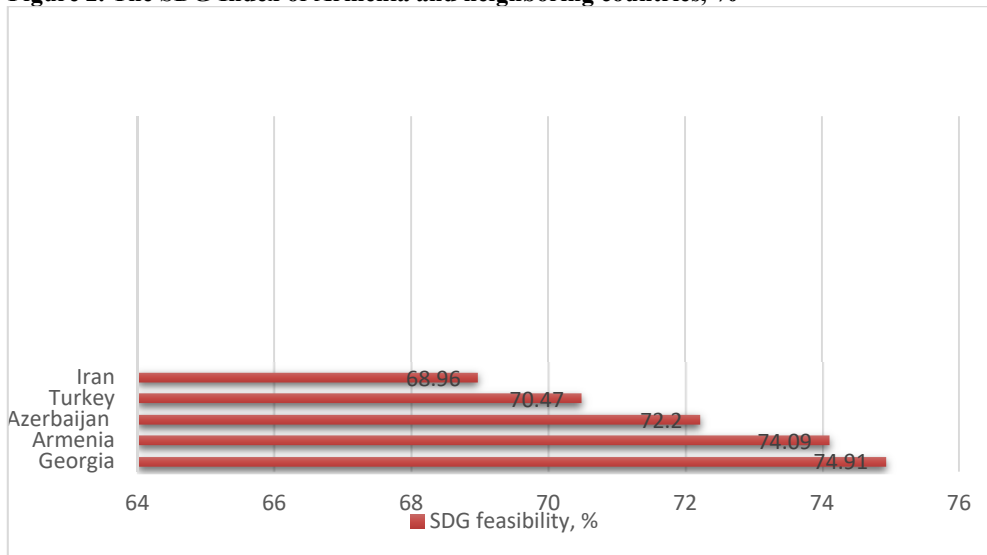
Measuring Sustainable Development and Good Governance

Referring to the issue of quantitative assessment of sustainable development, the effectiveness of actions aimed at the implementation of the SDGs is clearly visible in the 2024 UN Sustainable Development Report, which is evaluated by the SDG Index (Sachs et al. 2024, 20-22). The high point of measurement is 100 percent, which indicates that all SDGs have been achieved. According to the report, Finland, Sweden and Denmark occupy the first three places, with the degree of realization of the SDGs distributed as shown below.

Figure 1. The 3 countries with the highest SDG index, %



Referring to the 2024 SDG Index of Armenia's neighboring countries, we get the following:

Figure 2. The SDG Index of Armenia and neighboring countries, %

As Figure 2 shows, Georgia has the best indicator in the region. As for the places occupied by Armenia and neighboring countries in the ranking, Georgia ranks 43rd, Armenia ranks 49th, Azerbaijan ranks 63rd, Turkey ranks 72nd, and Iran ranks 86th. If we consider the SDG Index of post-Soviet countries in 2024, along with each country's place in the ranking, we obtain the results shown in Table 1.

Table 1. The SDG Index of post-Soviet countries, %

The state	SDG Index, %	Ranking
Armenia	74.09	49
Georgia	74.91	43
Azerbaijan	72.20	63
Russian Federation	73.10	56
Ukraine	74.81	44
Belarus	78.60	30
Moldova	78.81	27
Lithuania	78.10	31
Latvia	80.99	13
Estonia	80.46	15
Kazakhstan	71.11	66
Turkmenistan	67.13	94
Tajikistan	68.04	89
Uzbekistan	69.24	81
Kyrgyz Republic	74.19	48

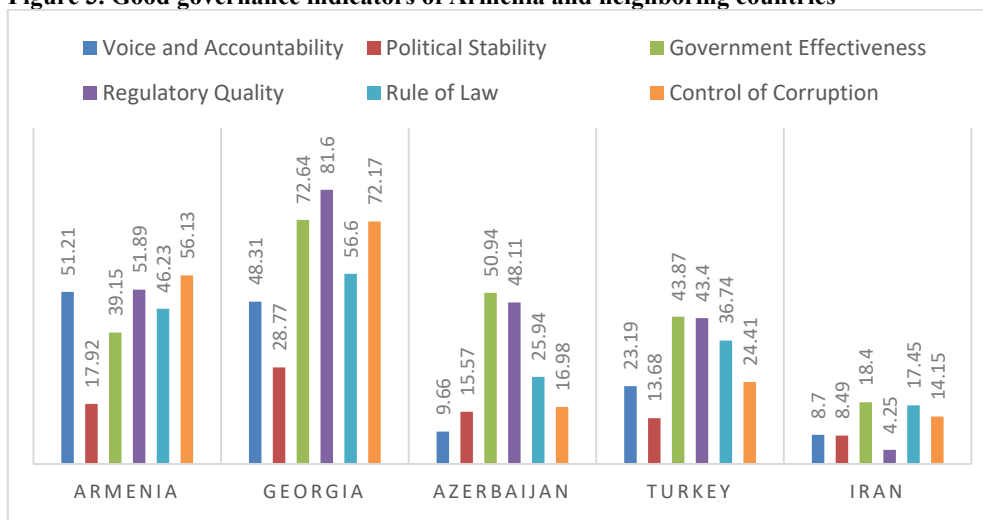
Source: Sachs et al. 2024.

It can be seen from the table that the highest values of the SDG Index belong to the Baltic countries, and the lowest to the countries of Central Asia.

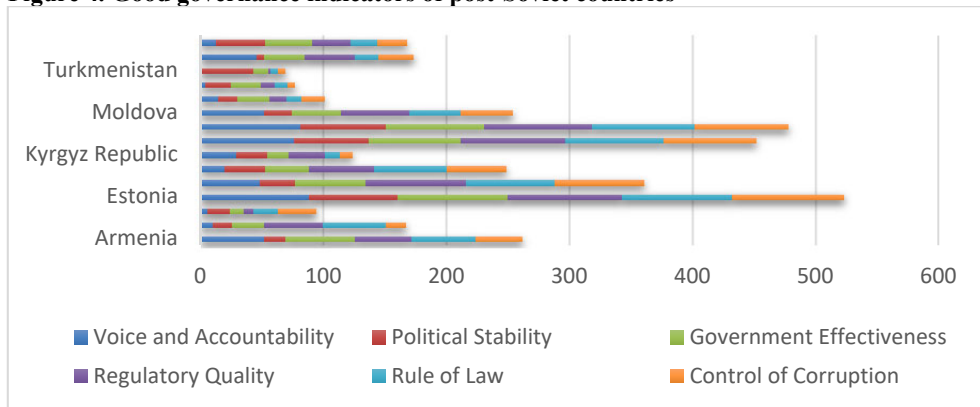
Assessment of Good Governance Indicators

The Worldwide Governance Indicators (WGI) best reflect the relationship between the concepts of “sustainable development” and “effective governance.” Effective governance plays a pivotal role in development (World Bank 2023), helping countries improve economic performance, build human capital, and strengthen social cohesion. The WGI metrics are designed to help assess general perceptions regarding the quality of governance across different countries. Let us examine the governance quality indicators for Armenia and its neighboring countries using Figures 3 and 4.

Figure 3. Good governance indicators of Armenia and neighboring countries



As Figure 3 shows, in terms of most WGI indicators of good governance, Georgia is the regional leader, while the lowest indicators were recorded for Iran. In the case of Armenia, the lowest WGI indicator is political stability. It is also possible to observe the characteristics of good governance indicators for the countries of the post-Soviet area (data as of 2022, the most recent year available at the time of writing) (World Bank 2023).

Figure 4. Good governance indicators of post-Soviet countries

As Figure 4 shows, Estonia is in the leading position among post-Soviet countries across all indicators of good governance, and, in the case of that state, all indicators are almost equally represented. Ukraine has the lowest value of political stability, due to the Russian-Ukrainian war that started in February 2022. The indicators of Belarus, and of the Central Asian countries generally, are also low. If we try to draw parallels between the SDG Index and the WGI, we find that their values are almost proportional, which points to the close mutual connection between sustainable development and good governance.

Global Governance Framework for Sustainable Development

Based on the 2000 UN Millennium Declaration, an applied framework of global governance was outlined, with the following components: peace/security, democracy/rule of law, human rights/participation, and sustainable development/human development. Table 2 presents this framework in more detail (Lewis 2006).

Table 2. Indicators and factors constituting the World Governance Index

Indicator	Sub-indicator	Index
Peace / Security	National Security	Conflicts; Refugees / Asylum Seekers; Displaced Persons
	Public Security	Political climate; Degree of trust; Violent crime; Homicides / inhabitants
Democracy / Rule of Law	Body of Laws	Ratification of International Treaties; Protection of Property Rights
	Legal System	Independence; Effectiveness; Settlement of Contractual Disputes
	Corruption	Corruption Perceptions Index
Human Rights / Participation	Civil and Political Rights	Respect of Civil Rights; Respect of Physical Integrity Rights; Freedom of the Press; Violence against the Press

Indicator	Sub-indicator	Index
Sustainable Development	Participation	Participation in Political Life; Electoral Process and Pluralism; Political Culture
	Discrimination / Gender Inequalities	Women's Political Rights; Women's Social Rights; Women's Economic Rights; Female Parliamentary Rate
	Economic System	GDP per capita; GDP Growth Rate; Inflation Rate; Ease in starting a business
	Social Dimension	Poverty Rate / Inequalities (Gini Coefficient); Unemployment Rate; Ratification of International Labor Law Treaties
	Environmental Dimension	Environmental Sustainability; Environmental Performance Index
Human Development	Development	Human Development
	Well-being / Happiness	Subjective Well-being

Source: Adapted from Lewis 2006.

Sustainable Development and Governance Reforms in Armenia

The framework presented in Table 2 is not merely a classificatory instrument; it constitutes an analytical lens through which the governance performance of individual states can be systematically situated within the broader architecture of sustainable development. By mapping the intersections between peace and security, democratic accountability, human rights, and socio-economic development, the World Governance Index captures the multidimensional nature of the governance-sustainability nexus in a manner that neither the SDG Index nor the WGI alone is capable of expressing. Critically, the framework makes explicit what much of the theoretical literature implies: that sustainable development outcomes are not produced by isolated policy interventions, but by the cumulative functioning of interlocking institutional systems across legal, political, economic, and social dimensions.

It is precisely through this integrated lens that the case of Armenia warrants close examination. As the preceding comparative data demonstrate, Armenia occupies a mid-tier position in both the SDG Index and the WGI rankings — a positioning that reflects neither the institutional stagnation characteristic of Central Asian post-Soviet states nor the consolidated governance maturity of the Baltic republics. Rather, Armenia's indicators suggest a transitional governance profile: one in which meaningful reform momentum coexists with persistent structural vulnerabilities, and in which the gap between stated developmental commitments and measurable institutional outcomes remains a defining policy challenge. Understanding how Armenia has sought to close this gap — and where the most significant constraints remain — requires a chronological examination of the country's institutional engagement with the Sustainable Development Goals over the past decade.

If we present in chronological order the actions taken during the last decade towards the implementation of the concept of sustainable development in Armenia, we obtain the following:

1. 2015: Signing of the United Nations Development Assistance Program (UNDP).
2. March 9, 2015: On the basis of the RA Prime Minister's decision, the National Development Council was created.
3. From 2016: the start of the process of SDG localization, and, in February 2017, the creation of an interdepartmental working group to ensure the process of nationalizing the SDGs.
4. March 7, 2017: The inaugural session of the interdepartmental working group was held. As a result, sectoral subgroups were formed: social, economic, ecological, legal and democratic.
5. 2017: the Armenia National SDG Innovation Lab was established as a joint initiative of the Government of Armenia and the United Nations.
6. July 2018: the new government of RA announced the “Sustainable Development Agenda 2030” and presented its first Voluntary National Review at the UN High-Level Policy Forum on the Agenda and SDG Implementation.
7. April 22, 2020: by decision of the RA Prime Minister, the RA SDG Council was established, revoking the RA Prime Minister’s decision of March 9, 2015.
8. July 2020: the UN published the 2020 SDG Voluntary National Assessment Report of Armenia.
9. 2021: adoption of the “UN Sustainable Development Partnership for Armenia 2021-2025” framework document, and the creation of the Armenia National SDG Innovation Lab, which aims to spread the culture of innovation and experimentation for the sake of sustainable development. It is a joint initiative of the Government of the RA and the United Nations, supported by the United Nations Development Program in the RA. The SDG Innovation Lab aims to identify the development potential of Armenia and accelerate the implementation of “Agenda 2030” (Sustainable Development Goals Lab Armenia 2025).

Already for the 2021–2025 period, in the field of RA state policy, three main priorities have been identified for ensuring and improving the sustainable development of RA: (1) prosperity and capabilities; (2) green, sustainable and inclusive economic development; and (3) responsible and good governance.

Armenia is committed to the implementation of the goals set by "Agenda 2030," and the RA government is making efforts to include the SDGs in RA's sectoral reforms, as well as in nationalization and localization strategies and policy documents. Moreover, the 2014–2025 plan, developed earlier, is currently being implemented. In the perspective development strategic plan, four main priorities were put forward — expansion of employment, development of human capital, improvement of the social protection system, and institutional modernization of the governance system — none of which can be implemented without an understanding and application of the conceptual foundations of good governance and sustainable development.

Thus, the achievement of sustainable development goals requires the joint efforts and concerted actions of all stakeholders: the state and the administrative-political

system, NGOs and civil society, the private sector, local governments and the international community. On the other hand, in order to overcome the obstacles on the way to achieving the goals of sustainable development, gather the necessary resources, and implement policies that promote sustainable development in Armenia and beyond, it is also necessary to have a favorable legal, political and institutional environment, with the help of which — using the dynamic and transformative potential of sustainable development — it will be possible to pave the way to a more vibrant, just and prosperous future for all.

Armenia's SDG Agenda in the Shadow of Post-War Realities: Governance Dimensions of a Fragile Transition

The examination of Armenia's sustainable development trajectory cannot be fully contextualized without a rigorous analysis of the post-war conditions that have fundamentally restructured the country's governance environment and policy priorities. The 44-day Nagorno-Karabakh war of 2020, culminating in the Trilateral Statement of November 9–10, 2020, and the subsequent complete displacement of the ethnic Armenian population from Nagorno-Karabakh following the September 2023 military operation, have introduced a set of acute governance challenges that directly intersect with Armenia's commitments under the 2030 Agenda for Sustainable Development (Trilateral Statement on Nagorno-Karabakh 2020; International Crisis Group 2021). These events must be understood not as peripheral disruptions but as structurally transformative variables that bear directly on the country's institutional capacity, social cohesion, and long-term development sustainability.

The forced displacement of over 100,000 ethnic Armenians from Nagorno-Karabakh in September 2023 constitutes one of the most significant humanitarian and governance crises in Armenia's post-independence history (PACE 2023; UNHCR 2023; Human Rights Watch 2023). From the standpoint of SDG implementation, this demographic shock has placed simultaneous and compounding pressure on at least six of the seventeen Sustainable Development Goals, most critically: SDG 1 (No Poverty), SDG 3 (Good Health and Well-Being), SDG 10 (Reduced Inequalities), SDG 11 (Sustainable Cities and Communities), SDG 16 (Peace, Justice and Strong Institutions), and SDG 17 (Partnerships for the Goals). The state's capacity to absorb and integrate a displaced population of this magnitude within a short timeframe, while simultaneously maintaining macroeconomic stability and pursuing structural governance reforms, represents an extraordinary test of institutional resilience and adaptive governance capacity.

The post-war context has profoundly affected Armenia's WGI profile, most visibly in the dimension of political stability and absence of violence — consistently the lowest-scoring governance indicator for Armenia in the WGI framework (World Bank 2023; Kaufmann, Kraay, and Mastruzzi 2010). The persistence of unresolved border tensions, the reorientation of Armenia's security architecture, and the domestic political polarization generated by the outcomes of the 2020 and 2023 military episodes have created a governance environment in which long-term planning horizons are compressed, institutional attention is diverted from development to security imperatives, and public trust in state institutions remains fragile. These conditions

constitute structural barriers to the realization of the coherent, forward-looking governance posture that effective SDG implementation requires.

From a fiscal governance perspective, the heightened defense spending necessitated by post-war security realities has constrained the budgetary space available for social investment, environmental programming, and institutional capacity-building — all of which are critical enablers of SDG attainment (SIPRI 2024; International Monetary Fund 2023). According to available data, Armenia's defense expenditure as a share of GDP has increased substantially in the post-2020 period, generating trade-offs between security imperatives and developmental spending that present a genuine governance dilemma. The challenge for Armenian public administration is therefore not merely technical but fundamentally political: how to maintain the credibility of the country's SDG commitments under conditions of acute resource scarcity and security pressure, without allowing the sustainability agenda to be displaced by short-term crisis management imperatives.

At the same time, the post-war period has paradoxically generated certain governance opportunities that, if strategically leveraged, could contribute positively to Armenia's sustainable development trajectory. The reorientation of Armenia's foreign policy and partnership framework — most notably, the deepening of engagement with the European Union, including the ongoing discussions on a new partnership agreement and the visa liberalization dialogue — opens channels for enhanced institutional capacity-building, rule-of-law strengthening, and alignment with European governance standards (Martines and Velluti 2026; Juška 2024; The Council of the EU and the European Council 2026; Council of Europe 2023). The EU's conditionality-based partnership model, anchored in principles of democratic governance, transparency, and the rule of law, offers a structured external incentive mechanism that can reinforce Armenia's domestic reform agenda and provide benchmarks coherent with SDG frameworks.

Furthermore, the experience of managing the 2023 forced displacement crisis has, in practice, generated an unprecedented mobilization of civil society, diaspora networks, international humanitarian organizations, and local governmental structures. This multi-stakeholder response — however improvised and resource-strained — embodies in operational terms the very multi-actor governance model that SDG implementation theory prescribes. The challenge for Armenia's governance system is to institutionalize and systematize the coordination mechanisms that emerged from this crisis into durable structures of participatory governance capable of contributing to broader sustainable development objectives. In this sense, the humanitarian crisis of 2023 may serve as a governance laboratory, providing evidence-based lessons for more inclusive, adaptive, and resilient institutional design.

In analytical terms, Armenia's post-war situation exemplifies a category of governance challenge that the standard SDG monitoring framework is insufficiently equipped to capture: the compounded vulnerability of a state pursuing sustainable development under conditions of unresolved territorial conflict, mass displacement, and active geopolitical restructuring. The SDG Index, as currently constituted, does not incorporate composite indicators sensitive to post-conflict or security-transition contexts, which means that Armenia's SDG ranking of 49th globally (2024 SDG Index)

may simultaneously overstate certain structural achievements while understating the depth of governance fragility introduced by post-war conditions (Sachs et al. 2024, 22; Kotai and Soni 2026; Nilsson, Griggs, and Visbeck 2016). This observation points to a methodological gap in the international measurement of sustainable development that merits attention from the academic and policy communities concerned with transitional and conflict-affected states.

In conclusion of this subsection, it must be argued that Armenia's path toward the 2030 Agenda cannot be charted in abstraction from its post-war geopolitical and humanitarian realities. The advancement of SDG targets in the Armenian context demands a governance approach that is simultaneously reformist and resilient: capable of prosecuting long-term structural reforms while absorbing acute security and demographic shocks. This dual imperative — reform and resilience — should constitute the organizing framework for Armenia's national sustainable development strategy in the years ahead, and should be recognized as a defining characteristic of governance in post-conflict transitional states more broadly.

Conclusion and Discussion

The study provides empirical and theoretical grounds for asserting that sustainable development and good governance constitute two structurally interdependent variables within the broader paradigm of national development. The evidence examined throughout this article confirms the hypothesis that governance quality functions as both a determinant and an outcome of sustainable development trajectories, rendering their relationship inherently recursive rather than unidirectional.

The cross-national comparative analysis, grounded in internationally recognized measurement frameworks — including the WGI, the SDG Index, and complementary institutional performance metrics — reveals a statistically consistent pattern: states exhibiting higher scores in institutional effectiveness, rule of law, accountability, and political stability demonstrate measurably superior progress across the three pillars of sustainable development: economic, social, and environmental. The governance experiences of Nordic countries and Baltic post-Soviet states serve as instructive reference cases, illustrating how the consolidation of democratic institutions, policy coherence mechanisms, and participatory governance structures correlates with accelerated SDG attainment.

The case of Armenia occupies a position of particular analytical interest within this comparative framework. The findings indicate that Armenia has undertaken substantive institutional reforms over the past decade, including the formalization of SDG localization processes, the establishment of dedicated coordination bodies, and the elaboration of national strategies aligned with Agenda 2030. These developments signal a meaningful convergence between domestic policy priorities and international normative commitments. However, a critical reading of the available composite indicators reveals persistent structural deficits in areas including political stability, inter-institutional coordination capacity, and the depth of civil society integration into formal decision-making processes — deficits that constitute binding constraints on Armenia's sustainable development trajectory.

The study further identifies the multi-stakeholder governance model as a necessary, rather than optional, feature of effective sustainable development implementation. The complexity and systemic nature of contemporary development challenges — including climate change mitigation and adaptation, digital transformation, demographic restructuring, and compounding socio-economic inequalities — exceed the functional capacity of any single institutional actor. Consequently, the consolidation of public-private partnerships, the institutionalization of civil society consultation mechanisms, and the strengthening of subnational governance structures emerge as operationally critical dimensions of a coherent national development strategy. Of equal significance is the finding that governance systems must undergo structural adaptation in response to an evolving global risk environment. Evidence-based policymaking, the integration of digital governance instruments, and the development of strategic foresight capacities are identified as emerging functional requirements for governance systems operating under conditions of heightened uncertainty and systemic complexity.

In sum, this study concludes that Armenia's progress toward the Sustainable Development Goals is functionally contingent upon the sustained improvement of governance quality across its key institutional dimensions. The empirical and theoretical evidence presented herein supports the position that sustainable development and good governance should be operationalized not as discrete policy domains but as co-constitutive pillars of a unified long-term development strategy. Advancing this integrated framework requires continued investment in democratic institution-building, transparency mechanisms, stakeholder engagement architecture, and adaptive public administration capacities. Future research will examine the causal weight of specific governance variables — particularly digital governance adoption and public sector innovation — on SDG implementation outcomes in Armenia and analogous transitional state contexts.

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Ethics Statement

The author confirms that this study was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The author declares no conflict of interest.

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DETERMINANTS OF LEGISLATIVE LONGEVITY AND SURVIVAL IN THE UNITED STATES CONGRESS: EVIDENCE FROM COX PROPORTIONAL HAZARDS AND WEIBULL SURVIVAL MODELS

OLORUNTOBA OYEDELE* 
Walter Sisulu University

Abstract

This study investigates the determinants of legislative longevity and survival in the United States Congress using survival econometric techniques. Drawing on congressional data from the 46th to the 117th Congress obtained from Voteview, the study examines how ideological positioning, party affiliation, chamber membership, demographic characteristics, and legislative participation influence the duration of congressional service. The analysis employs the Cox Proportional Hazards Model as the primary estimation technique, complemented by a Weibull survival model for robustness testing. The results indicate that ideological extremity significantly increases the probability of congressional exit. Specifically, NOMINATE Dimension 1 increased the hazard of exit by 54.1% (HR = 1.541, $p < 0.01$), while NOMINATE Dimension 2 increased the hazard by 12.4% (HR = 1.124, $p < 0.05$). Senate membership reduced exit risk by approximately 40.2% (HR = 0.598, $p < 0.01$), whereas greater legislative participation and older cohorts were associated with longer congressional survival. Party affiliation was not statistically significant. Marginal-effects estimates reveal that ideological extremity reduces expected congressional tenure by up to 1.84 years, while Senate membership increases expected survival duration by 4.36 years. Robustness checks using the Weibull model confirm the consistency of the findings, and proportional-hazard diagnostics indicate that the Cox model assumptions are satisfied. The study concludes that congressional longevity is primarily shaped by ideological positioning, institutional advantages, accumulated political experience, and legislative engagement rather than partisan affiliation. These findings provide important insights into the dynamics of congressional careers and the broader consequences of political polarization for democratic representation and legislative stability.

Keywords: *Congressional Survival, Legislative Longevity, Political Polarization, Cox Proportional Hazards Model, Congressional Careers, Legislative Turnover.*

* **Oloruntoba Oyedele** holds a PhD in Financial Management and is an academic researcher and faculty member in the Department of Accounting Science of the Faculty of Economic and Financial Sciences at Walter Sisulu University. Email: oyedeleoloruntobar@gmail.com. Orcid: <https://orcid.org/0009-0007-8669-3555>.



Introduction

The United States Congress has long been regarded as one of the most institutionalized legislative bodies in the world, yet substantial variation exists in the duration of service among its members. While some legislators remain in office for decades, others leave after only a few terms. Understanding the factors that influence legislative longevity is important because experienced legislators often accumulate institutional knowledge, policy expertise, and political influence that shape legislative outcomes and governance processes (Hibbing 1991; Brady et al. 1999). Congressional careers are affected by electoral incentives, constituency relations, party dynamics, and personal strategic choices. Existing scholarship has examined congressional careers from perspectives such as incumbency advantage, retirement decisions, and institutional development, but less attention has been given to the duration of legislative survival as a dynamic process that unfolds over time (Stone et al. 2010; Eckman and Wilhelm 2025). Consequently, the determinants of legislative survival remain an important area for empirical investigation.

Research on congressional behavior increasingly highlights the role of ideology and polarization in shaping legislative careers. The growth of ideological divisions between Democrats and Republicans has transformed congressional competition, voting behavior, and policymaking processes (McCarty et al. 2016; Lee 2015). Ideological positioning affects electoral prospects because representatives must balance constituency preferences with party expectations and personal policy commitments (Ansolabehere et al. 2001; Bafumi and Herron 2010). At the same time, the development of spatial models and ideological scaling techniques has enabled scholars to measure legislative ideology more accurately through roll-call voting records (Poole and Rosenthal 1985; Aldrich and McKelvey 1977). Despite these advances, studies have generally focused on ideological behavior and polarization rather than examining whether ideological orientation influences how long legislators remain in Congress. This omission leaves an important gap in understanding congressional career trajectories.

The first objective of this study is to examine the factors associated with legislative survival in Congress. Legislative longevity may be influenced by a combination of personal, institutional, and political characteristics. Previous studies suggest that incumbency advantages, career incentives, constituency support, and accumulated political capital can increase the likelihood of prolonged legislative service (Stone et al. 2010; Claessen 2024). Similarly, congressional career patterns reveal that members who successfully navigate electoral competition and institutional challenges often develop stronger survival prospects over time (Eckman and Wilhelm 2025). However, most existing studies assess these factors using descriptive or cross-sectional approaches. Limited attention has been devoted to evaluating legislative tenure through survival econometric techniques that explicitly account for the timing of exit from Congress. This study addresses this gap by employing a Cox proportional hazards framework to identify the determinants of congressional survival.

The second objective is to determine whether ideology affects congressional longevity. Ideology has become increasingly important in congressional politics as partisan polarization continues to intensify (Theriault 2008; McCarty et al. 2016).

Legislators with ideological positions that diverge significantly from their constituencies may face electoral vulnerabilities, while those closely aligned with voter preferences may enjoy greater political security (Ansolabehere and Jones 2010; Bafumi and Herron 2010). Furthermore, ideological consistency influences relationships with party leaders, interest groups, and campaign donors, all of which can affect reelection prospects. Although ideological measures such as NOMINATE scores have been widely used to analyze voting behavior and polarization, empirical evidence regarding their impact on legislative survival remains limited (Poole and Rosenthal 1985). This study therefore investigates whether ideological positioning systematically influences the hazard of congressional exit.

The third objective is to compare survival probabilities across political parties and legislative chambers. Party affiliation and chamber membership create distinct institutional environments that may affect career longevity. Members of the House of Representatives face more frequent elections and often experience greater electoral volatility than senators, whose longer terms may provide stronger opportunities for career consolidation (Eckman and Wilhelm 2025). Similarly, partisan differences may influence legislative careers through varying electoral coalitions, organizational support, and ideological pressures (Lee 2015; McCarty et al. 2016). Recent research also suggests that institutional factors and partisan dynamics continue to shape congressional behavior and career outcomes in significant ways (Aka and Dzordzormenyoh 2026). Nevertheless, comparative evidence on survival probabilities across parties and chambers remains scarce, particularly within a unified survival-analysis framework.

This study contributes to the congressional literature by integrating insights from legislative career research, ideological representation, and polarization studies within a survival econometric framework. By examining legislative tenure as a time-to-event process, the study provides a more comprehensive understanding of the factors that sustain or shorten congressional careers. In doing so, it fills three important gaps: the limited application of survival models to congressional careers, the insufficient attention given to ideology as a determinant of legislative longevity, and the lack of comparative evidence across parties and chambers. The remainder of the article is organized as follows. The next section reviews the relevant theoretical and empirical literature. This is followed by the methodology and data description. The subsequent section presents and discusses the empirical results, while the final section concludes the study and highlights policy and research implications.

Literature Review

Legislative careers have occupied a central place in political science because they provide insight into how democratic institutions reproduce leadership, allocate political influence, and maintain policy continuity. Early scholarship emphasized the emergence of congressional careerism, arguing that legislators increasingly viewed public office as a long-term profession rather than a temporary civic responsibility (Brady et al. 1999; Hibbing 1991). This transformation encouraged scholars to examine the incentives that motivate legislators to remain in office and the institutional conditions that facilitate lengthy careers. Congressional service offers opportunities for policy specialization,

committee advancement, leadership positions, and electoral advantages, all of which can encourage members to pursue long-term careers. Yet legislative longevity is not uniform. Some representatives and senators remain in office for decades, whereas others depart after a single term. Understanding the determinants of this variation remains an important objective in legislative studies because career duration influences legislative effectiveness, institutional memory, and policy outcomes (Eckman and Wilhelm 2025).

Theoretical explanations of legislative survival often draw from rational-choice perspectives. Downs (1957) argued that political actors make strategic decisions based on expected benefits and costs, a framework that has strongly influenced subsequent studies of legislative careers. Within this tradition, legislators are viewed as strategic actors seeking reelection, influence, and policy achievement. Cox and McCubbins (2007) extended this logic by emphasizing the importance of party institutions in structuring legislative incentives. Political parties provide resources, committee assignments, campaign support, and procedural advantages that can increase the likelihood of career continuity. Conversely, legislators who fail to secure institutional support may face greater risks of electoral defeat or voluntary retirement. These perspectives suggest that legislative survival should be understood as the outcome of both individual decisions and institutional arrangements operating simultaneously within Congress.

Research on legislative turnover provides another important foundation for understanding congressional longevity. Matland and Studlar (2003) examined determinants of legislative turnover across countries and found that electoral systems, political competition, and institutional characteristics significantly shape rates of legislative renewal. François and Grossman (2015) further demonstrated that legislative turnover can be measured in different ways, leading to varying interpretations of institutional stability and renewal. Within the American context, Stone et al. (2010) emphasized the importance of incumbency quality, retirement decisions, and electoral prospects in shaping congressional careers. Their findings challenged simplistic assumptions that incumbency alone guarantees political survival. Instead, legislative longevity emerges from a complex interaction between personal ambition, electoral competition, and institutional opportunities. These studies collectively suggest that survival analysis offers a valuable framework for examining career duration because it explicitly models the timing of legislative exits.

A related strand of literature focuses on political experience and career capital. Claessen (2024) argued that party leaders with extensive political experience tend to survive longer because accumulated experience enhances strategic skills, organizational influence, and political networks. Similarly, Carey et al. (2023) demonstrated that congressional careers exhibit identifiable patterns of tenure and remaining service, suggesting the existence of systematic processes governing legislative longevity. Such findings reinforce the notion that career duration is not random but reflects the accumulation of political resources over time. Career capital may include institutional knowledge, donor networks, constituent relationships, and reputational assets. As legislators remain in office, these resources can create self-reinforcing advantages that increase survival probabilities. Consequently,

understanding legislative longevity requires attention not only to electoral conditions but also to the cumulative benefits generated through sustained political service.

Party affiliation has long been viewed as a critical determinant of congressional behavior and career outcomes. Krehbiel (1993) questioned whether parties truly dominate legislative decision-making, while subsequent scholarship emphasized the growing importance of party organizations in structuring congressional activity. Lee (2009) demonstrated that partisan considerations increasingly shape legislative behavior even when ideological differences are limited. Similarly, Lee (2016) argued that perpetual electoral competition encourages members to prioritize partisan objectives, thereby reinforcing party cohesion. DiSalvo (2012) further highlighted the significance of party factions as influential actors within broader party organizations. These developments suggest that party membership may affect legislative survival by shaping access to institutional resources, campaign support, and leadership opportunities. Consequently, differences in survival probabilities between Democrats and Republicans may reflect not only ideological distinctions but also organizational advantages embedded within party structures.

Recent studies have expanded the analysis of party dynamics by examining factional politics and intraparty organization. Koger et al. (2009) argued that cooperative factions play a significant role in shaping legislative outcomes and party strategies. Green (2019) showed how organized factions such as the House Freedom Caucus exercise influence through strategic bargaining and procedural leverage. Clarke et al. (2024) found that faction membership can produce conditional lawmaking benefits depending on institutional circumstances. These findings suggest that legislators embedded within influential factions may enjoy enhanced career prospects through increased visibility, fundraising opportunities, and policy influence. At the same time, factional alignment can create political risks if members become associated with unpopular positions or internal party conflicts. The relationship between factional politics and legislative survival therefore remains complex and warrants further investigation.

A substantial body of literature has examined ideological polarization and its consequences for congressional politics. McCarty et al. (2016) documented the long-term growth of ideological divisions between Democrats and Republicans, arguing that polarization has become a defining feature of contemporary American politics. Theriault (2008) similarly demonstrated that congressional polarization has intensified across successive decades, reshaping legislative behavior and interparty relations. Barber and McCarty (2015) further emphasized that polarization affects governance, electoral competition, and legislative productivity. Lee (2015) linked increasing polarization to growing challenges in policymaking and institutional performance. Together, these studies suggest that ideological conflict has become deeply embedded within congressional institutions. However, while polarization has been extensively studied as a collective phenomenon, less attention has been devoted to understanding how ideological positioning influences individual legislative careers and survival prospects.

The measurement of ideology has undergone significant methodological development. Poole and Rosenthal (1985) introduced spatial models of roll-call voting

that revolutionized the study of congressional ideology. Their subsequent work provided a comprehensive historical framework for understanding legislative preferences through voting behavior (Poole and Rosenthal 1997). Aldrich and McKelvey (1977) developed scaling techniques that facilitated more accurate estimation of ideological positions, while Hare et al. (2015) refined these approaches using Bayesian methods. Jessee (2016) addressed the challenge of placing citizens and political elites on a common ideological scale, thereby enhancing comparisons between representatives and constituents. Everson et al. (2016) highlighted the broader significance of NOMINATE measures for understanding American political development. These methodological advances provide researchers with increasingly sophisticated tools for assessing whether ideological orientation affects legislative longevity.

Studies examining ideology and electoral outcomes offer important insights into potential mechanisms linking ideology and survival. Ansolabehere et al. (2001) demonstrated that candidate positioning influences electoral competitiveness, while Ansolabehere and Jones (2010) showed that constituents respond to legislators' roll-call voting behavior. Bafumi and Herron (2010) argued that ideological divergence between voters and representatives can generate representation gaps with electoral consequences. Algara (2019) found that polarization conditions electoral outcomes in Senate contests, while Algara and Zamadics (2022) explored ideological inconsistencies in legislative voting. Mixon et al. (2019) further examined the stability of ideology among long-serving members of Congress. Collectively, these studies suggest that ideological positioning influences electoral incentives and public evaluations, factors that may ultimately shape legislative survival. Nevertheless, direct analyses connecting ideology to congressional tenure remain relatively limited.

The literature also emphasizes the importance of constituency relationships and representation. Gill (2021) proposed innovative approaches for measuring constituency ideology, enabling more precise assessments of representative-constituent congruence. Alexander et al. (2016) showed that distributive politics can influence legislators' ideological behavior and strategic choices. Grynaviski (2010) argued that political reputations contribute to legislative accountability and electoral success. These perspectives suggest that survival may depend partly on legislators' ability to maintain alignment with constituent preferences while simultaneously satisfying party expectations. Such balancing acts become increasingly difficult in polarized political environments where electoral coalitions may contain competing ideological demands. As a result, the interaction between constituency representation and ideological positioning constitutes a potentially important determinant of legislative longevity.

Another stream of research focuses on polarization as a broader social and political phenomenon. Iyengar et al. (2012) argued that affective polarization, rather than purely ideological disagreement, increasingly drives partisan conflict. Hirano et al. (2010) linked primary elections to growing partisan polarization, suggesting that electoral institutions can intensify ideological divisions. Kujala (2020) emphasized the role of donors and primary elections in reinforcing polarization, while Ladewig (2021) connected ideological positioning in Congress to broader socioeconomic developments such as income inequality. Moskowitz et al. (2024) further refined understanding of

congressional polarization by distinguishing different dimensions of partisan conflict. These studies indicate that polarization is shaped by multiple institutional, electoral, and social forces. Yet the implications of these dynamics for legislative career duration remain insufficiently explored.

Institutional structures within Congress also influence political survival. Curry and Lee (2020) argued that contemporary lawmaking is increasingly constrained by partisan conflict and procedural limitations. Crosson et al. (2025) demonstrated that strategic proposal-making and status quo considerations shape legislative decision-making. Fowler (2026) examined the influence of party leaders on roll-call voting, highlighting the continuing importance of leadership structures. Burke et al. (2020) and Kirkland and Slapin (2017) explored strategic disloyalty and party competition, revealing that legislators occasionally depart from party positions for electoral or policy reasons. Such behavior may affect career trajectories by altering relationships with party leaders, donors, and constituents. These findings suggest that institutional incentives and strategic behavior are closely linked to legislative survival outcomes.

Comparative and demographic studies offer additional perspectives on legislative careers. Butcher (2023) examined how term limits affect state legislative careers, highlighting the role of institutional constraints in shaping political trajectories. Holman and Mahoney (2023) demonstrated that women often continue to perform effectively even under term-limit conditions, suggesting that career dynamics may vary across demographic groups. Levita and Márquez Romo (2023) analyzed legislative amateurism and elite renewal in Latin America, emphasizing the relationship between institutionalization and political continuity. Fraga and Hassell (2020) investigated barriers faced by minority and female candidates, revealing how access to party support influences political advancement. Although these studies focus on diverse contexts, they collectively underscore the importance of institutional opportunities and demographic factors in shaping legislative careers and survival prospects.

Recent scholarship increasingly recognizes that congressional survival is shaped by a combination of ideological, institutional, and organizational factors rather than any single determinant. Aka and Dzordzormenyoh (2026) demonstrated that policy issues and institutional conditions significantly influence patterns of polarization and consensus within Congress. Brant (2024) showed that polarization affects congressional staff turnover, indicating that broader institutional dynamics extend beyond elected officials themselves. McCarty (2011) emphasized the importance of accurately measuring legislative preferences for understanding congressional behavior, while McCarty (2017) linked polarization to institutional dysfunction and constitutional tensions. Despite these advances, three notable gaps remain. First, few studies apply survival econometric techniques to congressional careers. Second, the relationship between ideological positioning and legislative longevity remains underexplored. Third, limited evidence exists regarding differences in survival probabilities across parties and chambers. Addressing these gaps can deepen understanding of congressional career dynamics and contribute to broader debates concerning representation, institutional development, and democratic governance.

Data and Methodology

Data Source and Sample

The empirical analysis draws on congressional roll-call and biographical data obtained from Voteview, the standard repository for NOMINATE ideological scores and member-level service records for the United States Congress. The analytic sample covers members of the House of Representatives and the Senate serving between the 46th and the 117th Congress, providing a long historical span over which to observe the timing of legislative exit. Each legislator-Congress spell is treated as the unit of observation, and the event of interest is departure from Congress, whether through electoral defeat, retirement, or other forms of exit. Consistent with standard survival-analysis practice, spells that had not ended by the close of the observation window are treated as right-censored. The Cox model reported in Table 1 is estimated on the basis of 12,800 recorded exit events.

Variables

The dependent variable is the duration of continuous congressional service, measured in Congresses (or years) served prior to exit. The primary explanatory variables are the first and second dimensions of the DW-NOMINATE ideological scaling procedure (Poole and Rosenthal 1985), which respectively capture the traditional liberal-conservative dimension of roll-call voting and a secondary, often regionally or issue-specific, dimension of legislative behavior. Party affiliation is coded as a dichotomous indicator (Republican = 1, Democrat = 0). Chamber membership is coded as a dichotomous indicator (Senate = 1, House = 0). Year of birth is included as a proxy for legislator age and accumulated career stage at entry, and the number of roll-call votes cast is included as a measure of legislative participation and engagement.

Estimation Strategy

The study employs the Cox Proportional Hazards Model as the primary estimation technique. The Cox model is semi-parametric in that it leaves the baseline hazard function unspecified while estimating the effect of covariates on the hazard of exit, expressed as hazard ratios. This approach is well suited to congressional career data because it does not require strong distributional assumptions about the shape of the baseline hazard and accommodates right-censored spells. As a robustness check, the study additionally estimates a parametric Weibull survival model (Table 2), which imposes a specific distributional form on the baseline hazard and allows the hazard to increase or decrease monotonically over the length of service. Convergence between the Cox and Weibull specifications, both in the sign and significance of coefficients, is used as evidence that the substantive findings are not an artifact of a particular modelling choice.

Model Diagnostics

The validity of the Cox model rests on the proportional-hazards assumption, namely that the hazard ratios associated with each covariate remain constant over the duration of congressional service. This assumption is evaluated using Schoenfeld residual tests, estimated separately for each covariate as well as globally (Table 4). Overall model fit

is assessed using the Wald chi-square and likelihood-ratio chi-square statistics, and predictive accuracy is summarized using Harrell's concordance index (C-statistic). Marginal effects, expressed in expected years of congressional tenure, are derived from the Cox estimates to translate hazard ratios into substantively interpretable quantities (Table 3).

Results and Discussion

The findings reported in Table 1 provide strong evidence that ideological positioning significantly influences congressional survival. The positive and highly significant coefficient for NOMINATE Dimension 1 indicates that legislators located further from the ideological center face a greater hazard of exiting Congress. Specifically, the hazard ratio of 1.541 suggests that a movement toward ideological extremity substantially increases the probability of departure from legislative office. This result aligns with the argument that increasingly polarized political environments expose legislators to greater electoral risks and intensify partisan competition (Theriault 2008; McCarty et al. 2016; Lee 2015). While ideological commitment can strengthen support among partisan voters, excessive ideological distance may weaken broader electoral coalitions and reduce long-term political durability. Similar patterns have been identified in studies linking ideological extremism to representation gaps and electoral vulnerability (Bafumi and Herron 2010; Algara 2019; Alexander et al. 2016). The result therefore suggests that congressional longevity is partly conditioned by a legislator's ability to balance ideological consistency with electoral adaptability.

The significance of NOMINATE Dimension 2 further demonstrates that secondary ideological characteristics also shape legislative careers. Although its effect is smaller than that of the primary ideological dimension, the positive coefficient indicates that legislators occupying distinctive ideological or regional positions face higher exit risks. Previous scholarship has shown that congressional voting behavior increasingly reflects multidimensional ideological divisions that extend beyond traditional liberal-conservative distinctions (Algara and Zamadics 2022; Jessee 2016; Hare et al. 2015). As polarization deepens, legislators associated with less broadly supported ideological positions may experience reduced electoral resilience. This finding supports the proposition that congressional survival is influenced not only by major ideological alignments but also by more nuanced dimensions of political identity that shape coalition building and constituent support.

The coefficient associated with party affiliation is statistically insignificant, indicating that Republican legislators do not exhibit survival probabilities that differ substantially from those of Democrats after controlling for ideology, chamber, age, and legislative participation. This finding is noteworthy because much of the literature on congressional polarization emphasizes increasing partisan divergence and institutional conflict (Barber and McCarty 2015; Lee 2009; Curry and Lee 2020). However, the absence of a significant party effect suggests that legislative longevity may be driven less by partisan labels and more by individual-level characteristics and institutional factors. Krehbiel (1993) argued that legislative behavior often reflects preferences that transcend party structures, while Grynaviski (2010) emphasized the role of personal reputations and accountability in sustaining political careers. The present results

support these perspectives by indicating that survival outcomes depend primarily on the characteristics of legislators rather than their partisan identities alone.

Table 1. Cox Proportional Hazards Estimates of Legislative Exit from Congress

Variables		β	HR	SE	z	p
Ideological Position (Nominate Dim1)		0.432***	1.541	0.081	5.33	0.000
Secondary Ideological Dimension (Nominate Dim2)		0.117**	1.124	0.053	2.21	0.027
Party Affiliation (Republican=1)		-0.086	0.918	0.061	-1.41	0.159
Chamber (Senate=1)		-0.514***	0.598	0.072	-7.14	0.000
Year of Birth		-0.008***	0.992	0.002	-4.00	0.000
Number of Roll-Call Votes		-0.0004***	0.9996	0.0001	-4.89	0.000
Model Statistics						
Statistics			Value			
Number of Failures (Exit Events)			12,800			
Log-Likelihood			-74,582.16			
Wald χ^2			368.54***			
Likelihood Ratio χ^2			401.27***			
Concordance Index (C-Statistic)			0.742			

Note: β = coefficient; HR = hazard ratio; SE = standard error; z = z-statistic; χ^2 = chi-square.

*Significance levels: ***p<0.01, **p<0.05, p<0.10

Source: Author (2026)

Table 2. Robustness Check Using Weibull Survival Model

Variables	β	SE	z	p
Nominate Dim1	0.381***	0.075	5.08	0.000
Nominate Dim2	0.098*	0.051	1.92	0.054
Party Affiliation	-0.071	0.059	-1.20	0.230
Chamber	-0.492***	0.068	-7.24	0.000
Year of Birth	-0.007***	0.002	-3.76	0.000
Number of Votes	-0.0003***	0.0001	-4.15	0.000

Note: β = coefficient; SE = standard error; z = z-statistic. *Significance levels: ***p<0.01,

**p<0.05, p<0.10

Source: Author (2026)

One of the strongest effects in Table 1 is associated with chamber membership. Senators exhibit a significantly lower hazard of exit than House members, as reflected

by the hazard ratio of 0.598. This finding is consistent with institutional theories emphasizing the distinct electoral and organizational structures of the Senate and House (Cox and McCubbins 2007; Lee 2016). Senators benefit from longer terms, broader constituencies, and greater visibility, factors that often contribute to stronger incumbency advantages and more stable careers. Historical analyses of congressional tenure similarly report lower turnover rates among senators relative to representatives (Hibbing 1991; Eckman and Wilhelm 2025). The result suggests that institutional design itself plays a critical role in shaping political survival, independent of ideological orientation or partisan affiliation.

The negative coefficient on year of birth indicates that older legislators tend to experience lower exit hazards and consequently longer congressional careers. This finding is broadly consistent with career-capital theories which argue that accumulated political experience, networks, and institutional knowledge enhance survival prospects (Claessen 2024). Experienced legislators often possess stronger fundraising capabilities, greater policy expertise, and more established relationships with party elites and constituents. These advantages may insulate them from electoral shocks and internal party challenges. Similar conclusions emerge from studies of congressional career development and incumbency advantages (Brady et al. 1999; Stone et al. 2010). Consequently, legislative survival appears to reflect not only ideological positioning but also the gradual accumulation of political resources over time.

Legislative participation, measured through the number of roll-call votes, also exerts a significant influence on survival. Although the estimated coefficient is numerically small, its negative sign indicates that greater legislative engagement lowers the hazard of congressional exit. Active participation may signal commitment, competence, and responsiveness to constituents, thereby strengthening reelection prospects. Research on congressional accountability emphasizes that legislative visibility and policy involvement contribute positively to political reputations (Ansolabehere and Jones 2010; Fowler 2026). Legislators who consistently engage in legislative processes may therefore cultivate stronger electoral support and institutional influence, extending their congressional careers.

The overall model diagnostics reported in Table 1 confirm the robustness of the empirical findings. The highly significant Wald and likelihood-ratio statistics demonstrate strong explanatory power, while the concordance index of 0.742 indicates substantial predictive accuracy. Such performance suggests that ideological, institutional, and demographic variables collectively explain a significant proportion of variation in congressional survival. This finding reinforces arguments that legislative careers are shaped by a combination of individual attributes and institutional contexts rather than by random electoral fluctuations alone (McCarty 2011; Poole and Rosenthal 1997).

The robustness analysis presented in Table 2 further strengthens confidence in the main results. The Weibull survival model reproduces the direction and significance of the key explanatory variables, including ideological dimensions, chamber membership, year of birth, and voting participation. The consistency of results across semi-parametric and parametric frameworks suggests that the identified relationships are not sensitive to specific distributional assumptions. Such robustness is particularly

important in long-term congressional studies because political environments, electoral systems, and institutional arrangements evolve over time (François and Grossman 2015; Matland and Studlar 2003). The persistence of the findings across modelling approaches therefore enhances their credibility.

Table 3 translates the hazard estimates into substantive effects on expected congressional tenure. The marginal effects indicate that movement toward ideological extremity substantially reduces expected years of service. Specifically, a one-unit increase in NOMINATE Dimension 1 decreases expected survival duration by approximately 1.84 years, while the second ideological dimension reduces survival by nearly half a year. These findings provide concrete evidence that ideological positioning carries meaningful career consequences. In contrast, Senate membership increases expected survival duration by more than four years, underscoring the importance of institutional structures in shaping political careers. The positive effect of age and legislative activity further supports arguments emphasizing experience and engagement as sources of political resilience (Claessen 2024; Carey et al. 2023).

Finally, Table 4 reports the Schoenfeld residual tests used to assess the proportional hazards assumption. Neither the individual variable tests nor the global test reject the null hypothesis of proportionality. This outcome confirms that the effects of ideology, party affiliation, chamber membership, age, and legislative participation remain relatively stable throughout congressional careers. The validity of the proportional hazards assumption strengthens confidence in the Cox estimates and supports the interpretation that the identified determinants exert persistent influences on legislative survival. Taken together, the results suggest that congressional longevity is shaped by a combination of ideological moderation, institutional advantages, accumulated political experience, and active legislative engagement. While party affiliation appears less consequential than often assumed, ideological positioning and institutional context emerge as the principal drivers of legislative survival in the United States Congress.

Table 3. Marginal Effects on Expected Congressional Survival Duration

Variable	ME (yrs)	SE	p
Nominate Dim1	-1.84***	0.39	0.000
Nominate Dim2	-0.47**	0.21	0.025
Republican Party	0.72	0.58	0.213
Senate Membership	4.36***	0.87	0.000
Year of Birth	0.05***	0.01	0.000
Number of Votes	0.002***	0.001	0.001

Note: ME = marginal effect (in years); SE = standard error. *Significance levels: ***p<0.01, **p<0.05, p<0.10

Source: Author (2026)

Table 4. Proportional Hazard Assumption Test

Variable	χ^2	p
Nominate Dim1	1.47	0.225
Nominate Dim2	0.96	0.327
Party Affiliation	2.12	0.145
Chamber	1.84	0.175
Year of Birth	0.71	0.399
Number of Votes	0.92	0.338
Global Test	5.74	0.571

Source: Author (2026)

Policy Implications

The findings suggest that increasing ideological polarization may have unintended consequences for legislative continuity and institutional effectiveness. Since ideological extremity is associated with higher exit risks, political parties may benefit from encouraging broader ideological coalitions rather than rewarding only highly polarized candidates. Excessive polarization can weaken legislative stability, complicate consensus-building, and reduce institutional memory within Congress (McCarty et al. 2016; Lee 2015; Theriault 2008). Policies that encourage cross-party collaboration and bipartisan legislative initiatives could therefore contribute to more sustainable congressional careers and improved governance outcomes.

The significant relationship between legislative longevity and ideological moderation highlights the importance of electoral institutions that reward broad-based representation. Electoral reforms designed to reduce incentives for extreme partisan positioning may help strengthen legislative durability. Previous research indicates that primary-election dynamics, donor behavior, and partisan competition often encourage ideological divergence (Hirano et al. 2010; Kujala 2020; Barber and McCarty 2015). Policymakers may therefore consider reforms that promote wider voter participation in candidate selection processes and reduce institutional pressures toward polarization.

The strong survival advantage enjoyed by senators relative to House members also carries important institutional implications. The findings suggest that longer electoral cycles and greater opportunities for policy specialization contribute to legislative continuity. While altering constitutional structures is unrealistic, House leadership may adopt institutional mechanisms that help representatives accumulate expertise and long-term policy experience. Strengthening committee systems, expanding legislative research support, and improving opportunities for policy specialization could help reduce turnover and enhance legislative effectiveness (Cox and McCubbins 2007; Lee 2016; Curry and Lee 2020).

Another implication concerns the value of political experience and career capital. Legislators with greater accumulated experience demonstrate stronger survival prospects, indicating that institutional knowledge remains a valuable public resource. Congress may therefore benefit from investing further in professional development programs, orientation initiatives, and mentorship structures that facilitate the transfer of

expertise between experienced and newly elected members. Such measures could preserve institutional capacity while reducing the disruptive effects of turnover (Claessen 2024; Hibbing 1991; Eckman and Wilhelm 2025).

The results also demonstrate that active legislative participation enhances political survival. This finding suggests that constituents may reward legislators who engage consistently in congressional activities and policy deliberations. Congressional leaders could strengthen accountability mechanisms by improving transparency regarding voting participation, committee attendance, and legislative contributions. Enhanced public access to information may encourage greater engagement by elected officials while simultaneously improving voter evaluations of representative performance (Ansolabehere and Jones 2010; Fowler 2026; Grynaviski 2010).

Finally, the absence of a statistically significant party effect indicates that long-term congressional survival depends more on institutional engagement, ideological positioning, and accumulated experience than on partisan identity alone. This finding challenges narratives that attribute legislative success primarily to party affiliation. Instead, policies aimed at strengthening legislative effectiveness should focus on enhancing institutional performance, fostering constructive political competition, and promoting representative responsiveness. Encouraging evidence-based policymaking, strengthening congressional capacity, and reducing incentives for excessive polarization may ultimately improve both legislative longevity and democratic governance in the United States (Krehbiel 1993; McCarty 2017; Wolak 2020; Aka and Dzordzormenyoh 2026).

Conclusion and Discussion

This study examined the determinants of legislative longevity and survival in the United States Congress using a survival econometric framework applied to congressional data spanning the 46th to the 117th Congress. The findings reveal that ideological positioning plays a significant role in shaping congressional careers. Both NOMINATE ideological dimensions significantly increased the hazard of legislative exit, indicating that legislators located further from the ideological center generally experience shorter congressional tenures. These results support long-standing arguments that increasing political polarization creates electoral and institutional pressures that can reduce the durability of legislative careers. By contrast, party affiliation did not exert a statistically significant influence on survival outcomes, suggesting that ideological orientation and institutional characteristics are more important predictors of congressional longevity than partisan identity alone.

The analysis further demonstrates that institutional and demographic factors substantially influence survival probabilities. Senate membership significantly reduced the risk of congressional exit and increased expected survival duration by more than four years relative to House membership. Likewise, legislators with greater legislative experience and older cohorts exhibited stronger survival prospects. Active participation in roll-call voting also contributed positively to legislative longevity, highlighting the importance of engagement and visibility in sustaining congressional careers. These findings reinforce the view that legislative survival is shaped by a combination of institutional advantages, accumulated political capital, and sustained participation in

the policymaking process. The robustness of these relationships across both Cox and Weibull survival models strengthens confidence in the empirical results.

Overall, the study contributes to the literature on congressional careers by integrating ideological, institutional, and behavioral explanations within a unified survival-analysis framework. The results indicate that while contemporary congressional politics is increasingly characterized by polarization, long-term legislative survival depends on a broader set of factors than party competition alone. The evidence suggests that ideological moderation, institutional experience, and legislative engagement remain central to sustaining successful congressional careers. Future research may extend this analysis by incorporating constituency characteristics, campaign finance variables, leadership positions, and committee assignments to provide a more comprehensive understanding of the mechanisms driving legislative survival and turnover in democratic institutions.

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Ethics Statement

The author confirms that this study was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The author declares no conflict of interest

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“BIG BROTHER” OR “FALSE ALLY”: PERCEPTION OF ANTI-RUSSIAN SENTIMENT IN THE CONTEXT OF THE RESULTS OF THE 2026 PARLIAMENTARY ELECTIONS IN ARMENIA

ARTUR MKRTICHYAN* 
Yerevan State University

Abstract

This article presents a comparative analysis of the geopolitical and regional aspects—as well as the significance—of the elections to the National Assembly of the Republic of Armenia held on June 7, 2026. Particular attention is paid to the actions of the political opposition, which sought to capitalize on Armenia’s economic dependence on Russia. Pro-Western political forces in Armenia relied on support from the US and the EU, leveraging the fact that Russia had pursued an unfriendly foreign policy in recent years by drawing closer to Azerbaijan and Türkiye. The image of Russia as a military ally—which had replaced the Soviet-era “Big Brother” myth—was undermined by the 44-day war in Artsakh in 2020, the subsequent occupation of part of Armenia’s sovereign territory, and Russia’s failure to honor its allied obligations during the ethnic cleansing of the Armenian population of Nagorno-Karabakh carried out by Azerbaijan starting in 2023. A negative perception of Russia took hold in Armenian public discourse, leading to the defeat of pro-Russian political forces in the parliamentary elections of June 7, 2026. These results demonstrate that, for Armenia’s re-elected leadership, security issues and the prospects for developing cooperation with the EU—as well as implementing the strategic partnership agenda between Armenia and the European Union—are of paramount importance, particularly in light of Armenia’s integration into regional transport networks.

Keywords: *National Assembly elections, group identity, Armenian-Russian perceptions, Armenian public discourse, Russia’s image, military ally, ethnic cleansing.*

Introduction

In an increasingly globalized world, European and Eurasian integration processes—viewed through the lens of transforming Russian-Armenian relations—are attracting close attention from scholars across the globe. A significant challenge inherent in this process is the contentious nature of many fundamental principles and tenets underlying the formation of integration blocs involving Russia; this lack of consensus does not

* **Artur Mkrtichyan** is a Prof., Doctor of Philosophical Sciences, and Dean of the Faculty of Sociology at Yerevan State University. Email: amkrtchyan@ysu.am. ORCID: <https://orcid.org/0000-0002-7891-7068>.



always facilitate a comprehensive approach to resolving issues related to foreign policy, economic, military, and humanitarian cooperation.

The relevance of this topic is further underscored by the fact that the post-Soviet geopolitical landscape has become a theater where the interests of global power centers collide and a struggle for access to energy and other natural resources unfolds. A critical factor complicating effective cooperation between Armenia and Russia is the influence of external forces—specifically, opposition from the United States and the West to Russia's efforts to politically and economically consolidate Armenia amidst the intensifying rivalry among global power centers.

On June 7, 2026, elections to the National Assembly of the RA took place. They had a complex geopolitical context and were expected to bring clarity to the relations among Armenia's political forces (OSCE ODHIR 2026a, 2026b). To make sense of the results, we must establish what has changed in Armenia's political life and in citizens' perceptions. The research task is to uncover the nature, basis, direction and social consequences of the transformation of public perceptions. This highly topical problem can be addressed through analysis of public discourse, expert surveys, monitoring of media coverage, and sociological and political-science analysis of historical events and official documents.

Eighteen political units (electoral blocs and parties) took part in the NA elections from start to finish. The total number of voters was 2,503,990 citizens, and 1,476,769 citizens (58.98 percent) took part in the vote. The official number of voters also includes citizens who are physically absent from Armenia, many of whom have emigrated since the 1990s. According to expert estimates, the outflow of people from Armenia in 1991-2000 alone amounted to about 1.3 million (Khojabekyan 2002, 308-309; Atoyan, Karapetyan and Atoyan 2023). Net migration remained negative in the following years as well. Many Armenian citizens have settled permanently abroad without renouncing RA citizenship. We can estimate their approximate number from various sociological surveys. For example, a survey we conducted immediately after the 2021 National Assembly elections in Armenia showed that approximately 500,000 citizens of the Republic of Armenia had been absent from the country for a very long time (Atanesyan and Mkrtichyan 2022, 25).

The RA authorities have always tried to take advantage of this reality, regarding the transfers sent to Armenia by migrants as an important financial and economic factor. Thus, "in 2024, individuals sent \$5.8 billion to Armenia from abroad through banks" (Hergnyan 2025). In January–April 2026, "the inflow of cross-border transfers received by individuals from abroad amounted to 2.08 billion USD, compared with 1.77 billion USD in the first 4 months of last year. Among the leaders in transfers to Armenia are Russia, with 1.32 billion USD, and the USA, with 269.6 million USD" (ARKA News Agency 2026). Private transfers benefit not only the well-being of Armenia's residents but the entire Armenian economy. Incidentally, a significant share of Armenia's exports comes from enterprises under the control of Russian capital.

Public perceptions of Armenian-Russian relations

Relations between Russia and Armenia occupy a special place in integration processes; they are underpinned by deep-seated socio-economic, political, and historical-cultural

ties, which serve as the foundation for maintaining and enhancing various forms of cooperation. This fact further underscores the need to analyze and synthesize the experience of developing Russian-Armenian relations, as examining this subject helps define a shared platform for positioning the national interests of both Russia and Armenia. Beyond economic calculations, to understand the results of the current parliamentary elections and their consequences we must analyze other circumstances that shape public perception of Armenian-Russian relations. Reality is somewhat distorted in our picture of the world, so people's perceptions work less on goal-rational lines than on a historical-political and socio-cultural foundation formed over time. On the other hand, the fundamental characteristics of identity largely determine the particularities of perceptions. At the current stage of Armenia's historical development, it is especially important to examine these perceptions in the context of the 2020 Armenian-Turkish 44-day Artsakh war.

Losing that war confronted Armenian society with major losses of positive identifications. Identifications are conditioned by perceptions, and the sum of identifications forms social identity, which is fed by attributions to and valuations of different social groups and depends on perceptions of those groups (Harrod and Serpe 2026). The loss of positive identifications produces an identity crisis, which inevitably shows up in a reassessment of how people perceive their relationship with other significant groups (in this case, Russians). The crisis realities of post-war Armenia were bound to affect relations with Russia. Alongside this influence, a gradual and ambivalent transformation of the traditional perceptions of those relations began.

During the Soviet period, the official false concept that ideologically justified the nature of relations among the peoples of the USSR shaped certain Armenian stereotypes of Russians. The field of public perception of Armenian-Russian relations was defined mainly by the templates of the "blessed Russian," the "big brother," and the "savior nation." Here we are dealing with stereotypes rooted both in the Armenian literature of the tsarist period (Khachatur Abovyan) and in Soviet-era propaganda. When great tension arose with official Moscow in the early stage of the Republic of Armenia's independence, these stereotypes began to erode. In response to Armenian centrifugal aspirations, the USSR's military-political leadership organized the ill-fated Operation "Ring." Military operations against the civilian population of the Shahumyan, Shushi, Martakert and Hadrut districts of the Nagorno-Karabakh Republic, carried out from April 30, 1991, depopulated three dozen villages of Armenians. A great test for the traditional perceptions of Armenian-Russian relations was the killing of 14 Armenian policemen by Russian soldiers of the Soviet army on May 6 in the village of Voskepar in the Noyemberyan district of the Armenian SSR. Armenian public consciousness was shaken by such a blow, but an attempt was immediately made to distinguish between the Russian soldier and the Soviet soldier carrying out a criminal order. That distinction, however, destroyed the communist myth of the "liberating Soviet soldier," which fit poorly with the consciousness of Armenians who had served in the Soviet army and had fought heroically in the Second World War.

In this context—and time and again following some psychological shock—Armenians would restore Russia to the status of their protector. Virtually the entire

history of Armenian culture over the last two centuries has been a succession of Armenian-Russian conflicts—some merely psychological, others manifested in concrete actions—yet all of them, without exception, ended in reconciliation (Lurie 2017, 208-209). According to the ethnologist, the Armenians wanted to see ‘ideal Russians,’ and they managed to do so even when real Russians were shooting at them (Lurie 2017, 226). One simply had to wait, and the Armenians began to wait for the Russians themselves to understand who their friend is and what their interests are (Lurie 2017, 216). In this context, one gets the impression that Russia is looking for friends in entirely the wrong places—and that is precisely why it is losing all its geopolitical battles.

The point is that, depending on specific situations, some negative attributions can become salient and give rise to conflict-prone patterns of group behavior. When social identities are incompatible, large-scale intergroup conflicts are possible, including military clashes. In this case, it is very important to distinguish the friendly environment of the “We” (the ally) from the groups perceived under the category “They,” and naturally from the “enemy,” who should usually be perceived as such by the “ally” too. And even if the “ally” holds no such perception, it must necessarily arise in the future.

To understand this peculiarity, one must bear in mind that within this attribution Russia appears in the image of the “ally,” since corresponding value imperatives operated among Armenians as their modern picture of the world was formed. These were later instrumentalized and determined the stability of the Armenian model of perceiving Russia. A positive self-description of the “We” image necessarily presupposes a positive perception of the significant traditional “ally” image. In a certain historical context, having an ally had become an existential condition for Armenians (Lurie 2017, 207; Shestopal 2018).

Group identity implies that a group serves as the bearer of a specific identity. The formation of identity can be viewed as the result of interaction with the “non-self.” From a methodological standpoint, the other groups with which a given group interacts serve as a key criterion for assessing its identity. At the group level, identity is also formed within a positive framework; this requires cultivating a positive attitude toward significant groups by emphasizing one’s own group’s positive qualities and evaluating other groups through the lens of those qualities.

Institutionalization of relations and the transformation of perception

In the new historical conditions after the collapse of the Soviet Union, diplomatic relations between the Republic of Armenia and the Russian Federation were established on April 3, 1992. Of course, the establishment of diplomatic relations between newly independent Armenia and the Russian Federation marked an entirely new political reality: Armenia was no longer a part of Russia. These new realities also brought corresponding transformations in the public perception of Armenian-Russian relations. Accordingly, the question of Armenian-Russian relations turned into a question of Armenia-Russia relations, and the social perceptions of that question were transformed in parallel. Stereotypes about Russians were pushed largely into the sphere of everyday relations, giving way in the domain of political consciousness to ideas

about relations with Russia as a separate state. These ideas are partly based on traditional templates and partly formed in the context of new legal and political interstate processes.

On August 29, 1997, the Republic of Armenia and the Russian Federation concluded the Treaty on Friendship, Cooperation and Mutual Assistance between the RF and the RA, which established allied relations between the RA and RF (MFA of the RF 1997). In public perception, allied relations form the image of the “ally,” which replaces the template of the “big brother.” They greatly transform the nature of perceptions from ideological to institutional. This transformation strips them of their sacral character, making the public valuation of Armenian-Russian relations dependent on how effectively the formal allied obligations of the RA and RF are actually fulfilled.

In the Treaty on Friendship, Cooperation and Mutual Assistance between the RF and the RA (Article 3), the RA and RF committed that “The High Contracting Parties shall jointly take all measures available to them to eliminate a threat to the peace or a breach of the peace, or to counter acts of aggression against them by any state or group of states, and shall provide each other with the necessary assistance, including military assistance, in the exercise of the right of collective self-defense in accordance with Article 51 of the UN Charter” (MFA of the RF 1997)

That Treaty is the foundation of the institutionalization of Armenian-Russian relations, and institutionalization produces stable patterns of collective behavior and corresponding expectations (Mkrtichyan, Vermishyan and Balasanyan 2016). An important orientation point of this behavior is the image of the “ally,” which is thematized semantically in public consciousness and can even lead to internal conflicts. But even then the image of the “ally” remains stable as long as the concept of the “We” group’s self-construction has not changed. In this respect, one can say that the Armenian mentality was characterized by a long-term positive coloring of the ally, even when negative episodes are observed in the relations between allies.

But when negative episodes undermine the institutional foundation of the relationship, the ally as such may also be reassessed. The 44-day Artsakh war and the clashes that followed had a very strong resonance among Armenian citizens. “We ask for help, and they tell us to apply in writing. Is help given through written notes?” This is the generalized view of ordinary Armenian citizens, formed in September 2022 and May 2023 regarding the RF’s fulfillment of allied obligations during Azerbaijani encroachments on and military incursion across the RA’s state border. People believe that friends should not wait for official letters in order to help each other. For the ordinary Armenian citizen, what is incomprehensible is not only the role of the Russian state authorities but also the absence of a pro-Armenian response from Russian society. After all, Russians should apparently not put an equals sign between the two conflicting sides, since one (Armenia) is Russia’s ally and the other (Azerbaijan) is not. And Azerbaijan would hardly have attacked the RA’s state border if it had not been sure that this border would not be regarded as a CSTO border. In the perceptions of RA citizens, Azerbaijan’s arming with Russian-made weapons did not fit well with the fulfillment of allied obligations. Russian officials always spoke of Russia’s commitment to maintaining the military balance between Armenia and Azerbaijan, but they failed to do even that.

This is how ordinary Armenian voters think, those who do not delve into the subtleties of the geopolitical game and do not make complex strategic calculations. For them, what matters is Russia's failure to fulfill its allied obligations in the context of violations of the RA's state borders.

There are also other circumstances that give rise to negative perceptions of Armenian-Russian relations. However much Armenians strive to preserve in their picture of the world the image of Russia as a faithful ally, the real Russia does not coincide with the ideal Russia. In modern conditions, the diversity of information flows deals a heavy blow to traditional ideas. The influence of the media on the internal thematization of external relations is very great here. In Russia's case, the following themes that shape that country's image can be singled out:

- relations between the RF and RA in various fields (economy, migration, security, the military sphere, culture, freedom of speech, etc.) and attitudes toward Armenians,
- the Russian-Ukrainian war and the RF's international relations,
- events inside Russia.

Russian media constantly report that relations between the RF and the West are steadily deteriorating, that Russia's ties with Türkiye and Azerbaijan are becoming more active, that internal security problems are numerous, and that cultural figures in various fields have left Russia (Aleksanyan 2025). At the same time, Western-oriented Armenian (and not only Armenian) media talk a great deal about the certain diplomatic support shown by the authorities of France and other European countries in the post-war situation. They cover meetings of Armenian officials with European politicians and criticize Russia's attitude toward Armenia. In this respect, the German newspaper Tagesspiegel's treatment of the Artsakh war is noteworthy: "Russia's role in the South Caucasus remains ambiguous, since the supposed protector of the Armenians is at the same time both Türkiye's trading partner and its geostrategic rival. The territorial, demographic and military asymmetry between Armenia and Azerbaijan also characterizes the unequal involvement of the powers protecting them. While since 1992 Türkiye has supported its Azerbaijani 'brother people' with logistical and military advisers, Russia waited six weeks to see how the Armenian armed forces would be worn down in their fight against Azerbaijanis, jihadists and Syrian mercenaries" (Tagesspiegel 2020)

Armenia's Europeanization and the June 2026 parliamentary election outcomes in the context of the perception of Russia's image

Active propaganda in the media undoubtedly contributes to the spread of negative perceptions of Russia among Armenians. Therefore, many Armenian citizens prefer the Armenian authorities' complementary approach (Atanesyan and Mkrtichyan 2023; Atanesyan, Reynolds and Mkrtichyan 2024, 3-12) in foreign policy matters, and even Armenia's possible membership in the European Union. In 2001, Armenia became a full member of the Council of Europe, and on November 24, 2017, the Republic of Armenia concluded the Comprehensive and Enhanced Partnership Agreement (CEPA) with the European Union. In March 2025, the Parliament of Armenia adopted the "On

Launching the Process of the Republic of Armenia's Accession to the European Union," aimed at developing democratic institutions, improving the population's well-being, and strengthening security, resilience, and the rule of law.

It is especially educated young people, who lack the Soviet-era experience of shared public life with Russians, who aspire to the European Union. For this reason, anti-Russian sentiment reaches greater proportions among young Armenians. They regard Russia as the greatest obstacle to that process and a threat to the RA's sovereignty. Armenian citizens fear that Russia is pursuing a neo-colonial rather than an allied policy toward Armenia. These concerns intensified when, in the run-up to the 2026 elections to Armenia's National Assembly, Russia created obstacles and imposed bans on the import of Armenian agricultural products, disregarding EAEU norms and calling into question the active cooperation between the Republic of Armenia and the Russian Federation under the Treaty on the Eurasian Economic Union of May 29, 2014.

The 2026 National Assembly elections in Armenia should be viewed against the backdrop of all these events (see Table 1). The election results are notable for the shifts that have occurred in the foreign policy orientation of Armenian society. A number of political parties participating in the campaign adopted anti-Russian stances; although some failed to clear the minimum threshold required to secure seats in the National Assembly, collectively they garnered more than 60% of the vote. These political forces embraced a strategy of consistent Europeanization for Armenia, asserting that the country's security would be strengthened through cooperation with the EU and the United States.

Armenia's Central Election Commission has announced the final results of the country's parliamentary elections, with three parties securing seats in parliament. Prime Minister Nikol Pashinyan's pro-European ruling party, Civil Contract, won 64 of the 105 seats, while the pro-Russian opposition parties—"Strong Armenia" and the Alliance "Armenia"—secured 29 and 12 seats, respectively (see Table 1).

Table 1. Political parties in the National Assembly of the RA based on the results of the elections held on June 7, 2026

Party/Alliance	Votes	%	Seats	%
Civil Contract	726,819	49.74	64	60.95
Strong Armenia	340,006	23.27	29	27.62
Armenia Alliance	144,983	9.92	12	11.43
Total	1,476,769	58.98		105
Registered voters	2,503,990			

Source: The Central Electoral Commission of the RA 2026

The reaction of Russian Foreign Ministry spokesperson M. Zakharova was striking; following her lead, other official Russian institutions began asserting that the Armenian authorities had flagrantly violated democratic procedures for holding free elections (MFA of the RF 2026). This marked the first time Russia neither recognized the

Armenian Prime Minister nor offered congratulations, taking the view that the election campaign and the voting process themselves took place amidst harsh repression by the Armenian authorities against opposition parties and movements, as well as their activists and supporters.

Rossotrudnichestvo has announced the results of the “In which countries is Russia loved the most?” survey; Armenia ranked among the top three, while Tajikistan took first place, followed by Serbia. Other countries with the warmest attitudes toward Russia included Kazakhstan, Kyrgyzstan, Moldova, Syria, Ukraine, Bulgaria, and China (Tass 2020). In other words, among Armenians a vast change has taken place in the image of Russia, from “big brother” to “false ally.”

The failure of the Russian peacekeeping mission, and the ethnic cleansing and forced expulsion of the Armenians of Artsakh from Nagorno-Karabakh carried out by the Azerbaijani authorities in 2023 with their permission, once again forced people to recall the disgraceful Treaty of Kars. A hundred years later, history seems to be repeating itself: Russia and Türkiye are reaching agreements about the boundaries of Armenian statehood in place of the Armenians.

After this, we can state unequivocally that a clear trend toward a change in foreign policy orientation is already noticeable in Armenia. After all, the guarantee of one's own existence cannot be entrusted to someone else. It is the nation-state that ensures a nation's political independence, economic autonomy, citizens' physical inviolability and social prosperity, and the preservation and development of national culture.

Conclusion and discussion

Russians' public perceptions in post-Soviet Armenia derive from the history of roughly two centuries of Armenian-Russian relations and are given meaning against the backdrop of legal-political, socio-economic and cultural historical developments. These perceptions differed in different periods: the Russian is a “big brother,” the Russian is an “ally,” the Russian is a “traitor,” and so on. The image of the ally was institutionalized mainly in the post-Soviet period, based on official relations between the RF and the RA.

Labor migration to Russia contributed to the formation and maintenance of this “ally” stereotype. The largest Armenian Diaspora community is located in Russia, which is likewise a very important and influential factor in the emergence of pro-Russian sentiment. Thus, perceptions of Russian-Armenian relations are formed and institutionalized under the influence of the corresponding security, economic, socio-cultural and psychological factors.

Nevertheless, there are factors that to some extent hinder the reproduction of Russia's positive image. Russian pressure on Armenia thwarted the conclusion of the Association Agreement with the EU. The deterioration of Russia-West relations was manifested as Russian displeasure with Armenia's complementary foreign policy. Advocates of European integration in Armenian society began to protest against this Russian stance. Public discourse often pointed to Russia's continued arming of Azerbaijan with modern offensive weapons, which led to a violation of the balance between the armed forces of Armenia and Azerbaijan. Those weapons were used against the Armenian civilian population in the Artsakh war. Russia's positioning as Türkiye's partner is also noticeable. There is a disagreement between Armenia and

Russia over the perception of the enemy: Azerbaijan, perceived by Armenians as an enemy, is Russia's "friend," while the European Union, Russia's enemy, is Armenia's.

The education sector is the most Europeanized area of public life in Armenia, and educated young people recognize the harm caused by Russia's controversial policies. This awareness spreads through the media and is reflected in the statements of various politicians and government officials. All of this led to the defeat of pro-Russian political forces in the 2026 elections to Armenia's National Assembly.

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Ethics Statement

The author confirms that this study was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The author declares no conflict of interest.

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POLYCRISIS AND THE TRANSFORMATION OF INTERNATIONAL ORDER: A SYSTEMIC COMPLEXITY FRAMEWORK

MOHAMED IBRAHIM HASSAN FARAG* 
Cairo University

Abstract

This article analyzes issues surrounding the polycrisis and the transformation of the international order through the lens of systemic complexity. The growing intertwining of geopolitical rivalry, economic shocks, technological competition, climate change, health crises, and resource security challenges has fundamentally altered the nature of contemporary international politics. These crises do not merely unfold in isolation; they increasingly reinforce one another, generating cascading effects and systemic vulnerabilities that challenge traditional conceptions of the international order. While existing international relations theories offer insight into specific aspects of instability, they often fail to explain the mechanisms of interaction between simultaneous crises and their broader consequences. This article develops a conceptual model based on the principle of systemic complexity to explain how the polycrisis drives the transformation of the international order. Drawing on complexity theory and systems thinking, the authors conceptualize the international order as a complex adaptive system comprising multiple actors operating across closely interconnected domains: security, the economy, technology, the environment, and public health. Through mechanisms of interdependence, spillover effects, feedback loops, and adaptive responses, the polycrisis generates non-linear dynamics that reshape patterns of cooperation, competition, and governance. Based on qualitative conceptual analysis and illustrative examples, the article argues that the polycrisis constitutes a systemic state rather than a mere temporary accumulation of disparate shocks. The proposed approach offers a complexity-theory perspective on contemporary global transformations and provides a foundation for further research into the evolving architecture of the international order.

Keywords: *polycrisis, international order, systemic complexity, complexity theory, complex adaptive systems, fragmented multipolarity, global governance, strategic competition, interdependence, systemic transformation.*

* **Mohamed Ibrahim Hassan Farag** is a PhD in Political Science of the Faculty of Economics and Political Science at Cairo University and a Doctorate in Business Administration at Helwan University. Email: mohamed_ibrahim2020@feps.edu.eg. ORCID: <https://orcid.org/0009-0004-4989-9261>.



Introduction

The contemporary international system is increasingly characterized by the simultaneous interaction of multiple crises that transcend conventional boundaries between security, economics, technology, health, and the environment. Unlike previous periods, when crises were often analyzed as isolated events, recent developments have revealed the existence of complex interactions among different sources of instability. These interactions have challenged existing understandings of international order and highlighted the need for analytical approaches capable of explaining how interconnected disruptions reshape global politics. Against this background, the present study investigates the implications of polycrisis for international order and proposes a Systemic Complexity Framework as a means of understanding contemporary transformations.

The post-Cold War period was initially characterized by expectations of increasing globalization, economic integration, and institutional cooperation. However, the twenty-first century has witnessed a succession of crises whose cumulative effects have altered the nature of international politics. The global financial crisis, the COVID-19 pandemic, the Russia-Ukraine war, climate change, technological fragmentation, energy insecurity, and food shortages have demonstrated that disturbances in one domain often generate consequences that extend far beyond their original context (Tooze 2022).

Recent developments reveal a shift from isolated crises toward interconnected and mutually reinforcing disruptions. The COVID-19 pandemic, for example, was initially perceived as a health emergency but rapidly evolved into an economic, social, and geopolitical challenge that disrupted supply chains, intensified inflationary pressures, and accelerated strategic competition. Similarly, the Russia-Ukraine war has affected not only European security but also global energy markets, food security, and geopolitical alignments. Climate change, meanwhile, increasingly interacts with migration, resource scarcity, and social instability, producing multidimensional effects that transcend national borders (Homer-Dixon et al. 2022).

These developments suggest that the international system is experiencing a new phase characterized by increasing complexity and interdependence. Rather than producing isolated consequences, contemporary crises create cascading effects that spread through interconnected networks and institutions. Consequently, understanding the transformation of international order requires analytical approaches capable of capturing these interactions and explaining their systemic implications.

Despite extensive scholarship on international order and global change, existing theories of international relations generally address crises separately. Realism emphasizes power distribution and strategic competition, liberalism focuses on institutions and cooperation, while constructivism highlights norms and identities. Although these approaches provide important insights, they tend to assume relatively linear causal relationships and often examine crises individually rather than as interconnected phenomena.

The growing overlap between geopolitical rivalry, pandemics, environmental degradation, technological disruption, and economic fragmentation exposes the limitations of conventional approaches. Existing frameworks provide valuable

explanations of particular dimensions of instability but offer limited understanding of how multiple crises interact and produce systemic transformations. Consequently, there remains a theoretical gap concerning the mechanisms through which simultaneous and mutually reinforcing crises reshape international order.

This limitation becomes increasingly evident in a world characterized by interdependence and rapid transmission of shocks. Events that originate in one domain frequently generate unexpected consequences in other areas, producing nonlinear outcomes that traditional frameworks struggle to explain. Therefore, there is a need for a broader analytical perspective capable of integrating the interactions among multiple crises and their implications for international order.

Against this background, the article seeks to answer the following central question:

How does polycrisis transform international order, and how can systemic complexity provide a framework for understanding this transformation?

Several subsidiary questions emerge from this inquiry:

- Why are existing approaches insufficient for explaining interconnected crises?
- What insights can complexity theory provide for understanding systemic transformations?
- Through which mechanisms do multiple crises interact and reshape international order?
- How do nonlinear dynamics and adaptive responses influence patterns of global governance and strategic competition?

The study pursues four main objectives. *First*, it seeks to conceptualize polycrisis and identify its principal characteristics. *Second*, it evaluates the explanatory capacity of existing theories of international relations in understanding interconnected crises and their limitations. *Third*, it introduces complexity theory and systems thinking as analytical foundations for examining nonlinear interactions and systemic adaptation. *Finally*, the article develops a Systemic Complexity Framework that explains how multiple crises interact and contribute to the transformation of international order.

This article argues that polycrisis should be understood not as a temporary accumulation of unrelated disruptions but as a systemic condition characterized by interconnected crises, feedback loops, and nonlinear interactions. Consequently, international order should be viewed as a complex adaptive system rather than as a stable structure governed by linear causality.

Existing approaches remain valuable, yet they are often insufficient to explain the multidimensional nature of contemporary transformations. The interaction among geopolitical, economic, technological, environmental, and health crises generates outcomes that cannot be fully understood through isolated analyses. Therefore, a broader perspective is required to capture the complexity of these dynamics.

The article contributes to the literature in three ways. First, it bridges the emerging concept of polycrisis with complexity theory and international relations scholarship. Second, it challenges linear approaches to systemic change and highlights the importance of interdependence and feedback mechanisms. Third, it proposes a Systemic Complexity Framework that provides a more comprehensive explanation of how international order evolves under conditions of persistent uncertainty and interconnected crises.

Methodology

Methodologically, this article adopts a qualitative theory-building approach based on conceptual analysis and analytical synthesis. Rather than testing a specific hypothesis, the study aims to construct a theoretical framework capable of explaining the relationship between polycrisis and transformations in international order.

The analysis combines three complementary approaches. First, conceptual analysis is employed to examine the evolution and characteristics of the concept of polycrisis. Second, insights from complexity theory and systems thinking are used to identify the mechanisms through which interconnected crises generate systemic change. Third, process tracing and illustrative cases—including the COVID-19 pandemic, the Russia-Ukraine war, climate-related disruptions, and technological competition—are utilized to demonstrate the empirical relevance of the proposed framework.

By combining conceptual analysis with illustrative evidence, the study seeks to provide an integrated understanding of contemporary transformations and contribute to theory-building in international relations.

Conceptualizing Polycrisis

The emergence of multiple and overlapping crises has stimulated renewed interest in concepts capable of capturing the complexity of contemporary global transformations. While crises have always been part of international politics, recent developments suggest that their nature has changed significantly. Economic instability, pandemics, climate change, geopolitical rivalry, technological disruptions, and energy insecurity increasingly interact rather than occur independently. Consequently, understanding the transformation of international order requires a conceptual framework that moves beyond isolated explanations and addresses the interconnected character of contemporary challenges. In this context, the concept of polycrisis has emerged as an important analytical tool for understanding how different crises reinforce one another and produce systemic consequences.

Origins and Evolution of the Concept

Although the concept of polycrisis has gained prominence only in recent years, its intellectual roots can be traced to earlier debates in systems thinking and complexity studies. Edgar Morin was among the first scholars to emphasize that modern societies are characterized by interconnected forms of uncertainty and complexity rather than by isolated problems. According to Morin (2008), contemporary systems should be understood as dynamic wholes in which interactions between different components generate emergent outcomes that cannot be reduced to linear causal relationships.

Building on these insights, recent discussions have revived the concept of polycrisis to explain the convergence of multiple crises in the twenty-first century. Adam Tooze (2022) popularized the term by arguing that contemporary disruptions are not merely simultaneous but mutually reinforcing. Rather than viewing the pandemic, geopolitical conflicts, climate change, inflation, and supply-chain disruptions as separate phenomena, Tooze emphasized that these crises interact through feedback mechanisms

that amplify vulnerabilities and create cascading consequences across sectors and regions.

The growing relevance of the concept reflects broader transformations in the international system. Increasing interdependence, globalization, digital connectivity, and complex supply chains have created new channels through which shocks spread rapidly. Consequently, the contemporary international order is increasingly characterized by overlapping disruptions that challenge conventional approaches based on isolated crisis management. This shift from discrete crises to interconnected crises represents one of the defining features of the twenty-first century.

Definitions of Polycrisis

Despite its growing popularity, there is no universally accepted definition of polycrisis. Existing interpretations converge on the idea that polycrisis involves interactions among multiple crises whose combined effects exceed the sum of their individual consequences.

Tooze (2022) defines polycrisis as a situation in which different crises become intertwined in ways that make their overall impact greater than the effect of each crisis considered separately. Homer-Dixon et al. (2022) similarly emphasize that interconnected crises generate cascading failures through feedback loops and systemic vulnerabilities. From a complexity perspective, polycrisis can be understood as a condition characterized by nonlinear interactions, uncertainty, and emergent outcomes.

Unlike traditional understandings that focus on isolated disruptions, the concept of polycrisis highlights the interdependence of crises and the dynamic relationships among them. This perspective shifts attention from individual events to the mechanisms linking different domains, thereby providing a more comprehensive understanding of contemporary transformations.

Before examining the characteristics of polycrisis, it is useful to summarize the main definitions proposed in the literature.

Table 1. Definitions and Characteristics of Polycrisis

Author	Definition	Key Elements
Morin (2008)	Complex interactions among multiple sources of uncertainty	Complexity, interdependence
Tooze (2022)	Interconnected crises whose combined impact exceeds individual effects	Interaction, amplification
Homer-Dixon et al. (2022)	Cascading failures across interconnected systems	Feedback loops, systemic vulnerabilities
Lawrence et al. (2024)	Simultaneous crises producing nonlinear and unpredictable outcomes	Nonlinearity, uncertainty

Table 1 illustrates that despite differences in terminology; most definitions emphasize interactions rather than the mere coexistence of crises. Interdependence, feedback mechanisms, and uncertainty appear as recurring themes across the literature,

suggesting that polycrisis should be understood primarily as a systemic phenomenon rather than as a collection of independent disruptions.

Characteristics of Polycrisis

Several characteristics distinguish polycrisis from conventional understandings of crises.

First, polycrisis is characterized by interdependence. Political, economic, environmental, technological, and health systems are increasingly connected, allowing disturbances in one area to affect others. As a result, local shocks can generate global consequences through interconnected networks.

Second, polycrisis exhibits cascading effects. Crises rarely remain confined to their original domains. Instead, disruptions spread across sectors and regions, producing secondary and tertiary consequences that are often difficult to predict. The COVID-19 pandemic, for example, evolved from a public health crisis into a broader economic, social, and geopolitical challenge.

Third, feedback loops constitute a central feature of polycrisis. Responses to one crisis may unintentionally intensify other problems. Economic sanctions, for instance, may influence energy markets, which in turn affect inflation and food security. Such interactions create self-reinforcing dynamics that complicate policy responses.

Fourth, polycrisis is characterized by nonlinearity. Changes within complex systems do not necessarily produce proportional outcomes. Relatively small disturbances may trigger major systemic consequences, while large interventions sometimes generate only limited effects. This feature challenges conventional assumptions based on linear causality.

Finally, uncertainty represents a defining characteristic of polycrisis. Because interactions among crises generate emergent outcomes, predicting the trajectory of systemic transformations becomes increasingly difficult. Consequently, policymakers and institutions often operate under conditions of incomplete information and heightened unpredictability.

Taken together, these characteristics suggest that polycrisis represents more than the coexistence of several crises. Rather, it reflects a systemic condition in which interconnected disruptions, nonlinear dynamics, and adaptive responses continuously reshape the international environment. Understanding this condition requires analytical approaches capable of capturing complexity and interdependence, a task that will be addressed through the lens of international relations theory in the following section.

Existing Approaches to International Order

Before developing a Systemic Complexity Framework, it is necessary to examine how the major traditions of international relations have conceptualized international order and systemic change. Realism, liberalism, constructivism, and international political economy have each provided valuable explanations for the sources of order and instability. Nevertheless, these approaches emerged largely within analytical contexts that assumed relatively linear causal relationships and treated crises as distinct phenomena. While they remain indispensable for understanding particular dimensions

of world politics, their ability to explain the interactions among multiple and simultaneous crises remains limited. Reviewing these approaches therefore helps identify the theoretical gap that justifies the development of a complexity-based perspective.

Realism has traditionally viewed international order through the lens of power distribution and competition among states. Classical and structural realists argue that the anarchic nature of the international system compels states to pursue survival and security, making shifts in relative capabilities the principal drivers of systemic change. According to Waltz (1979), transformations in international order occur primarily through changes in the balance of power and the emergence of new configurations of polarity.

Contemporary geopolitical developments have reinforced the relevance of realist arguments. The intensification of strategic competition between the United States and China, the return of great power rivalry, and the erosion of the post-Cold War unipolar moment have renewed debates concerning multipolarity and systemic transition. Recent studies emphasize that the contemporary international system is increasingly characterized by fragmented multipolarity rather than stable bipolar or unipolar arrangements (Farag 2026d).

Despite its explanatory strengths, realism tends to prioritize material power and security competition while providing limited explanations for the interactions among health, environmental, technological, and economic crises. Consequently, it struggles to account for the multidimensional character of contemporary transformations.

Liberal approaches emphasize institutions, interdependence, and cooperation as the foundations of international order. From this perspective, international organizations, regimes, and economic interdependence reduce uncertainty and facilitate collective action. Liberal scholars argue that institutions mitigate conflict by promoting transparency and establishing mechanisms for cooperation (Keohane and Nye 1977).

Globalization and economic interdependence have undoubtedly strengthened institutional linkages among states. However, recent crises have exposed the vulnerabilities embedded within highly interconnected systems. The COVID-19 pandemic, disruptions in supply chains, and geopolitical tensions demonstrated that interdependence can generate both cooperation and fragility. Instead of producing stability alone, interconnectedness may amplify shocks and transmit crises across sectors and regions.

Although liberalism recognizes interdependence, it often assumes that institutions can effectively manage disruptions. Such assumptions become problematic under conditions characterized by multiple and interacting crises, where uncertainty and nonlinear effects complicate collective responses.

Constructivism shifts attention from material capabilities to the role of ideas, identities, norms, and social interactions. According to constructivist scholars, international order is socially constructed and continuously shaped through shared understandings and normative practices (Wendt 1999).

This perspective provides important insights into how perceptions and identities influence international politics. Competing narratives concerning globalization, sovereignty, democracy, and security affect state behavior and contribute to the

emergence of new patterns of cooperation and rivalry. Moreover, the diffusion of information technologies and digital media has increased the importance of narratives and ideational competition.

Nevertheless, constructivism pays relatively limited attention to the structural interactions among crises and the mechanisms through which disruptions spread across interconnected systems. While it explains how actors interpret crises, it offers fewer tools for understanding nonlinear systemic dynamics.

International Political Economy (IPE) emphasizes the interaction between political authority and economic processes. Scholars in this tradition examine how globalization, production networks, financial flows, and resource competition influence international order. Recent studies have highlighted the increasing significance of geoeconomics, technological competition, and resource politics in shaping contemporary transformations.

The growing importance of energy security, supply chains, and critical resources illustrates the relevance of IPE perspectives. Competition over strategic resources, technological standards, and economic influence increasingly intersects with geopolitical rivalry and security concerns (Edmond, Forku, and Farag 2025). Moreover, resource interdependence creates channels through which disruptions in one domain rapidly affect others.

Although IPE recognizes the interaction between economics and politics, many analyses remain focused on particular sectors and do not fully address the multidimensional interactions among environmental, technological, health, and geopolitical crises.

Before assessing the limitations of these approaches, Table 2 summarizes their major strengths and weaknesses.

Table 2. Strengths and Limitations of Existing IR Theories

Approach	Main Focus	Strengths	Limitations
Realism	Power and security	Explains strategic competition and polarity shifts	Underestimates interconnected crises and non-state dynamics
Liberalism	Institutions and interdependence	Explains cooperation and global governance	Assumes manageable interdependence and linear adaptation
Constructivism	Ideas, norms, identities	Explains narratives and social change	Limited treatment of systemic interactions
International Political Economy	Political-economic relations	Explains globalization and resource competition	Often sector-specific and insufficiently holistic

Table 2 demonstrates that each theoretical tradition contributes important insights into international order. However, their analytical focus tends to privilege specific dimensions of global politics rather than the interactions among multiple crises. As a result, contemporary transformations require a broader perspective capable of integrating insights from different traditions while accounting for complexity and interdependence.

Despite their analytical value, existing approaches share several limitations when confronted with conditions of polycrisis. *First*, they generally rely on assumptions of linear causality. Most theories explain systemic change through relatively straightforward relationships between causes and outcomes. However, contemporary crises often generate nonlinear effects in which small disturbances produce disproportionate consequences. *Second*, traditional approaches tend to focus on individual crises rather than simultaneous and interconnected disruptions. Security, economics, technology, climate change, and public health are frequently treated as separate analytical domains despite their growing interdependence. *Third*, most theories retain state-centric assumptions that understate the role of networks, multinational corporations, technological platforms, and transnational actors. Increasing interconnectedness has transformed the sources of power and vulnerability, making state-centered explanations insufficient for understanding systemic complexity.

Finally, existing approaches offer limited explanations for feedback loops, cascading effects, and adaptive processes that characterize contemporary transformations. Consequently, while realism, liberalism, constructivism, and international political economy remain essential components of international relations theory, they are individually insufficient to explain the multidimensional and interconnected nature of polycrisis.

These limitations suggest the need for an alternative perspective capable of integrating interactions among crises and capturing the dynamic processes through which international order evolves. Complexity theory and systems thinking provide such a foundation and therefore constitute the focus of the next section.

Complexity Theory and Systems Thinking

The limitations of conventional approaches to international order suggest the need for analytical perspectives capable of explaining interactions among multiple crises and their systemic consequences. Complexity theory and systems thinking provide such a foundation by emphasizing interdependence, nonlinearity, adaptation, and emergence. Rather than treating international politics as a collection of isolated components governed by linear causal relationships, these approaches view the international system as a dynamic and evolving network characterized by feedback mechanisms and continuous interactions. Consequently, complexity theory offers a useful framework for understanding how contemporary polycrisis contributes to the transformation of international order.

Complexity theory emerged from interdisciplinary research in mathematics, biology, physics, and social sciences. Unlike reductionist approaches that seek to explain phenomena through isolated variables, complexity theory emphasizes relationships, interactions, and emergent properties. Morin (2008) argues that complex systems cannot be understood merely by analyzing their individual components because interactions among these components generate outcomes that transcend the characteristics of each part.

Similarly, complexity approaches reject assumptions of equilibrium and predictability. Systems evolve through nonlinear processes and often exhibit unexpected patterns of adaptation. Such perspectives have increasingly influenced

political science and public policy studies, particularly in contexts characterized by uncertainty and interdependence (Cairney 2012).

In international relations, complexity theory challenges conventional assumptions regarding stability and equilibrium by emphasizing continuous change and dynamic interactions. Contemporary global politics increasingly reflects these characteristics, making complexity theory particularly relevant for understanding systemic transformations.

One of the central concepts within complexity theory is that of complex adaptive systems. Such systems consist of multiple interconnected actors that continuously interact and adjust their behavior in response to changing conditions. Adaptation occurs not through centralized control but through decentralized interactions among system components (Holland 1992).

From this perspective, international order can be viewed as a complex adaptive system composed of states, international organizations, corporations, technological networks, and transnational actors. These actors interact across multiple domains, including security, economics, technology, health, and the environment. Their interactions generate outcomes that are often difficult to anticipate and cannot be reduced to the intentions of individual actors.

Recent transformations associated with fragmented multipolarity further reinforce this interpretation. The contemporary international system is characterized by multiple centers of influence and overlapping forms of cooperation and competition, producing patterns of adaptation that extend beyond traditional state-centric frameworks (Frag 2026d).

Nonlinearity and Emergence

Nonlinearity represents one of the defining characteristics of complex systems. In linear systems, proportional relationships exist between causes and effects. In contrast, complex systems frequently produce outcomes that are disproportionate to their initial causes. Small events may trigger large systemic consequences, while major interventions sometimes generate only limited effects.

The COVID-19 pandemic provides an illustrative example. Initially emerging as a public health crisis, it rapidly evolved into an economic, political, and geopolitical challenge that affected global supply chains, inflation, labor markets, and international cooperation. These consequences were not fully predictable because they resulted from interactions among interconnected systems rather than from a single causal mechanism.

Complex systems also exhibit emergence. Emergent phenomena arise from interactions among individual actors but cannot be explained solely by examining those actors independently. Fragmented multipolarity itself can be understood as an emergent outcome resulting from the interaction of geopolitical competition, economic interdependence, technological rivalry, and institutional change (Frag 2026d).

Another fundamental characteristic of complex systems is the existence of feedback loops. Positive feedback mechanisms amplify changes and accelerate systemic transformations, whereas negative feedback mechanisms contribute to stabilization and adaptation. Contemporary crises increasingly demonstrate the importance of such mechanisms. Energy shortages may contribute to inflation, which in turn influences

social unrest and political instability. Likewise, geopolitical tensions can disrupt trade and technological cooperation, creating secondary effects that reinforce strategic competition. These interactions produce cascading effects that spread across sectors and geographical regions, often generating consequences beyond the original source of disruption (Homer-Dixon et al. 2022).

The interconnected nature of resource competition illustrates these dynamics. Competition over strategic resources and energy security increasingly affects political alignments, economic development, and international stability, producing feedback processes that influence multiple dimensions simultaneously (Edmond 2026). Before discussing resilience and adaptation, Figure 1 summarizes the key principles of systemic complexity that characterize contemporary international politics.

Figure 1. Key Principles of Systemic Complexity

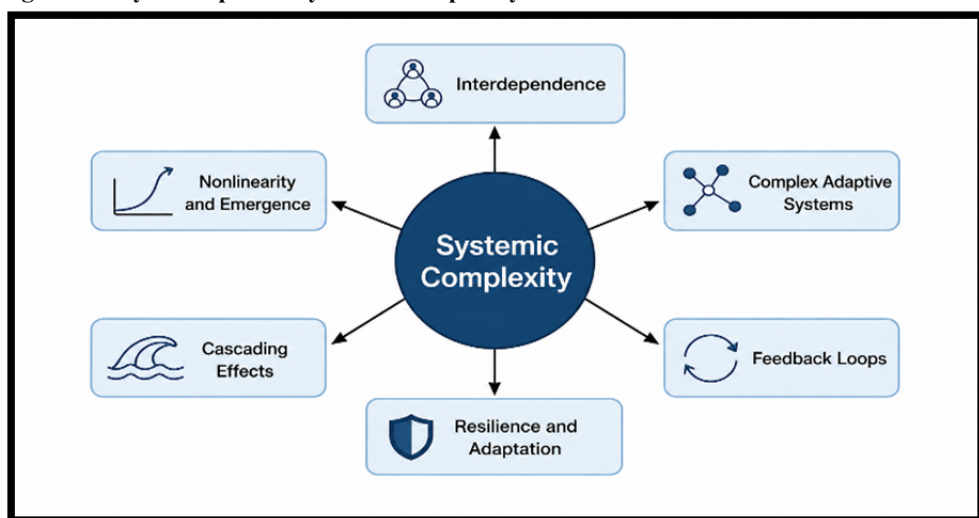


Figure 1 highlights that systemic transformations emerge from interactions among multiple mechanisms rather than from isolated events. These principles collectively explain why contemporary crises often produce outcomes that are difficult to predict and why international order increasingly behaves as a dynamic and adaptive system.

Resilience refers to the capacity of systems to absorb disturbances while maintaining their essential functions. Unlike traditional equilibrium models, complexity theory assumes that adaptation and transformation are continuous processes rather than exceptional events. Systems evolve through learning, experimentation, and institutional adjustments.

Recent developments demonstrate that international actors increasingly adopt adaptive strategies in response to uncertainty. States seek to diversify supply chains, enhance technological autonomy, strengthen energy security, and develop new forms of cooperation. These adaptive responses illustrate that resilience does not imply a return to previous conditions but rather the capacity to reorganize under changing circumstances. Moreover, adaptive processes contribute to broader transformations of

international order. As geopolitical rivalry intensifies and crises become increasingly interconnected, patterns of governance, alliances, and economic relations undergo continuous reconfiguration. Consequently, resilience and adaptation should be understood not merely as defensive mechanisms but as drivers of systemic change itself.

Taken together, complexity theory and systems thinking provide an analytical foundation capable of capturing the interactions, uncertainties, and adaptive processes that characterize contemporary international politics. By conceptualizing international order as a complex adaptive system, these approaches offer insights that conventional theories struggle to provide. Building upon these foundations, the next section develops the Systemic Complexity Framework, which constitutes the principal theoretical contribution of this article.

Having established the limitations of conventional theories and the analytical value of complexity theory, this section develops the central theoretical contribution of the article. Rather than understanding international order as a stable structure determined primarily by power distribution or institutional arrangements, this study conceptualizes it as a complex adaptive system characterized by continuous interactions among multiple actors, domains, and mechanisms. The proposed Systemic Complexity Framework seeks to explain how polycrisis generates transformation through interconnected and nonlinear processes. In doing so, the framework integrates insights from international relations, complexity theory, and recent studies on fragmented multipolarity, resource geopolitics, climate governance, and crisis management.

International Order as a Complex Adaptive System

The proposed framework rests on the assumption that international order behaves as a complex adaptive system. Unlike traditional approaches that emphasize equilibrium and predictability, complexity theory views systems as dynamic arrangements composed of interacting actors capable of adaptation and self-organization. Systemic outcomes emerge not from centralized control but from decentralized interactions among multiple actors operating under conditions of uncertainty (Holland 1992; Morin 2008).

This perspective is particularly relevant in the context of contemporary polycrisis. The interaction of geopolitical competition, economic interdependence, technological disruptions, climate change, and health emergencies has produced patterns of instability that cannot be adequately explained through isolated variables. Instead, these developments reveal the existence of interconnected processes that generate feedback loops and cascading effects across domains.

The transition from the post-Cold War unipolar order toward fragmented multipolarity further supports this interpretation. Contemporary systemic change does not follow a linear trajectory but emerges through interactions among geopolitical, technological, and economic factors. The growing fragmentation of power structures has created overlapping patterns of competition and cooperation, resulting in a more fluid and adaptive international system (Frag 2026c; Frag 2026d). Likewise, regional transformations increasingly reflect the influence of multiple interacting forces rather than the dominance of a single power center. This pattern is particularly visible in the

Middle East, where shifting alliances, regional competition, and external interventions have generated a more complex and fragmented regional order (Farag 2026c; Farag 2026d).

Consequently, international order should be understood as an evolving and adaptive system whose structure continuously changes through interactions among diverse actors and domains.

The Systemic Complexity Framework consists of three interdependent components: actors, domains, and mechanisms. Their interactions generate systemic outcomes that shape the evolution and transformation of international order.

International order is increasingly influenced by a broad spectrum of actors whose interactions transcend traditional state-centric assumptions.

States remain central actors in global politics. Nevertheless, their ability to address contemporary crises independently has diminished due to growing interdependence and external constraints. National responses increasingly depend on international cooperation, technological capabilities, and access to strategic resources.

Major powers continue to exercise disproportionate influence over systemic outcomes. However, contemporary competition extends beyond military capabilities and encompasses technology, finance, trade, and institutional influence. The emergence of fragmented multipolarity has intensified competition while simultaneously creating new patterns of selective cooperation (Farag 2026c; Farag 2026d).

International organizations play a critical role in managing crises and facilitating collective responses. However, geopolitical rivalries increasingly affect their effectiveness and legitimacy. The management of African crises illustrates how development assistance and humanitarian interventions are often intertwined with strategic and geopolitical considerations, revealing the complex relationship between governance and power politics (Edmond and Farag 2026).

Multinational corporations and technological firms have become major actors within global governance structures. Their influence extends across production networks, digital infrastructures, and technological innovation, granting them capacities that often rival those of states. Epistemic communities, advocacy networks, cities, and civil society organizations increasingly contribute to shaping agendas and mobilizing resources. Digital connectivity has further enhanced the role of networks in transmitting information and influencing policy responses.

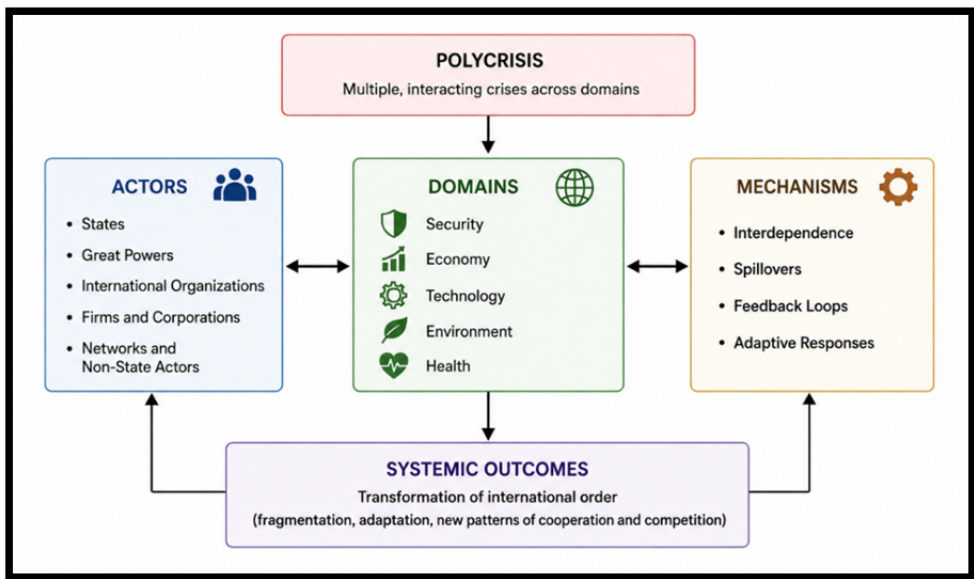
Polycrisis unfolds across several interconnected domains whose interactions produce systemic consequences. The security dimension encompasses interstate rivalry, regional conflicts, terrorism, migration, and asymmetric threats. Contemporary security challenges increasingly transcend traditional military concerns and involve multidimensional interactions between political, social, and economic factors. The Mediterranean region provides a clear example of how migration and asymmetric threats affect regional stability and security governance (Bibeau, Schriever, Bourbeau and Fournier 2025; Farag 2026c; Farag 2026d).

The economic dimension includes trade, financial systems, inflation, supply chains, and resource competition. Economic interdependence creates both opportunities and vulnerabilities, allowing disturbances to spread rapidly across sectors and regions.

Technology has emerged as a strategic domain influencing economic competitiveness, military capabilities, and global governance. Competition over artificial intelligence, digital infrastructure, and technological standards increasingly shapes international politics.

Climate change and environmental degradation have become major drivers of systemic instability. Environmental disruptions interact with migration, food insecurity, and economic vulnerability. Effective responses require multilevel governance and adaptive mechanisms capable of addressing interconnected challenges. Experiences from Egypt and Somalia demonstrate the importance of local adaptation and policy implementation in enhancing resilience under conditions of environmental uncertainty (Farang 2026c; Farang 2026d). Health crises constitute another essential dimension of polycrisis. The COVID-19 pandemic revealed how disruptions in public health rapidly evolve into economic and geopolitical crises through interconnected global networks. Before examining the mechanisms that connect actors and domains, Figure 2 illustrates the architecture of the Systemic Complexity Framework proposed in this study.

Figure 2. The Systemic Complexity Framework



The framework conceptualizes polycrisis as an initial condition that activates interactions among actors operating across multiple domains. Through mechanisms of interdependence, spillovers, feedback loops, and adaptive responses, these interactions generate systemic outcomes that transform international order (see Figure 2).

Interdependence creates channels through which shocks spread across political, economic, technological, and environmental systems. Globalization has increased connectivity but also amplified vulnerabilities. Disturbances originating in one domain frequently produce consequences in others. Resource competition, for example, affects economic development, security dynamics, and geopolitical alignments

simultaneously. The geopolitics of resources increasingly illustrates how economic and strategic considerations interact to shape contemporary international relations (Edmond 2026).

Complex systems are characterized by positive and negative feedback mechanisms that amplify or moderate change. Such feedback processes contribute to cascading effects and nonlinear outcomes, making prediction increasingly difficult. Actors continuously adjust strategies and institutions in response to changing circumstances. Adaptation influences governance structures, alliances, and patterns of cooperation. Consequently, resilience itself becomes a source of transformation rather than merely a mechanism for preserving existing arrangements.

The Systemic Complexity Framework

The Systemic Complexity Framework proposed in this article argues that international order is shaped by interactions among actors operating across interconnected domains through mechanisms characterized by interdependence, spillovers, feedback loops, and adaptive responses. Polycrisis serves as the catalyst that activates these processes and generates emergent outcomes.

Unlike conventional approaches that explain transformation through isolated variables, the framework recognizes that contemporary change is multidimensional and nonlinear. Structural transformations emerge from interactions rather than from predetermined trajectories. Consequently, international order should be understood as an evolving system whose behavior reflects the adaptive responses of diverse actors to interconnected crises.

By integrating insights from complexity theory, international relations, fragmented multipolarity, resource geopolitics, climate governance, and crisis management, the Systemic Complexity Framework provides a more comprehensive explanation of how polycrisis contributes to the transformation of international order. The following section examines the mechanisms through which these interactions produce fragmentation, resilience, and systemic reconfiguration.

Mechanisms of Transformation in International Order

Having established the Systemic Complexity Framework, it is now necessary to examine the processes through which polycrisis contributes to the transformation of international order. Rather than viewing systemic change as the result of isolated events or shifts in power distribution alone, the proposed framework emphasizes dynamic interactions among crises, actors, and domains. These interactions generate mechanisms that amplify disruptions, reshape institutions, and alter patterns of cooperation and competition. Contemporary transformations are therefore best understood as emergent outcomes arising from interconnected processes rather than predetermined trajectories.

One of the defining features of polycrisis is the tendency of disturbances originating in one domain to propagate across others. Unlike isolated crises, contemporary disruptions interact through interconnected systems, producing cascading effects that magnify vulnerabilities and create secondary and tertiary consequences. Such dynamics transform localized shocks into systemic challenges.

The COVID-19 pandemic illustrates this phenomenon. Initially emerging as a public health crisis, it rapidly disrupted global supply chains, generated inflationary pressures, intensified debt burdens, and altered geopolitical relations. Similarly, the Russia-Ukraine war produced consequences extending far beyond the battlefield, affecting energy markets, food security, and strategic alignments across regions. These examples demonstrate that crises increasingly spread through channels of interdependence and generate outcomes that cannot be understood through single-cause explanations (Homer-Dixon et al. 2022).

Climate change provides another illustration of cascading effects. Environmental degradation interacts with resource scarcity, migration pressures, and social instability, creating complex challenges that transcend national boundaries. Local climate governance and adaptation policies increasingly influence resilience at broader regional and international levels (Farang 2026a; Farang 2026b).

Consequently, the interaction among multiple crises transforms systemic vulnerabilities into a defining characteristic of contemporary international politics.

Nonlinear Dynamics

Traditional theories often assume relatively linear relationships between causes and outcomes. However, complex systems exhibit nonlinear dynamics in which small disturbances may produce disproportionate consequences. In such systems, outcomes are rarely predictable, and interactions among variables generate emergent effects that cannot be reduced to individual causes.

The contemporary transition from unipolarity to fragmented multipolarity demonstrates this nonlinearity. Systemic change has not followed a straightforward redistribution of power but has instead emerged through interactions among geopolitical competition, technological transformations, economic interdependence, and institutional fragmentation. These interconnected processes have generated a fluid and uncertain environment characterized by multiple centers of influence rather than a clearly defined polarity structure (Farang 2026c; Farang 2026d).

Similarly, strategic resource competition has increasingly produced nonlinear consequences. Energy disruptions influence inflation, inflation affects political stability, and political instability in turn shapes geopolitical alignments. Such interactions illustrate that contemporary transformations are characterized by feedback effects and unintended consequences rather than proportional relationships between causes and outcomes (Edmond 2026).

Therefore, understanding international order requires analytical frameworks capable of accounting for complexity, emergence, and uncertainty. As crises become increasingly interconnected, traditional governance mechanisms face growing limitations. Institutions originally designed to manage isolated problems often struggle to address multidimensional disruptions characterized by uncertainty and rapid change. Consequently, adaptation has become an essential feature of contemporary governance.

Adaptive governance refers to the capacity of institutions and actors to learn, adjust, and reorganize in response to changing conditions. Rather than relying solely on hierarchical decision-making, adaptive governance emphasizes flexibility, multilevel coordination, and continuous learning.

Recent experiences demonstrate the growing importance of such approaches. Climate adaptation policies increasingly require coordination between local and international actors. Evidence from Egypt and Somalia highlights the significance of multilevel governance and policy implementation in enhancing resilience under conditions of environmental uncertainty (Farang 2026c; Farang 2026d). Similarly, international responses to African crises reveal that governance mechanisms are increasingly shaped by the interaction between humanitarian objectives and geopolitical interests (Edmond and Farang 2026).

These developments indicate that governance structures themselves are evolving in response to polycrisis. Adaptation therefore becomes not only a mechanism of resilience but also a source of institutional transformation.

Fragmentation and Multipolarity

Another important mechanism through which polycrisis transforms international order is fragmentation. The interaction of geopolitical rivalry, technological competition, economic nationalism, and institutional distrust has weakened many assumptions associated with the liberal international order.

Rather than producing a stable multipolar system, contemporary transformations have generated fragmented multipolarity characterized by overlapping spheres of influence, selective cooperation, and increasing competition. Great powers compete simultaneously across military, technological, financial, and normative domains, creating patterns of rivalry that differ from previous polarity structures (Farang 2026c; Farang 2026d).

Regional systems have also experienced significant transformations. In the Middle East, changing power balances, shifting alliances, and external interventions have contributed to a more fluid and fragmented regional order. Structural transformations increasingly reflect interactions between global and regional dynamics rather than the dominance of a single actor or ideological framework (Farang 2026c; Farang 2026d).

Fragmentation is also evident in technological ecosystems, supply chains, and economic networks. The emergence of competing standards, sanctions regimes, and strategic decoupling reflects broader tendencies toward selective interdependence and differentiated globalization.

Thus, fragmentation should be understood not as evidence of systemic collapse but rather as an adaptive response to increasing complexity and uncertainty. Complex systems possess the capacity to adapt and reorganize in response to disturbances. Resilience does not imply a return to previous conditions but rather the ability to maintain functionality while undergoing transformation. Consequently, resilience and reconfiguration constitute essential mechanisms through which international order evolves.

Recent developments illustrate this process. States have sought to diversify supply chains, reduce strategic dependencies, and strengthen technological autonomy. Regional organizations have adapted to changing geopolitical conditions, while new forms of cooperation have emerged around energy security, critical minerals, and climate adaptation.

The geopolitics of resources further demonstrates how resilience and reconfiguration interact. Competition over strategic resources has accelerated efforts to develop alternative partnerships and strengthen regional cooperation mechanisms, thereby contributing to the emergence of new patterns of influence and interdependence (Edmond 2026).

Before concluding this section, Figure 3 summarizes the principal mechanisms through which polycrisis contributes to the transformation of international order.

Figure 3. Mechanisms Linking Polycrisis to International Order Transformation

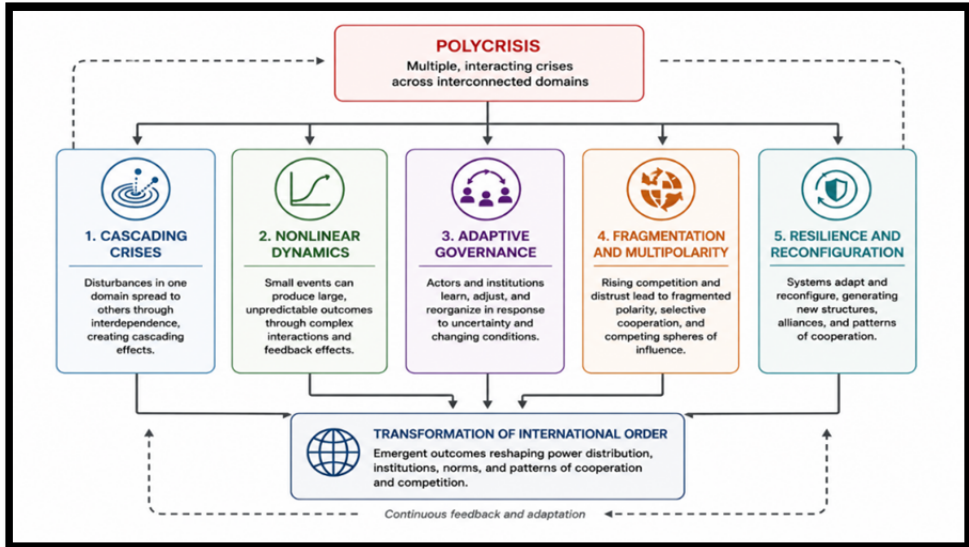


Figure 3 illustrates that polycrisis generates systemic transformation through interconnected mechanisms rather than through isolated causal pathways. Cascading crises, nonlinear dynamics, adaptive governance, fragmentation, and resilience interact continuously to reshape patterns of cooperation, competition, and governance.

Taken together, these mechanisms demonstrate that international order evolves through dynamic processes characterized by uncertainty and complexity. Transformation is therefore neither linear nor predetermined. Instead, it emerges from interactions among crises, actors, and institutions operating across interconnected domains. Understanding these mechanisms provides the foundation for examining empirical manifestations of polycrisis, which constitute the focus of the following section.

Illustrative Cases of Polycrisis

The theoretical framework developed in the preceding sections suggests that contemporary transformations in international order are driven not by isolated crises but by the interaction of multiple disruptions across interconnected domains. To demonstrate the explanatory utility of the Systemic Complexity Framework, this

section presents four illustrative examples of polycrisis. These examples are not intended as comprehensive comparative case studies but rather as empirical illustrations of how crises interact, generate cascading effects, and contribute to systemic transformation. Together, they demonstrate that contemporary challenges increasingly transcend sectoral boundaries and produce consequences that reshape patterns of governance, competition, and interdependence.

COVID-19 and Global Supply Chains

The COVID-19 pandemic represented one of the most significant manifestations of polycrisis in the twenty-first century. Although initially viewed as a public health emergency, the pandemic quickly evolved into a multidimensional crisis affecting economic production, international trade, labor markets, and geopolitical relations (Baldwin and Weder di Mauro 2020). Lockdowns and restrictions on mobility disrupted global supply chains and exposed the vulnerability of highly interconnected production networks. Shortages of semiconductors, medical equipment, and strategic commodities revealed the fragility of contemporary globalization and highlighted the risks associated with excessive dependence on geographically concentrated supply chains (Laborde, Martin, and Vos 2021).

The pandemic also accelerated structural trends that had emerged before 2020. Governments increasingly adopted policies aimed at strengthening resilience through reshoring, friend-shoring, and diversification strategies. At the same time, the crisis intensified debates concerning strategic autonomy and the balance between efficiency and security in global economic networks (Baldwin and Weder di Mauro 2020). Consequently, what began as a health crisis evolved into a broader challenge affecting economic governance, geopolitical competition, and technological development.

More importantly, the pandemic illustrated how crises originating in one domain can generate cascading effects across others. Health disruptions influenced trade, trade disruptions contributed to inflation, and inflation created political and social consequences. Such interactions provide a clear example of how contemporary crises produce systemic outcomes that extend far beyond their original context.

Russia–Ukraine War and Energy Security

The Russia-Ukraine war provides another illustration of polycrisis dynamics. Although the conflict emerged primarily as a geopolitical and security crisis, its effects rapidly extended into energy markets, food systems, inflation, and international trade (Yergin 2020). Sanctions imposed on Russia and disruptions in energy exports contributed to rising oil and gas prices, creating economic pressures that affected states far beyond the immediate theater of conflict.

The war also exposed the strategic implications of energy interdependence. European dependence on Russian energy transformed economic linkages into geopolitical vulnerabilities and accelerated efforts to diversify suppliers and invest in alternative energy sources (Yergin 2020). Simultaneously, interruptions in grain exports affected food security, particularly in developing countries dependent on

imports from Ukraine and Russia. Rising food prices and inflationary pressures generated additional political and social consequences across different regions. These developments demonstrate that contemporary conflicts generate cascading effects extending beyond traditional security concerns. The interaction between energy, economics, and geopolitics illustrates how disturbances in one domain can produce consequences throughout the international system, reinforcing the multidimensional character of polycrisis.

Climate Change and Food Security

Climate change represents one of the most persistent and complex dimensions of contemporary polycrisis. Rising temperatures, extreme weather events, droughts, and floods increasingly affect agricultural production and food systems, creating significant economic and social challenges (IPCC 2023). Environmental degradation interacts with migration, resource scarcity, and political instability, generating consequences that extend far beyond ecological concerns.

Food security has emerged as one of the clearest manifestations of these interactions. Changes in precipitation patterns and increasing climate variability threaten agricultural productivity and amplify vulnerabilities among developing countries. These pressures are further intensified by existing inequalities and weak institutional capacities, creating conditions that may contribute to social unrest and population displacement (IPCC 2023).

Unlike sudden crises, climate change unfolds gradually while interacting continuously with other sources of instability. Consequently, environmental challenges should not be viewed as isolated phenomena but rather as integral components of broader systemic transformations. The relationship between climate change and food security demonstrates how long-term environmental processes contribute to the complexity of contemporary international order.

US-China Technological Rivalry

Technological competition between the United States and China illustrates how innovation and digital infrastructure have become central arenas of strategic competition. Rivalry increasingly extends beyond military capabilities to encompass semiconductors, artificial intelligence, telecommunications, cyber capabilities, and digital governance (Allison 2017). Technological superiority has become closely associated with economic competitiveness and geopolitical influence, transforming innovation into a strategic asset.

Competition over technological leadership has generated important consequences for globalization and economic interdependence. Export controls, restrictions on semiconductor technologies, and investment limitations have contributed to the fragmentation of global technological ecosystems and accelerated tendencies toward selective decoupling (Farrell and Newman 2023). Competing technological standards and digital governance models have further reinforced divisions within the international system.

The growing strategic importance of technology demonstrates that economic, security, and technological dimensions are increasingly inseparable. As a result, technological rivalry has become a critical driver of systemic transformation and an important component of contemporary polycrisis.

Before concluding this section, Table 3 summarizes the interactions among the illustrative cases and highlights their broader implications for international order.

Table 3. Illustrative Cases of Polycrisis and Systemic Effects

Illustrative Case	Primary Domain	Interacting Domains	Major Systemic Effects
COVID-19 Pandemic	Health	Economy, Technology, Politics	Supply chain disruptions, inflation, strategic autonomy
Russia-Ukraine War	Security	Energy, Economy, Food Security	Energy transition, geopolitical realignment, inflation
Climate Change	Environment	Food Security, Migration, Economy	Resource scarcity, social instability, adaptation policies
US-China Rivalry	Technology	Security, Economy, Governance	Technological fragmentation, selective decoupling

Table 3 demonstrates that contemporary crises rarely remain confined to a single sector. Instead, interactions among health, security, economic, technological, and environmental domains generate systemic consequences that reshape patterns of cooperation, competition, and governance. These examples provide empirical support for the Systemic Complexity Framework developed in this article and illustrate how polycrisis contributes to the transformation of international order through interconnected mechanisms rather than isolated events.

The following section examines the broader implications of these transformations for international order, focusing on fragmented multipolarity, strategic competition, challenges to global governance, and emerging patterns of cooperation and rivalry.

Implications for International Order

The preceding analysis suggests that polycrisis is not merely a collection of simultaneous disruptions but a systemic condition capable of reshaping the foundations of international order. The interaction of geopolitical competition, economic interdependence, technological fragmentation, environmental pressures, and institutional challenges has generated patterns of transformation that cannot be adequately understood through conventional frameworks. Rather than leading to a clear transition toward a new stable order, these developments have produced a more fragmented, adaptive, and uncertain international environment. This section examines the broader implications of polycrisis for the evolution of international order and the changing patterns of global governance and strategic interaction.

From Liberal Order to Fragmented Multipolarity

The post-Cold War liberal international order was characterized by expectations of increasing globalization, institutional cooperation, and the predominance of a relatively

stable unipolar structure. However, recent developments have undermined many of these assumptions. Strategic rivalry, economic nationalism, technological competition, and geopolitical fragmentation have weakened the foundations of the liberal order and contributed to the emergence of a more complex and decentralized system (Ikenberry 2018).

Rather than producing a classical multipolar system, contemporary transformations have generated what may be described as fragmented multipolarity. In this environment, multiple centers of influence coexist without clear hierarchical arrangements, and patterns of cooperation and competition overlap across different domains (Farag 2026a; Farag 2026b). Power is increasingly exercised through economic leverage, technological capabilities, and control over strategic resources rather than through military capabilities alone.

This transformation is particularly evident in regional systems. In the Middle East, changing power balances and shifting alliances have generated a more fluid and fragmented regional order characterized by overlapping spheres of influence and selective partnerships (Farag 2026c). Similar patterns are observable in other regions where external powers, regional actors, and non-state entities interact within increasingly complex geopolitical environments.

Consequently, contemporary international order appears less as a coherent system governed by common rules and more as a flexible and fragmented structure characterized by differentiated forms of cooperation and competition.

Strategic Competition under Complexity

Polycrisis has altered the nature of strategic competition. Traditional understandings focused primarily on military capabilities and territorial rivalries. However, contemporary competition increasingly extends into economic, technological, financial, and informational domains. States seek to enhance resilience, secure access to critical resources, and strengthen technological autonomy in response to growing uncertainty (Farrell and Newman 2019).

Competition between major powers now involves control over digital infrastructure, supply chains, artificial intelligence, rare earth minerals, and energy systems. Such multidimensional rivalry creates complex patterns of interdependence in which competition and cooperation coexist simultaneously. Strategic relationships increasingly involve selective decoupling rather than complete disengagement.

The geopolitics of resources further illustrates this transformation. Access to strategic minerals, energy supplies, and critical infrastructure has become closely linked to national security and geopolitical influence. Resource competition increasingly shapes patterns of alliances, investment, and diplomatic engagement, reinforcing the multidimensional nature of strategic rivalry (Edmond 2026).

Under conditions of systemic complexity, strategic competition becomes less predictable and more adaptive. States continuously adjust their strategies in response to changing circumstances, generating dynamic interactions that reshape international order.

Challenges to Global Governance

Polycrisis has exposed important limitations in existing mechanisms of global governance. Institutions designed to address specific issues often struggle to cope with interconnected and multidimensional crises. Fragmentation among major powers and increasing geopolitical tensions have reduced the effectiveness of multilateral cooperation and complicated collective responses to global challenges (Hale, Held and Young 2013).

At the same time, governance itself has become increasingly politicized. Humanitarian assistance, development programs, and crisis management mechanisms are frequently influenced by geopolitical considerations. The experience of European engagement in African crises demonstrates how development objectives and strategic interests increasingly intersect, creating complex patterns of cooperation and competition (Edmond and Farag 2026).

Environmental governance provides another example of these challenges. Climate adaptation requires coordination among local, national, and international actors operating across multiple levels. Effective governance increasingly depends on flexibility, institutional learning, and adaptive capacities rather than rigid hierarchical structures (Farag 2026d).

These developments suggest that future governance arrangements are likely to become more decentralized and networked. Rather than relying exclusively on universal institutions, international cooperation may increasingly emerge through flexible coalitions and issue-specific partnerships.

New Patterns of Cooperation and Rivalry

Despite increasing fragmentation, polycrisis does not necessarily imply systemic collapse. Instead, contemporary transformations are producing new forms of cooperation and rivalry. States increasingly engage in selective partnerships based on specific interests and issue areas. Cooperation in climate governance, public health, and energy transitions may coexist with competition in technology, trade, and security.

Middle powers have also acquired greater significance within this evolving landscape. Rather than aligning exclusively with major powers, many states pursue flexible strategies aimed at maximizing autonomy and diversifying partnerships. Such behavior reflects the growing complexity of international relations and the decline of rigid bloc politics (Farag 2025).

Furthermore, adaptive forms of regionalism and minilateralism are becoming increasingly important. Smaller coalitions and functional arrangements often provide more flexible responses to specific challenges than universal institutions. These developments suggest that international order is evolving toward a more pluralistic and differentiated structure.

Before concluding, it is important to emphasize that the interaction of competition and cooperation constitutes one of the defining features of contemporary international politics. Polycrisis has not eliminated interdependence; rather, it has transformed its nature and generated new configurations of power and governance.

Taken together, these developments indicate that international order is entering a phase characterized by fragmented multipolarity, multidimensional strategic competition, adaptive governance, and differentiated patterns of cooperation. Understanding these transformations requires moving beyond traditional dichotomies and recognizing the complexity and interconnectedness that increasingly define world politics.

Theoretical Contributions

Beyond explaining contemporary transformations, this article seeks to contribute to ongoing theoretical debates in international relations by proposing an alternative framework for understanding systemic change under conditions of polycrisis. Existing approaches have generated important insights into the sources of order and instability, yet they often treat crises as separate phenomena and assume relatively linear patterns of causality. By integrating insights from complexity theory and international relations, the Systemic Complexity Framework developed in this study offers a broader perspective capable of capturing the interconnected and adaptive nature of contemporary transformations.

The theoretical contributions of this study are organized around four interrelated dimensions. First, the article conceptualizes polycrisis as a systemic condition rather than a temporary accumulation of disruptions. Second, it establishes a dialogue between complexity theory and international relations scholarship. Third, it challenges conventional linear models of systemic change. Finally, it advances a complexity-based approach to the study of international order and global transformations.

Polycrisis as a Systemic Condition

One of the principal contributions of this article is the reconceptualization of polycrisis as a systemic condition rather than a collection of independent crises. Existing analyses frequently interpret crises as temporary disturbances that interrupt otherwise stable patterns of international interaction. Such interpretations implicitly assume that systems eventually return to equilibrium once crises subside.

This article advances a different perspective. Polycrisis is understood as a persistent condition characterized by the interaction of multiple crises across interconnected domains. Under these conditions, instability itself becomes a structural feature of international politics rather than an exceptional event. Economic disruptions, geopolitical rivalry, technological competition, environmental pressures, and health emergencies interact continuously, producing cascading effects and reinforcing systemic vulnerabilities (Tooze 2022).

Consequently, the transformation of international order should not be interpreted as the result of isolated events but rather as the outcome of continuous interactions among overlapping crises. This perspective shifts attention from individual crises toward the mechanisms that connect them and generate systemic change.

Complexity and International Relations Theory

A second contribution of this study lies in its effort to establish a stronger dialogue between complexity theory and international relations scholarship. Although complexity approaches have influenced various disciplines, their integration into mainstream international relations remains limited. Traditional theories continue to focus primarily on power distributions, institutions, and identities, often overlooking the interactions among multiple domains and actors.

By conceptualizing international order as a complex adaptive system, this article extends existing theoretical approaches and highlights the importance of interdependence, emergence, adaptation, and feedback mechanisms. Such an approach complements rather than replaces established theories. Realism continues to provide insights into strategic competition, liberalism explains institutional cooperation, and constructivism illuminates the role of ideas and norms. However, complexity theory offers an overarching framework capable of integrating these perspectives within a broader understanding of systemic interactions (Morin 2008).

The concept of fragmented multipolarity further illustrates the relevance of this perspective. Contemporary transformations emerge through interactions among geopolitical, economic, technological, and institutional factors rather than through changes in material capabilities alone (Farag 2026a). Thus, complexity theory provides a more comprehensive lens for analyzing contemporary international politics.

Beyond Linear Models

A third contribution concerns the critique of linear approaches to systemic change. Much of the existing literature assumes relatively proportional relationships between causes and outcomes. Structural transformations are frequently explained through singular variables such as shifts in polarity, institutional decline, or economic crises.

However, contemporary developments increasingly reveal the limitations of such assumptions. The COVID-19 pandemic, technological rivalry, climate change, and resource competition demonstrate that small disturbances may generate disproportionate consequences through cascading effects and feedback loops. Conversely, large interventions do not always produce predictable outcomes. These characteristics indicate that international politics is shaped by nonlinear processes and emergent phenomena rather than by straightforward causal relationships (Holland 1992).

The Systemic Complexity Framework therefore moves beyond reductionist explanations by emphasizing interactions, uncertainty, and adaptive processes. This approach provides greater analytical flexibility for understanding contemporary transformations and the multidimensional nature of international order.

Toward Complexity-Based International Analysis

The final contribution of this article is the development of a complexity-based approach to international analysis. Rather than focusing exclusively on states or single domains, the proposed framework incorporates multiple actors, interconnected domains, and dynamic mechanisms. States, international organizations, firms, and networks interact across security, economic, technological, environmental, and health

dimensions through processes characterized by interdependence, spillovers, feedback loops, and adaptation.

This perspective encourages a shift from equilibrium-based models toward approaches that emphasize resilience, uncertainty, and systemic interactions. It also broadens the understanding of power by recognizing the importance of technological capabilities, resource networks, governance arrangements, and adaptive capacities. Resource geopolitics, climate governance, and strategic competition increasingly demonstrate that power is exercised through complex channels rather than through military capabilities alone (Edmond 2026).

More broadly, the framework contributes to emerging debates concerning the transformation of international order under fragmented multipolarity. Instead of viewing systemic change as a transition from one stable order to another, complexity-based analysis emphasizes continuous adaptation and reconfiguration (Farag 2026a). Such an approach is better suited to understanding the uncertainty and fluidity that characterize contemporary global politics.

Taken together, these contributions suggest that international order should be understood not as a fixed structure but as an evolving complex adaptive system. Polycrisis, therefore, represents more than a series of concurrent disruptions; it constitutes a systemic condition that continuously reshapes patterns of cooperation, competition, and governance. By integrating complexity theory with international relations scholarship, the Systemic Complexity Framework offers a new analytical lens for examining the transformations of the twenty-first century and provides a foundation for future theoretical and empirical research.

Limitations and Future Research

While the Systemic Complexity Framework developed in this article offers a broader perspective for understanding the transformation of international order under conditions of polycrisis, several limitations should be acknowledged. Recognizing these limitations is important not only for evaluating the scope of the proposed framework but also for identifying promising directions for future research.

First, this study is primarily conceptual and theory-building in nature. The framework has been developed through analytical synthesis and qualitative reasoning rather than through systematic empirical testing. Although illustrative cases have been used to demonstrate its explanatory relevance, the relationships among actors, domains, and mechanisms require further empirical validation. Future studies could employ comparative case studies, longitudinal analyses, and mixed-method approaches to assess the explanatory power of the framework across different contexts and time periods (George and Bennett 2005).

Second, the framework emphasizes interactions and complexity but does not provide a quantitative assessment of the intensity and direction of these interactions. The dynamic relationships among security, economics, technology, health, and environmental domains are inherently difficult to measure. Consequently, future research could utilize network analysis and complexity metrics to map patterns of interdependence and identify critical nodes through which crises propagate. Such

approaches would make it possible to examine cascading effects and feedback mechanisms more systematically (Newman 2018).

Third, the article focuses primarily on global-level transformations and provides only illustrative references to regional dynamics. Since the effects of polycrisis vary across geographical and political contexts, comparative regional analyses represent an important avenue for future investigation. Regional orders in the Middle East, Africa, Europe, and the Indo-Pacific are shaped by distinct historical experiences and institutional arrangements, suggesting that the mechanisms of systemic transformation may differ across regions. Comparative studies could therefore contribute to a more nuanced understanding of how complexity and polycrisis influence international order under different conditions (Frag 2026a; Frag 2026d).

Fourth, the framework treats adaptation and resilience as central mechanisms of systemic transformation but does not fully explore the role of agency and decision-making processes. Future research may benefit from examining how leaders, institutions, and non-state actors respond to uncertainty and how these responses shape systemic outcomes. Such analyses could provide greater insight into the relationship between individual choices and emergent patterns of change.

Finally, advances in computational social science create new opportunities for extending complexity-based approaches in international relations. Agent-based modeling, simulation techniques, and machine learning tools could be employed to explore nonlinear interactions and emergent behaviors within complex international systems (Miller and Page 2007). These approaches would allow researchers to investigate scenarios that are difficult to capture through conventional analytical methods and contribute to the development of a more rigorous complexity-oriented research agenda.

Despite these limitations, the present study provides a foundation for integrating complexity theory and international relations scholarship. Future research combining conceptual innovation with empirical and computational approaches has the potential to enhance our understanding of polycrisis and its implications for the evolution of international order. Rather than representing a final theoretical statement, the Systemic Complexity Framework proposed in this article should be viewed as a starting point for further research into the increasingly interconnected and uncertain dynamics of global politics.

Conclusion and discussion

This article has argued that the contemporary international system is increasingly shaped by the interaction of multiple and interconnected crises whose combined effects transcend conventional analytical boundaries. Rather than representing isolated disturbances, geopolitical competition, pandemics, climate change, technological fragmentation, energy insecurity, and economic disruptions interact through complex mechanisms that amplify vulnerabilities and generate systemic consequences. These developments suggest that the concept of polycrisis captures an emerging condition of international politics characterized by persistent uncertainty, nonlinear dynamics, and continuous adaptation.

The analysis has shown that existing approaches in international relations provide important insights into particular dimensions of international order but encounter limitations when confronted with the multidimensional nature of contemporary transformations. Realism explains power competition, liberalism highlights institutions and interdependence, constructivism emphasizes ideas and identities, and international political economy illuminates the relationship between politics and economics. However, none of these approaches alone adequately captures the interactions among simultaneous crises and the mechanisms through which they collectively reshape international order.

To address this theoretical gap, the article introduced complexity theory and systems thinking as analytical foundations for understanding contemporary transformations. Building upon these insights, it proposed a Systemic Complexity Framework that conceptualizes international order as a complex adaptive system composed of multiple actors operating across interconnected domains through mechanisms characterized by interdependence, spillovers, feedback loops, and adaptive responses. From this perspective, systemic change emerges not through isolated events or predetermined trajectories but through dynamic interactions among political, economic, technological, environmental, and health-related processes.

The framework developed in this study further demonstrated that contemporary transformations are driven by several interconnected mechanisms. Cascading crises, nonlinear dynamics, adaptive governance, fragmentation, and resilience contribute to the continuous reconfiguration of international order. The illustrative cases examined in this article, including the COVID-19 pandemic, the Russia-Ukraine war, climate change, and US-China technological rivalry, provided empirical examples of how crises interact and generate consequences extending across multiple domains. These cases highlighted the growing inadequacy of compartmentalized approaches and reinforced the importance of understanding international politics through the lens of complexity.

One of the central arguments advanced in this article is that polycrisis should be understood as a systemic condition rather than as a temporary accumulation of unrelated disruptions. Contemporary instability no longer represents an exceptional deviation from equilibrium but increasingly constitutes a defining characteristic of international politics. Under conditions of fragmented multipolarity, interactions among multiple centers of power, technological competition, resource geopolitics, and environmental challenges generate patterns of cooperation and rivalry that are fluid, adaptive, and often unpredictable. Consequently, international order should be viewed not as a fixed structure but as an evolving and dynamic system whose behavior reflects continuous processes of adaptation and reconfiguration.

The article also contributes to the growing dialogue between complexity theory and international relations scholarship. By integrating concepts such as emergence, interdependence, and adaptive systems into the study of international order, the proposed framework provides an alternative perspective capable of complementing existing theoretical traditions. Rather than replacing established approaches, complexity-based analysis offers a broader lens through which the interactions among

crises and the multidimensional nature of systemic transformation can be better understood.

Ultimately, the transformation of international order in the twenty-first century cannot be adequately explained through linear models or isolated variables. Contemporary global politics increasingly resembles a complex adaptive system characterized by interconnected crises, nonlinear interactions, and evolving patterns of governance. The Systemic Complexity Framework proposed in this article offers a new analytical lens for understanding these dynamics and provides a foundation for future research on polycrisis and the changing architecture of international order. As uncertainty and interdependence continue to intensify, complexity-based approaches are likely to become increasingly important for explaining the evolving nature of global politics and the challenges confronting international society.

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Ethics Statement

The author affirms that this research was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The author declares no conflict of interest.

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GEOPOLITICAL RIVALRY AND ECONOMIC VULNERABILITY IN AFRICA: ASSESSING THE IMPACT OF U.S.-IRAN TENSIONS ON TRADE, ENERGY MARKETS, AND MACROECONOMIC STABILITY

YINKA IBRAHIM AGBEYINKA * 
Walter Sisulu University

Abstract

This study analyzes the impact of geopolitical tensions between the U.S. and Iran on Africa's political economy and security architecture, focusing specifically on transmission mechanisms, security implications, and response strategies. Employing a comprehensive approach that combines quantitative analysis of macroeconomic indicators with a qualitative assessment of security dynamics and policy measures, the study identifies oil price volatility as the primary channel through which these geopolitical tensions affect African economies. The findings indicate that oil-exporting nations face revenue instability, while oil-importing countries experience rising inflation and fiscal pressure. Trade disruptions and financial market volatility exacerbate these effects, constraining economic resilience. In the security realm, the study identifies signs of increasing militarization in strategically important regions—such as the Red Sea basin—and the proliferation of “proxy actors,” which heighten instability in vulnerable states. Despite their development, regional security structures face significant resource and institutional constraints in addressing these complex challenges. In response, African states employ a mix of diplomatic maneuvering, economic adaptation, and security cooperation, though the effectiveness of these strategies varies according to specific contexts. The study concludes that while Africa remains structurally vulnerable to external geopolitical shocks, mechanisms for resilience and strategic adaptation are beginning to emerge. The authors recommend accelerating economic diversification, regional integration, and security cooperation to enhance the continent's capacity to withstand challenges stemming from great-power rivalry.

Keywords: *geopolitical tensions, oil price volatility, political economy, security architecture, Africa, great power rivalry, United States, Iran.*

Introduction

The resurgence of great power rivalry in the twenty-first century has significantly reshaped global political and economic dynamics, with consequences extending far

* **Yinka Ibrahim Agbeyinka** is a Researcher of the Department of Accounting Science at Walter Sisulu University. Email: agbeyinkaibrahim.res@gmail.com. ORCID: <https://orcid.org/0009-0003-5835-2519>.



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beyond primary theatres of conflict. The intensifying tensions between the United States and Iran represent a critical axis of this evolving geopolitical contest, influencing global stability and redefining patterns of international engagement. As Zarnadze and Hongson (2026) contend, strategic competition plays a central role in shaping national interests and global alignments, often extending its effects to peripheral regions. Africa, characterized by structural economic dependencies and institutional fragilities, is particularly exposed to such external pressures (Shah et al. 2026). Despite its geographical distance from the Middle East, the continent is increasingly entangled in the ripple effects of U.S.-Iran tensions, raising important questions about vulnerability, agency, and resilience in a shifting global order.

A major pathway through which U.S.-Iran geopolitical tensions affect Africa lies in the global political economy, particularly through oil price volatility and trade disruptions. Fluctuations in oil prices, often triggered by geopolitical crises, have far-reaching consequences for African economies, many of which are either heavily dependent on oil exports or vulnerable to import costs. Studies show that geopolitical shocks significantly influence crude oil price dynamics, thereby affecting macroeconomic stability (Sweidan and Elbahnasawy 2026; Liu 2025). In highly interconnected markets, such shocks are transmitted rapidly across regions, amplifying inflationary pressures and fiscal imbalances (Bellos, Golitsis and Emmanouilidis 2026; Vivoda, Matthews and Andresen 2025). However, while these studies provide global insights, there remains limited Africa-focused analysis that directly links U.S.-Iran tensions to specific economic outcomes on the continent, highlighting a critical gap this study seeks to address.

In addition to economic implications, U.S.-Iran rivalry has important consequences for Africa's evolving security architecture. Strategic regions such as the Red Sea and the Horn of Africa have become increasingly militarized due to their geopolitical significance and proximity to Middle Eastern conflicts.

Okafor-Yarwood and Onuoha (2023) highlight the strategic importance of key maritime chokepoints, where rising tensions can disrupt global trade and undermine security. Moreover, the presence of proxy actors and external military interests complicates an already fragile security landscape, particularly in regions such as Somalia and the Sahel (Raineri, Cissé and Berlingozzi 2025). Although Joseph (2024) notes efforts to adapt African peace and security mechanisms—including structures like the African Standby Force (Idahosa, Degterev and Ikhidero 2021)—there remains a lack of empirical research linking these processes directly to the geopolitical rivalry between the US and Iran.

Recent geopolitical escalations have further underscored the relevance of these dynamics for Africa's political and economic stability. Emerging analyses suggest that conflicts involving Iran generate global ripple effects, influencing trade routes, energy markets, and strategic alignments (Mensah 2023; UNDP 2026). Lebakeng (2023) argues that Africa is increasingly drawn into global power contests, often without adequate leverage to shape outcomes. Similarly, reports indicate that disruptions in Middle Eastern energy flows can significantly affect African consumer markets and development trajectories (UNCTAD 2025). Despite these insights, existing literature

tends to treat Africa as a passive recipient of global shocks, with limited attention to how specific geopolitical rivalries.

Against this backdrop, the first objective of this study is to examine how U.S.–Iran geopolitical tensions influence Africa’s political economy, particularly through oil price volatility, trade disruptions, and inflationary pressures. The second objective is to assess the implications of this rivalry for Africa’s security architecture, focusing on maritime insecurity, militarization of strategic regions such as the Red Sea and the Sahel, and the activities of proxy actors. The third objective is to evaluate the response strategies of African states and regional organizations, including diplomatic alignment, economic adaptation, and security cooperation mechanisms. While prior studies acknowledge Africa’s exposure to global shocks (Cilliers, Hughes and Moyer 2011), they rarely integrate these three dimensions within a single analytical framework, representing a key research gap addressed by this study.

This article proceeds as follows. The next section reviews the relevant literature on great power rivalry, geopolitical risk, and Africa’s vulnerability within the global system. The subsequent section outlines the methodological approach and analytical framework adopted for the study. This is followed by an empirical analysis divided into three parts, corresponding to the study’s objectives: political economy impacts, security implications, and response strategies. The final section discusses the findings in relation to existing scholarship and offers policy recommendations for African states and regional institutions. By providing a comprehensive and integrated analysis, this study contributes to a deeper understanding of Africa’s position within contemporary geopolitical rivalries and highlights pathways for enhancing resilience in an increasingly uncertain global environment.

Geopolitical Tensions, Oil Markets, and Africa’s Political Economy

A substantial body of literature has examined the relationship between geopolitical tensions and oil price dynamics, highlighting the central role of energy markets as a transmission channel for global shocks. Billah, Shaik, Hadhri and Balli (2025) demonstrate that oil price shocks significantly affect economic activity in emerging and developing economies, with implications for growth, inflation, and fiscal stability. Shang and Hamori (2024) further differentiate between oil-exporting and oil-importing countries, showing that the macroeconomic effects of price fluctuations vary considerably depending on a country’s economic structure. For many African states, this duality creates a complex landscape in which both positive and negative effects coexist.

Geopolitical tensions involving Iran are particularly significant due to the country’s strategic position in global energy markets. Márquez-Velázquez (2025) argues that political instability in the Middle East remains a key driver of oil price volatility, often outweighing purely economic factors. Similarly, Liu (2025) highlights the broader economic implications of the Iran conflict, noting its potential to disrupt trade flows and investor confidence. Recent analyses by Meng, Khan, Adebayo and Olanrewaju (2024) point to the vulnerability of energy supply chains, particularly in critical chokepoints such as the Strait of Hormuz, where disruptions can have immediate global repercussions.

For African economies, these dynamics translate into a range of challenges. Oil-exporting countries may experience temporary revenue gains during price spikes, but such benefits are often offset by volatility and uncertainty (Ekpo, Oyewole and Isike 2026). On the other hand, oil-importing countries face increased costs, leading to inflationary pressures and reduced purchasing power (Shang and Hamori 2024). UNCTAD (2025) underscores Africa's vulnerability to global shocks, emphasizing the need for stronger regional trade integration to mitigate external risks. Similarly, the UNDP (2026) highlights the adverse effects of geopolitical tensions on African economies, including reduced investment flows and heightened fiscal stress.

Recent events surrounding the conflict between Israel and Iran further confirm these trends. Fluctuations in global crude oil prices directly affect fuel costs in countries like Nigeria, demonstrating the immediate impact that conflicts in other regions have on local economies. Odo et al. (2026) also highlight broader consequences for African consumer markets, including rising prices for goods and services; such economic pressure can exacerbate social tensions and undermine political stability (Ndou and Gumata 2025).

While these studies provide valuable insights, they often treat geopolitical tensions as exogenous shocks without examining their underlying political drivers. Moreover, there is limited integration of economic and political analyses, resulting in fragmented understandings of how U.S.-Iran rivalry shapes Africa's political economy. This study seeks to bridge this gap by linking macroeconomic outcomes to specific geopolitical dynamics, offering a more comprehensive perspective on Africa's economic vulnerability.

Security Implications and African Responses to U.S.-Iran Rivalry

The security dimension of the US-Iran rivalry is increasingly attracting the attention of researchers, particularly regarding its impact on strategically vital regions and the global security architecture. The significance of key maritime corridors—such as the Red Sea and the Gulf of Aden—as critical hubs for global trade and security systems is evident. The Red Sea constitutes a regional security complex where the interplay between local and external actors determines the level of regional stability. The growing militarization of these zones reflects broader geopolitical rivalries and carries serious consequences for the African states situated along these routes.

In recent years, geopolitical fragmentation has intensified in the Horn of Africa, driven in part by the rivalry between external powers. A key feature of the region's evolving security landscape is the realignment of strategic forces, as states navigate complex relationships with global powers. Similarly, the growing influence of external players—including Türkiye—is a visible component of the region's competitive landscape. Attention is also drawn to the role of “proxy actors” (parties acting on behalf of other forces) in conflicts—such as in Somalia—demonstrating how global rivalries can translate into localized forms of violence.

Academic literature on Africa's security architecture highlights the continent's efforts to establish flexible and resilient response mechanisms. Vivoda, Matthews and Andresen (2025) argue that adaptive approaches to peacebuilding are essential to counter complex and evolving threats. The African Union identifies the African

Standby Force as a key element of continental security, while recent statements from the organization reflect growing concern regarding the impact of Middle Eastern conflicts on Africa. However, the implementation of these institutional measures often faces challenges related to resource constraints, coordination issues, and a lack of political will.

Recent policy-oriented analyses offer further insight into the security implications of U.S.-Iran tensions. Experts point to the likelihood of rising instability in the Horn of Africa, driven by external interference and shifting alliance structures. They emphasize the broader strategic consequences for Africa, including the risk of the continent becoming a theater for proxy conflicts. In this context, these processes can be viewed through the lens of risk politics, a framework in which uncertainty and instability emerge as defining characteristics of the international system.

At the same time, African states and regional organizations have developed various strategies to address these challenges. Africa's response to great-power rivalry is often characterized by pragmatism and a drive for strategic balancing. Experts also highlight the role of migration and diaspora networks in shaping Africa's ties with Middle Eastern nations, adding a further layer of complexity to these interactions. Drawing parallels between various instances of geopolitical intervention reveals the pivotal role played by natural resources and strategic interests in shaping the nature of external involvement.

Despite the existence of such studies, the academic literature on this subject remains fragmented, and analyses across the security, economic, and political spheres lack sufficient integration. There is also a tendency to focus on specific regions or issues rather than forming a holistic view of Africa's position within the global geopolitical standoff. This study aims to address these gaps by examining the multifaceted impact of U.S.-Iran tensions and analyzing the strategies employed by African actors to mitigate risks and enhance resilience. In doing so, the work contributes to a deeper and more comprehensive understanding of Africa's evolving role on the global geopolitical stage.

Methodology

This study adopts a qualitative, interdisciplinary research design anchored in political economy analysis and security studies to examine the multifaceted impact of U.S.-Iran geopolitical tensions on Africa. The complexity of the research problem, spanning economic shocks, geopolitical risk transmission, and security dynamics, necessitates an approach that goes beyond single-method inquiry. As Lazarus and Sarkar (2026) suggest, understanding the intersection of strategy and economic relations requires analytical flexibility capable of capturing both material and ideational dimensions of global power competition. Accordingly, this study combines qualitative content analysis with elements of comparative case-oriented reasoning to generate a nuanced and context-sensitive interpretation of Africa's position within these geopolitical processes.

The primary method employed is qualitative content analysis of secondary data, including peer-reviewed journal articles, policy reports, institutional publications, and credible media sources drawn from the provided reference list. This approach is

particularly appropriate given the evolving and transnational nature of U.S.-Iran tensions, where real-time primary data collection would be constrained by accessibility and reliability challenges. Existing studies on geopolitical risk and economic transmission, such as Bøås and Strazzari (2026), demonstrate the value of synthesizing diverse data sources to trace patterns of global interdependence. By systematically analyzing these materials, the study identifies recurring themes, causal linkages, and regional variations in how geopolitical tensions manifest across Africa's political economy and security landscape.

To address the first objective, which focuses on the political economy implications of U.S.-Iran tensions, the study employs a thematic analytical framework centered on oil price volatility, trade disruptions, and inflationary pressures. This choice is informed by a substantial body of literature linking geopolitical shocks to commodity price dynamics (Ekpo, Oyewole and Isike 2026; Liu 2025). The framework enables the tracing of causal pathways from geopolitical events—such as military escalations or sanctions regimes—to macroeconomic outcomes in African states. In line with Ekpo, Oyewole and Isike (2026) and Shang and Hamori (2024), the analysis distinguishes between oil-exporting and oil-importing countries to capture differentiated impacts. This methodological approach is particularly suitable because it allows for the integration of macroeconomic insights with geopolitical analysis, thereby addressing a key gap in the literature where these dimensions are often treated separately.

For the second objective, which examines the security implications of U.S.-Iran rivalry, the study adopts a regional security complex perspective complemented by qualitative assessment of institutional responses. Drawing on Agostinelli dos Santos and Mattar Nasser (2026), this approach situates Africa, particularly the Red Sea and Horn of Africa regions, within broader networks of strategic interaction involving both regional and external actors. The use of qualitative analysis allows for the exploration of less quantifiable phenomena, such as proxy dynamics, militarization, and shifting alliances, which are difficult to capture through purely quantitative methods. Studies such as Idowu (2026) highlight the evolving nature of Africa's security architecture, reinforcing the need for interpretive methods that can account for institutional adaptation and contextual variation. Additionally, policy reports from organizations such as the African Union and the African Digital Democracy Observatory (2026a) provide valuable insights into operational realities and emerging threats, further justifying the reliance on qualitative synthesis.

The third objective, which evaluates the response strategies of African states and regional organizations, is addressed through a comparative analytical lens that identifies patterns of adaptation across different contexts. This involves examining diplomatic positioning, economic policy adjustments, and security cooperation mechanisms as reported in sources such as Muyebe and Kabandula (2025), UNCTAD (2025), and UNDP (2026). The comparative dimension does not aim to produce exhaustive country-level case studies but rather to highlight representative patterns and divergences that illustrate broader trends. This approach is particularly appropriate given the diversity of African states and the varying degrees of exposure to geopolitical shocks. By focusing on patterns rather than isolated cases, the study is able to generate insights that are both analytically robust and broadly applicable.

Furthermore, the study incorporates elements of process tracing to establish plausible causal linkages between U.S.-Iran tensions and observed outcomes in Africa. While acknowledging the limitations of attributing causality in complex global systems, this method allows for the identification of sequential relationships between geopolitical events and their economic or security consequences. For instance, disruptions in the Strait of Hormuz, as discussed by Ekpo, Oyewole and Isike (2026), can be linked to subsequent fluctuations in global oil prices and their downstream effects on African economies. Similarly, the proliferation of proxy actors in regions such as Somalia can be interpreted as part of a broader pattern of externalized conflict dynamics. This combination of thematic analysis and process tracing enhances the explanatory power of the study.

The choice of a qualitative and integrative methodology is further justified by the limitations of existing quantitative approaches in capturing the full scope of geopolitical dynamics. While econometric models provide valuable insights into correlations and trends, they often lack the capacity to account for the political and strategic factors that drive these outcomes. As noted by Ekpo, Oyewole and Isike (2026), understanding Africa's vulnerability to geopolitical risk requires attention to both structural conditions and agency. By combining insights from political economy, security studies, and policy analysis, this study offers a more holistic perspective that aligns with the interdisciplinary nature of the research problem.

Finally, the study acknowledges certain methodological limitations, including potential biases in secondary sources and the challenge of isolating the effects of U.S.-Iran tensions from other concurrent global developments. However, these limitations are mitigated through careful source selection, triangulation of data, and critical evaluation of evidence. The use of a diverse range of sources, from academic journals to policy reports, enhances the reliability and validity of the findings. Overall, the adopted methodology is well-suited to the study's objectives, providing a rigorous and flexible framework for analyzing the complex and evolving relationship between great power rivalry and Africa's political economy and security architecture.

Results and Discussion

The results presented in Tables 1 to 4 reveal a consistent pattern: U.S.-Iran geopolitical tensions exert multidimensional effects on Africa through interconnected economic and security channels, while African responses remain adaptive but uneven across states and regions. In terms of political economy, oil price volatility emerges as the most immediate transmission mechanism, influencing fiscal stability, inflation, and macroeconomic performance. The findings confirm that oil-exporting economies experience revenue fluctuations tied to global price movements, whereas oil-importing countries bear the burden of rising energy costs and inflationary pressures. Trade disruptions and financial market instability further amplify these effects, reflecting Africa's deep integration into global economic systems.

From a security perspective, as reported in Table 2, the results highlight increased maritime insecurity and the militarization of strategic regions, particularly in the Red Sea and the Horn of Africa. These developments are accompanied by the proliferation of proxy actors and growing strain on regional security institutions. The findings also

indicate that Africa’s existing security frameworks, while evolving, face significant capacity constraints in responding to complex and externally driven threats.

Table 1. Political Economy Impacts of U.S.–Iran Geopolitical Tensions on Africa

Dimension	Key Indicators	Observed Effects in Africa
Oil Price Volatility	Crude oil price fluctuations; supply disruptions	Revenue instability in oil-exporting countries; increased fiscal uncertainty
Inflationary Pressures	Rising fuel and import costs	Increased cost of living; currency depreciation; reduced purchasing power
Trade Disruptions	Shipping delays; increased transport costs	Reduced trade efficiency; higher import/export costs
Financial Market Stress	Capital flow volatility; investor uncertainty	Declining foreign investment; increased borrowing costs
Consumer Market Effects	Price transmission to goods/services	Rising prices in food, energy, and basic commodities

Source: Author (2026)

Regarding response strategies, as reported in Table 3, the results show that African states and regional organizations adopt a combination of diplomatic balancing, economic adaptation, and security cooperation. However, these responses vary considerably depending on national interests, institutional capacity, and exposure to geopolitical risks. While some countries pursue diversification and regional integration, others rely on short-term policy measures such as subsidies and strategic alliances. Overall, the results underscore a central theme: Africa remains structurally vulnerable to external shocks, yet it is not entirely passive, as evidenced by emerging patterns of strategic adaptation.

Table 2. Security Implications of U.S.–Iran Rivalry for Africa

Dimension	Key Indicators	Observed Effects in Africa
Maritime Insecurity	Increased naval activity; chokepoint tensions	Threats to shipping routes in Red Sea and Gulf of Aden
Militarization of Strategic Regions	Foreign military presence; base expansion	Heightened tensions in Horn of Africa and Sahel
Proxy Conflicts	Non-state armed groups; external support	Intensification of conflicts in fragile states (e.g., Somalia)
Institutional Strain	Pressure on regional security frameworks	Limited capacity of African Standby Force and AU mechanisms
Regional Instability Spillovers	Conflict diffusion; cross-border insecurity	Increased migration pressures and humanitarian risks

Source: Author (2026)

Table 3. Response Strategies of African States and Regional Organizations

Strategy Type	Key Actions	Observed Patterns
Diplomatic Alignment	Neutrality; selective partnerships	Strategic balancing between global powers
Economic Adaptation	Diversification; regional trade strengthening	Efforts to reduce dependence on external shocks
Energy Policy Adjustments	Subsidy reforms; alternative sourcing	Attempts to stabilize domestic fuel markets
Security Cooperation	Joint operations; AU-led initiatives	Strengthening regional security frameworks
Strategic Realignment	New alliances; policy shifts	Increasing engagement with multiple external actors

Source: Author (2026)

Table 4. Integrated Analytical Summary Across Objectives

Objective	Core Findings	Key Implication
Political Economy	U.S.–Iran tensions transmit through oil markets, trade, and finance	Africa remains highly vulnerable to external economic shocks
Security Architecture	Rivalry intensifies militarization and proxy dynamics	Existing African security mechanisms face capacity constraints
Response Strategies	African states adopt mixed strategies of adaptation and balancing	Greater regional coordination is needed to enhance resilience

Source: Author (2026)

The findings on political economy impacts reinforce and extend existing literature on the transmission of geopolitical shocks through global commodity markets. Oil price volatility, as identified in Table 1, reflects the central role of energy markets in linking distant geopolitical events to African economic outcomes. This aligns with Ekpo, Oyewole and Isike (2026), who demonstrate that oil price shocks significantly influence economic activity in developing economies. However, the results also suggest a more nuanced dynamic: while price increases may temporarily benefit oil exporters, the accompanying volatility undermines long-term fiscal planning and investment stability. This observation is consistent with Asafo-Adjei, Adam and Darkwa (2024) and Jiang (2026), who argue that oil-dependent economies are particularly vulnerable to cyclical shocks.

Moreover, the differentiated impact between oil-exporting and oil-importing countries highlights structural asymmetries within Africa. Shang and Hamori (2024) note that oil-importing economies face stronger inflationary pressures due to rising energy costs, a finding supported by recent evidence from African markets (UNDP 2026; Afşar, Polat, Afşar and Kahraman 2026). The broader implication is that U.S.–Iran tensions exacerbate existing inequalities within the continent, creating uneven economic outcomes. This dynamic is further compounded by trade disruptions, as increased shipping costs and logistical uncertainties affect both imports and exports

(Bøås and Strazzari 2026). In line with UNCTAD (2025), the results underscore the need for greater regional trade integration to mitigate external vulnerabilities.

The role of financial market stress, as indicated in Table 1, also merits closer attention. Geopolitical uncertainty tends to reduce investor confidence, leading to capital outflows and increased borrowing costs. Eslami and Akbarzadeh (2025) highlight the growing importance of financial channels in the transmission of geopolitical risk, particularly in an era of globalized capital markets. For African economies, this translates into reduced access to external financing and heightened fiscal constraints, further limiting their capacity to respond to shocks. Importantly, the findings suggest that these economic effects are not isolated but interact with broader socio-political dynamics, including rising living costs and public discontent.

Turning to security implications, the results presented in Table 2 confirm that U.S.-Iran rivalry contributes to the militarization of strategically important regions. The Red Sea and the Gulf of Aden, as highlighted by Agostinelli dos Santos and Mattar Nasser (2026), serve as critical chokepoints in global trade, making them particularly sensitive to geopolitical tensions. The increased presence of external military actors in these regions reflects broader patterns of great power competition, with significant implications for African security. Sadeqi Mohammadi and Weaver (2025) conceptualize this dynamic as part of a regional security complex, where local and global actors interact in ways that shape stability and conflict.

The proliferation of proxy actors represents another key dimension of the security landscape. The findings indicate that external rivalries are often manifested through localized conflicts, particularly in fragile states such as Somalia. This observation is supported by the African Digital Democracy Observatory (2026b), which documents the role of proxy dynamics in shaping conflict outcomes. Such developments complicate efforts to maintain stability, as they introduce additional layers of complexity and unpredictability. Melkon, Salgado and Putter (2025) further note that geopolitical fragmentation in the Horn of Africa is driven by overlapping interests and shifting alliances, reinforcing the idea that external rivalries exacerbate existing vulnerabilities.

Institutional responses to these challenges, while significant, appear constrained. The African Union's security mechanisms, including the African Standby Force, represent important steps toward collective security. However, as Idowu (2026) argues, these frameworks are still evolving and often lack the resources and coordination needed to address complex threats. The results suggest that while regional organizations play a crucial role, their effectiveness is limited by structural and operational challenges. This finding aligns with broader critiques of Africa's security architecture, which emphasize the need for greater capacity-building and institutional reform.

The discussion of response strategies, as summarized in Table 3, reveals a pattern of pragmatic adaptation among African states. Diplomatic balancing emerges as a dominant strategy, with countries seeking to maintain neutrality while engaging with multiple global actors. Muyebe and Kabandula (2025) characterize this approach as a form of strategic autonomy, allowing African states to navigate an increasingly polarized international system. However, the effectiveness of this strategy depends on

the ability of states to leverage their positions without becoming overly dependent on external powers. Economic adaptation strategies, including diversification and regional integration, are also evident in the findings. Muyebe and Kabandula (2025) emphasize the importance of resilience in the face of global shocks, a theme echoed in the efforts of African states to reduce dependence on volatile external markets. Nevertheless, the reliance on short-term measures such as subsidies and price controls highlights the limitations of these strategies. UNDP (2026) notes that while such interventions can provide temporary relief, they often impose long-term fiscal burdens.

Security cooperation represents another important dimension of African responses. Initiatives led by the African Union and sub-regional organizations aim to enhance collective security and address shared challenges. However, as indicated in the results, these efforts are uneven and often constrained by resource limitations. The broader implication is that while African states are actively responding to geopolitical pressures, their capacity to do so effectively varies significantly. The integrated findings presented in Table 4 underscore the interconnected nature of economic and security dynamics. U.S.–Iran tensions not only affect Africa through discrete channels but also create feedback loops that reinforce vulnerability. For example, economic instability can exacerbate security challenges, while conflict can further disrupt economic activity.

Policy Implications

The findings of this study carry significant policy implications for African governments, regional institutions, and development partners, particularly in managing external vulnerabilities arising from great power rivalries. First, there is a clear need for African economies to strengthen macroeconomic resilience against oil price volatility and external shocks. Policymakers should prioritize economic diversification strategies that reduce dependence on oil exports and imports, especially in countries highly exposed to global energy market fluctuations. This aligns with the arguments of Ekpo, Oyewole and Isike (2026), who emphasize the destabilizing effects of oil price cycles on developing economies. In addition, fiscal stabilization mechanisms—such as sovereign wealth funds and countercyclical fiscal policies—should be reinforced to cushion the impact of revenue volatility. Strengthening domestic revenue mobilization systems can further reduce reliance on external financing, which is often constrained during periods of geopolitical uncertainty (Lob and Yilmazkuday 2025).

Second, trade resilience must be enhanced through deeper regional integration and the operationalization of frameworks such as the African Continental Free Trade Area (AfCFTA). The study shows that trade disruptions linked to geopolitical tensions increase transaction costs and supply chain vulnerabilities. Expanding intra-African trade can mitigate these risks by reducing dependence on external markets and shipping routes exposed to conflict. UNCTAD (2025) highlights that regional trade integration can serve as a buffer against global shocks, while Bøås and Strazzari (2026) demonstrate how trade diversification reduces exposure to geopolitical disruptions. Policymakers should therefore focus on improving trade infrastructure, harmonizing regulations, and facilitating cross-border commerce to strengthen economic resilience.

Third, the study underscores the importance of addressing inflationary pressures and rising living costs associated with geopolitical tensions. Governments should adopt targeted social protection measures to shield vulnerable populations from the adverse effects of price increases, particularly in energy and food markets. However, as noted by UNDP (2026), such interventions must be carefully designed to avoid long-term fiscal imbalances. In this regard, a shift toward more efficient subsidy systems, including targeted transfers rather than universal subsidies, can enhance both equity and sustainability. Additionally, monetary authorities should strengthen inflation-targeting frameworks to maintain price stability in the face of external shocks (Shang and Hamori 2024).

Fourth, the security implications of U.S.–Iran tensions call for a more coordinated and proactive approach to regional security governance. The militarization of strategic regions such as the Red Sea and the proliferation of proxy actors necessitate stronger maritime security frameworks and intelligence-sharing mechanisms. The African Union and sub-regional organizations should enhance their operational capacity to monitor and respond to emerging threats, building on existing initiatives such as the African Standby Force. As Idowu (2026) argues, effective security governance in Africa requires not only institutional frameworks but also adequate resources and political commitment. Strengthening partnerships with international actors, while maintaining strategic autonomy, can further support capacity-building efforts.

Fifth, African states must refine their diplomatic strategies to navigate the complexities of great power competition. The study highlights the prevalence of diplomatic balancing as a response to U.S.–Iran rivalry, reflecting efforts to maintain neutrality while engaging multiple partners. Mueyba and Kabandula (2025) suggest that such strategic autonomy can enhance Africa's bargaining power in global affairs. However, this approach requires coherent foreign policy frameworks and strong institutional coordination to avoid fragmentation and policy inconsistency. Regional organizations can play a critical role in articulating common positions and representing collective interests in international forums.

Finally, there is a need for integrated policy approaches that address the interconnected nature of economic and security challenges. The study demonstrates that geopolitical tensions create feedback loops between economic instability and security risks, necessitating holistic policy responses. Mueyba and Kabandula (2025) emphasize the importance of resilience-building strategies that cut across sectors, while Márquez-Velázquez (2025) highlights the interconnectedness of regional security dynamics. Policymakers should therefore adopt cross-sectoral frameworks that integrate economic planning, security governance, and diplomatic engagement. Such approaches can enhance Africa's ability to respond effectively to complex and evolving geopolitical challenges.

Conclusion and discussion

This study set out to examine the impact of U.S.-Iran geopolitical tensions on Africa's political economy and security architecture, with a particular focus on transmission mechanisms, security implications, and response strategies. The findings reveal that Africa remains highly exposed to external shocks transmitted through global commodity markets, trade networks, and financial systems. Oil price volatility emerges as a central channel through which geopolitical tensions affect economic stability, with divergent effects on oil-exporting and oil-importing countries. At the same time, trade disruptions and financial market instability further compound these challenges, underscoring the structural vulnerabilities of African economies.

In addition to economic impacts, the study highlights significant security implications associated with great power rivalry. The militarization of strategic regions, particularly in the Red Sea and the Horn of Africa, and the proliferation of proxy actors contribute to an increasingly complex security environment. While regional institutions such as the African Union have made important strides in developing security frameworks, their capacity to address these challenges remains constrained. This underscores the need for continued investment in institutional development and regional cooperation.

Despite these vulnerabilities, the study also finds evidence of adaptive responses among African states and regional organizations. Diplomatic balancing, economic diversification, and security cooperation emerge as key strategies for navigating geopolitical tensions. However, the effectiveness of these responses varies across countries, reflecting differences in institutional capacity and exposure to risk. Moving forward, strengthening resilience through integrated policy approaches and enhanced regional collaboration will be critical to mitigating the impact of external shocks and ensuring sustainable development.

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Ethics Statement

The author confirms that this study was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The author declares no conflict of interest.

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MULTICULTURALISM AND THE BRICS+: EXPLORING EMERGING ISSUES AND PROSPECTS

ESTHER OLUWASEUN IDOWU* 
Nigerian Institute of International Affairs

OLADELE DANIEL IDOWU** 
Olabisi Onabanjo University

Abstract

This study examines the challenges and prospects of multiculturalism within the context of emerging global alliances, with a particular focus on the BRICS+ bloc. While globalization has facilitated unprecedented interconnectedness across cultures, economies, and political systems, it has also increased asymmetries and cultural hierarchies that risk reproducing hegemonic structures within multilateral formations. Despite BRICS+'s growing significance as a driver of global economic growth, limited scholarly attention has been paid to the cultural dynamics that underpin its cohesion and long-term sustainability. Drawing on globalization theory and deploying qualitative analysis of secondary data, this study examines how cultural diversity within BRICS+ shapes internal relations, policy coordination, and global positioning. It argues that although multiculturalism provides a framework for inclusivity and cooperation, it simultaneously generates tensions such as ethnocentrism, majoritarian dominance, and latent supremacist ideologies that may undermine collective identity. The findings reveal that the success of BRICS+ as a geopolitical and economic bloc is dependent not only on economic complementarities but also on its capacity to negotiate cultural differences through inclusive and non-hegemonic structures. The study advances the concept of "bounded identity" as a strategic model for engendering unity without eroding cultural distinctiveness. It further demonstrates that multiculturalism, when effectively managed, can promote cross-cultural understanding, strengthen institutional cooperation, and support more equitable global engagements.

Keywords: BRICS+, bounded identity, culture, globalization, multiculturalism, multilateralism.

* **Esther Oluwaseun Idowu** is a Research Fellow at the Nigerian Institute of International Affairs, Lagos. Email: e.idowu@niia.gov.ng. ORCID: <https://orcid.org/0009-0004-0984-2789>.

** **Oladele Daniel Idowu** is a PhD in Philosophy and lecturer in Socio-Political Philosophy and Logic at Olabisi Onabanjo University, Ago-Iwoye. Email: idowu.oladele@oouaguiwoye.edu.ng. ORCID: <https://orcid.org/0000-0001-5794-1571>.



Introduction

Multiculturalism, being a defining aspect of modern global dynamics, has a significant impact on the political, social, and cultural spheres. It connotes the coexistence and cohesion of multiple cultures, encompassing diversities in language, religion, traditions, and social norms, within a shared political or geographical framework (Taylor 1994). Within the context of the BRICS+ framework which is an expanded alliance of Brazil, Russia, India, China, South Africa, and other developing economies, multiculturalism presents both challenges and opportunities even as these nations seek to create synergies despite their vast cultural and systemic differences (Stuenkel 2015). This union represents a diverse array of cultures, political systems, languages, traditions, and economic structures exemplifying a microcosm of global multicultural coexistence. Multiculturalism plays a fundamental role in shaping interactions among nations and promoting global cooperation in international politics.

The BRICS+ coalition is aimed at the amalgamation of established and emerging economies in global governance thereby fostering cooperation in trade, technology, and sustainable development. It is also targeted at reshaping global governance by presenting an alternative to traditional Western-led institutions (Khasru 2021). In achieving this, the multifaceted construct of member-nations springs complex issues, including issues of cultural integration, policy harmonization, and the equitable representation of diverse identities in decision-making processes. Favorably, this diversity serves as a potential strength, offering innovative pathways for inclusive policymaking, intercultural dialogue, and collaborative problem solving. For instance, the linguistic diversity among BRICS+ nations—spanning Portuguese, Mandarin, Hindi, Russian, and Zulu—is both a communication barrier and an opportunity for promoting multilingualism in global governance (Chakrabarty & Bhattacharya 2020).

This study delves into the interplay between multiculturalism and the BRICS+ alliance, examining how a cultural mix and diversity can be transformed into channels for influencing policy formulation, economic collaboration, and geopolitical strategies. It also explores the prospects of leveraging multiculturalism as a unifying force to address emerging global challenges. By understanding the analysis of these dimensions, the study reveals the opportunities and obstacles inherent in building a multicultural coalition in an increasingly interconnected world.

Multiculturalism Conceptualized

As is common with concepts, ideas and terminologies in the Social Sciences, multiculturalism does not have a generally accepted definition. However, there are factors that aid the understanding of this ideology. The core idea of multiculturalism has been taken up, deployed and curated for use by a wide array of researches in the Social Sciences. It is even believed to be, in contemporary times, one of the most articulated concepts within social theories and practice. The term “multiculturalism” has other allied concepts such as “multicultural society”, “policy of multiculturalism” and they emerged in academic glossary in the 1960s in Canada (Grishaeva 2012).

Cashmore presents multiculturalism as an ideology, a discourse, a sphere of policies and practices. It is a way of thinking, and a pattern of scientific behavior established

over the years among different sets of people (Cashmore 1996). By tagging it a discourse, it presents multiculturalism as an area of debate, which is subject to various levels of intellectual discussion. It can also be described as a sphere of policies and practices when regarded as a guideline for action or a blueprint established for people bound by it to follow.

In Rosado's conception, multiculturalism is a set of values and beliefs that acknowledges and respects the existence of all different groups in a society or organization, values their sociocultural differences, and supports and facilitates their ongoing contributions in an inclusive cultural setting that empowers everyone in the society or organization (Rosado 1997). This depicts a sense of affinity and adaptability to certain sets of standards practiced in a society. This definition recognizes diversity among groups of people and their contributions at different levels to the progress of the society.

According to Song, the term, "Multiculturalism" encompasses a number of normative claims and goals, however, it is apt to say that proponents of multiculturalism mostly find a common ground to reject the idea of a "melting pot"; a situation in which members of minority groups are expected to blend in and adapt into the prevailing culture. In lieu, exponents of multiculturalism have an agreement on the idea that the members of those minority groups can retain their distinguishing collective identities and practices (Song 2010). In this context, the reference is to participating states of BRICS+, in that, despite the heterogeneous nature of the states, it is plausible for them to retain their own culture in all its shades. This will foster a smooth coexistence in the larger space.

Other closely associated concepts with multiculturalism are "identity politics," "the politics of recognition," and "the politics of difference." These concepts are bound together in their commitment to revaluing marginalized, less-recognized and less-respected identities and changing prevailing communication and representation practices that exclude or discriminate against certain groups (Gutmann 2003; Taylor, 1992; Young, 1990). According to Song (2010), multiculturalism is not merely about claims of identity and culture but also encompasses matters of economic interests and political power. This extends to the demands for alleviating political and socio-economic disadvantages that people experience due to their marginalized group identities.

Membership of BRICS+ has some benefits such as development assistance, increased foreign direct investment, access to a vast market, and the opportunity for free trade with prominent BRICS+ members such as China. It also provides opportunities to invest in critical infrastructure projects that are capable of enhancing connectivity and economic integration among member states. Trade and investment of participating nations get a boost as the common economic aspirations of the member-nations get a lift.

Presumably, the whole gamut of the idea of multiculturalism is that groups and individuals are completely absorbed into a community, and yet not having to experience the loss of their national identity or any form of identity whatsoever nor being alienated from their rights. In this context, nations from different global axes are coming together for mutual benefits, which would require signing pacts, treaties, and

agreement, some of which can puncture their sovereignty. Multiculturalism depicts the conceptual foundation of non-conflictual cohesion and co-existence of several, diverse and independent cultural groups in a common milieu. Therefore, a budding assortment produces delineating multicultural values, such as an idea of freedom of choice and mutual commitment. Even as BRICS+ is primarily and essentially an economic inter-governmental formation, it presents a number of constraints one of which is the hegemonic tendencies of the super powers in the formation and fear of subjugation.

In simple terms, multiculturalism, which refers to the concurrence and collaboration of multiple religious, ethnic, and cultural groups within a society or between nations, carries out a fundamental role in shaping the policies, economic cooperation, and global influence of BRICS+.

There are quite a number of studies on the concept of multiculturalism (Grishaeva 2012; Song, 2010; Gutmann, 2003; Rosado, 1997; Cashmore, 1996; Taylor, 1992; Young, 1990) but there is a dearth of literature on the study of multiculturalism with a special focus on BRICS+. Therefore, aside analyzing multiculturalism, this study is focused on enunciating and discussing the emerging issues in the BRICS+ (with a focus on cross-cultural interactions and the dynamics involved) as well as problems and prospects, especially future prospects of BRICS. Globalization theory, particularly cultural globalization would be used to foreground and analyze the understanding of cultural diversity in the operations of a multilateral body such as the BRICS+.

The BRICS+ Ideology

The forces of globalization have fostered the communion of peoples, languages, societies, ideologies, and cultures across races and states. Multi-polarity, multilateralism, and multiculturalism have therefore become common phenomena in international politics. The cohesion among the members of BRICS (which transited to BRICS+ at the admittance of six more nations in January 2024) and the remarkable progress and landmarks attained since inception is noteworthy. Despite the lopsided or uneven economic status of member-states, they are the major engine of global economic growth over the years. Embracing multiculturalism is necessary but comes with its encumbrances. The likelihood of supremacist ideologies, internal wrangling, politics of majority versus minority, and ethnocentrism may not be far-fetched. In world politics, as an example, the dissection of states into global north (super dogs) and global south (underdogs) is palpable. It is therefore likely that hegemonic tendencies, discrimination, and other forms of cultural bias would exist within the BRICS+.

BRICS, a conglomerate of established and emerging economies (comprising the Federative Republic of Brazil, the Russian Federation, the Republic of India, the People's Republic of China and the Republic of South Africa), was founded in 2009 after several meetings and strategic deliberations. In 2024, it added Argentina, Egypt, Saudi Arabia, Ethiopia, Iran, and the United Arab Emirates out of over 40 nations that indicated interest in aligning with the economic forum for the welfares, supports and aids membership would provide which includes upward changes in finance, and an improvement in trade and investment.

With their intentions and purposes, in terms of the 16 June 2009 Russian proposal, at which the first BRIC Summit was held in Yekaterinburg, the purposes of the group

were "to foster dialogue and cooperation among the countries participating in the group in a gradual, pro-active, pragmatic, open and transparent fashion." The exchange of dialogue and cooperation between BRICS+ countries is not only conducive to achieving common interests of emerging market economies and developing nations but also conducive to building a world with common prosperity and enduring peace. These were issued as a joint statement by the leaders following the Summit (BRICS 2015).

As it is now, the membership of BRICS traverses the global space with participating member-nations spreading from Asia to Europe, and Africa to South America. Notably, BRICS+ countries are influential members of leading international agencies and organizations, including the UN, the G20, and Group of 77 and the Non-Aligned Movement. They also have membership of various regional associations: Brazil is a member of the Union of South American Nations, the Community of Latin American and Caribbean States, and MERCOSUR. The Russian Federation is a member of the Commonwealth of Independent States, the Eurasian Economic Union, and the Collective Security Treaty Organization. Russia and China are members of the Asia Pacific Economic Cooperation and the Shanghai Cooperation Organization. India is a member of the South Asian Association for Regional Cooperation while South Africa is a member of the Southern African Development Community and the African Union. (InfoBRICS, n.d.).

There are principles that govern relationships among BRICS+ partners and are established on the basis of the UN Charter, other well-established principles and norms of international law and the best principles, which the member states agreed to in their 2011 Summit. These are pragmatism, solidarity, openness, non-bloc nature and neutrality in respect to third parties. The BRICS all agree that for them to achieve their mutual economic aspirations, transformation in the international political economy as well as the form of multilateralism is required. They have a shared aspiration to transform the existing pro-western global governance system (Erediauwa 2024)

The BRICS+ initiative, which builds upon the original BRICS formation, represents a coalition of nations with different political systems, economic structures, and cultural heritages. In spite of the dissimilarities, scholars argue that cultural pluralism can engender innovative policymaking and intercultural dialogue, enabling member states to tackle global challenges collaboratively (Hofstede 1991). More so, the group's diverse composition may enhance its resilience and adaptability, as members bring unique perspectives and ideas to the table. For example, India's deep-rooted democratic traditions, China's centralized governance model, and Brazil's emphasis on regional cooperation contribute to a rich tapestry of approaches to global problem-solving (Nye 2010).

Theoretical Alignment

Globalization theory provides a framework for understanding how BRICS+ countries can manage cultural mix and diversity, both at the domestic level and at the international arena. This theory examines the constantly increasing interconnectedness of the world through economic, cultural, and technological exchanges. This interconnectivity is facilitated by information and technology. It explores how global

flows of people, ideas, and goods impact national identities, cultural practices, and social structures.

In simple terms, globalization is re-defining the conventional framework of learning by observing the social world and human culture (Appelbaum and Robinson 2005). Globalization studies emerged from the 1970s and onwards and led to multi-level concepts on the whole idea of globalisation. Firstly, there was the advent of a globalized economy with new types of production, consumption, finance, politics and global economic integration. There were also the new patterns, practices and flows that were emerging transnationally or globally, and the concept of 'global culture(s)'. Third, there was the political processes in the global system, the development of new institutions that were transnational, and concurrently the spreading of global governance and authority structures of any sort. The fourth one was the unprecedented multi-faceted movement of people all over the world consisting of new forms of transnational migration, identities and communities. The fifth concept of globalisation was emerging new social hierarchies, forms of inequality, and relations of dominations in the world and in the whole global system (Robinson 2007).

As comprehensive as is the notion of the concept of globalization, different authors have equated globalization with expanding global imbalances, new methods of domination and exploitation, marginalization, displacement, ecological holocaust and anti-globalization. Other individuals have welcomed the process as one of new wealth, freedom, emancipation, and democracy. Such normative issues, as much as whether or not they are brought into focus, will feature prominently in any summary of globalization theories. Robinson (2007) represents a variety of theoretical discourses which are paradigmatically heuristic tools in realized research on globalization such as the theory of transnationalisation and transnationality, the world systems theory, the theory of global capitalism, the theories of global culture, among a few others.

However, a suitable theoretical underpinning for analyzing multiculturalism within the context of BRICS, even when it can be multi-variegated, may conveniently draw up on the idea of cultural globalisation, which depicts that there would always be a prevailing and dominant culture in any multi-polar and multilateral system. This eventually has implications for other specific aspects of multiculturalism such as internal cultural policy, international cultural diplomacy, and the impact of global cultural flows on BRICS societies. It is also applicable in the critical analysis of how members of BRICS+ can navigate the challenges as well as the advantages of multiculturalism in a modern, globalized world. As such, this theoretical framework provides understanding on how member-nations are able to manage the impact and influence of global cultural flows on their individual national identities. It also aids in comprehending how they strategically position themselves as cultural and economic hubs in the global system.

In sum, globalization theory indicates the increasing interconnectedness of the world through economic, cultural, and technological exchanges. It is an exploration of how global flows of people, ideas, and goods impact national identities, cultural practices, and social structures.

BRICS+: Emerging Issues

Kymlicka highlights how crucial culture is to both individual liberty and national self-determination. According to him, belonging to a culture is a "primary good" and a necessary prerequisite for success. Self-identity is also significantly influenced by cultural affiliation. However, when a state is absorbed by different cultures, multiculturalism can cause its identity and culture to become blurred, possibly losing its distinctiveness. In another piece, Kymlicka (1989) drops the Rawlsian conception, and places primacy on national self-determination, which is closely synonymous with autonomy. His viewpoint on multiculturalism emphasizes the importance of having a wide variety of choices (Kymlicka 1995, 89–90).

According to Grishaeva (2012), multiculturalism takes on unique logics and manifests as a means of fostering intergroup collaboration aimed at preserving particular cultures and giving people and groups the ability to be equal in all areas of social life, including politics and culture. Multiculturalism in practice translates to the multi-level interaction that evolves from the heterogeneous society fostered by the fusion of countries with different and dissimilar cultures, traditions, conventions, and systems.

Despite the lopsided or uneven economic status of member-states, they have been the major engine of global economic growth over the years. Embracing multiculturalism is necessary but comes with its encumbrances. The likelihood of supremacist ideologies, internal wrangling, politics of majority versus minority, and ethnocentrism may not be far-fetched. In global politics, for example, the dissection of states into global north (super dogs) and global south (underdogs) is palpable. It is therefore not unlikely that hegemonic tendencies, discrimination, and other forms of cultural bias would exist within the BRICS+.

Multiculturalism within BRICS+ presents both challenges and opportunities. As the member-nations continue to navigate the complexities of cultural diversity, their collective experiences and policies could offer valuable lessons for other countries, regions and potential intergovernmental groupings. The prospects for multicultural cooperation in BRICS+ are promising, with the potential to enhance not only internal cohesion but also global influence through a more inclusive and culturally aware approach to international relations. The injection of the idea of multiculturalism into a basically economic, trade and investment-oriented multilateral organization may be a new or novel idea. More importantly are the future projections of the positive and negative angles to the actualization of this concept.

Supremacist ideologies and cultural imperialism go parri passu. Russia is a prime member of BRICS+ and going by her antecedents, this study reveals there are tendencies on the long run, for her to lord her superiority over the others especially the countries in the third world.

The issue of human rights and cultural autonomy should be given prominent consideration. As BRICS+ nations navigate multiculturalism, the international community is prone to monitoring how these countries manage cultural and ethnic diversity, particularly in places where there are suspicions or outright allegations of repression and human rights abuses. China and Russia are two major powers in the group and they are socialist and mildly authoritarian.

A thought is given to the conception of digital multiculturalism in that the evolution and rise of digital technologies have provided new spaces for cultural interaction and expression. Digital content productions, social media platforms (such as WhatsApp, WeChat, LinkedIn, Facebook, Thread, X, Instagram, etc.), and online communities, form critical tools in shaping multicultural identities and narratives in BRICS+ countries. On the flipside, it also raises important concerns about digital divides and the potential for cultural homogenization through global media. Another aspect of concern is the strict regulation of social media use by China.

Migration within and between BRICS+ countries is another emerging issue. Free movement of persons and goods are a major factor for a moving economy although it comes with its constraints. It might lead to a rush in the spate of emigration from the less-economically developed countries and countries in the third world, to the well-developed countries. There are implications to all of these. Economic disparities and conflicts drive migration, leading to the growth of multicultural urban centers and a spike in cultural diversity. This migration therefore presents both opportunities for cultural exchange and challenges related to cultural integration and social cohesion.

Another key issue is the discourse on achieving a balance between integration and assimilation within the BRICS+. Integration implies that diverse cultures find their foothold without being submerged by a seemingly superior culture thereby maintaining each country's distinct culture and identity while assimilation connotes that minority culture would be subsumed under a dominant or major culture. While countries like Brazil and South Africa have leaned towards multiculturalism, thereby promoting diversity as a national strength, China and Russia support assimilation, with strategies and guidelines for action that are targeted at breeding a integrated national identity, sometimes putting minority cultures at risk. If this holds sway, cultural imperialism is the result.

Equity and equality are two major concerns that should be paid attention to by the major powers in BRICS+. Toloraya (2016) considers the very idea of bringing disparate countries together as a weakness of BRICS and that each country puts its interest first. He expresses the opinion that the members are all at different development levels and have different political regimes (both democratic and authoritarian). Toloraya also points out that there are long-standing geopolitical conflict between China and India and the fact that the members have varying levels of relations with the United States and Western Europe. It is noteworthy that the BRICS institutions—the New Development Bank (NDB) and the Contingent Reserve Arrangement (CRA), which were established as copies of the Bretton-Woods institutions (World Bank and IMF)—use consensus rather than majority voting rules to decide on important issues in the CRA and operate an equal-weight system rather than a weighted voting system in the NDB (all five BRICS countries have equal shares and voting weights regardless of the significant differences in their economic weights) (Luo & Yang 2022).

According to them, the consensus rule and the equal-weight scheme are both firsts for multilateral financial institutions worldwide. The Asian Development Bank, the World Bank, the IMF, and even the Asian Infrastructure Investment Bank (AIIB) all use majority voting procedures and weighted voting methods.

However, with the new additions to the organization, there are speculations that status quo may not remain the same.

Stemming from the foregoing is a puzzle raised by Tripathi (2023) about a common currency in the organization. As impractical and premature as it may sound, trading in national currencies is becoming a reality. With the rupee-designated oil transaction between India and the United Arab Emirates, there are indications that the petrodollar arrangement that has prevailed since 1973 may be confronting a threat soon. It as well signals that the world's major commodity importers and exporters might make an attempt at lowering their dependence on the dollar. The BRICS expansion appears to be an attempt at an alternative world order, one with a more sympathetic ear for the developing many versus the developed few thereby shaking the predominance of the extant global order.

The question of sustainability comes to fore in the policies and practices of BRICS. As welcoming, accommodating and endearing as the policies are, it is not unfounded to presume that changes might take place as they enlarge, expand and attract more members. More so, the question of who joins the BRICS+ as a member may not be as important as who holds the key to decisions on policy positions. Policymaking may not turn out to be an easy exercise as a result of the consensus-driven decision-making process of the BRICS+, however, the attempt to democratize it would be a concrete effort.

Challenges of Multiculturalism in BRICS+

The ethnic, cultural, and religious levels of diversity within the BRICS+ is immense, yet expected. Aside these, they also have different political and economic systems that they practice. This goes to show that they differ in many ways. For instance, while Brazil breeds and emphasizes racial and cultural integration, India supports and promotes a secular, pluralistic society. Post-apartheid policies in South Africa concentrates on reconciliation and inclusivity. Russia and China, on the other hand, have more centralized approaches being socialist-oriented, with significant emphasis on maintaining national unity and often suppressing separatist tendencies among minority groups. The UAE provides a booming business environment accommodating investors and tourists from all climes. Iran is pursuing its ambition of nuclear arms race while Ethiopia is battling issues of internal conflicts. Argentina is struggling with political dysfunction and financial crises hoping that the current leader, President Javier Milei would be able to spin the wheel around positively. India, on its own, is known for its incredible religious and linguistic diversity (with a constitutional recognition of 22 languages) is currently battling sexual violence against women. Egypt has gone through waves of military coups and civil dissents especially during the Arab Spring and other forms of protests, political turnovers, sporadic violence and waves of repression since 2011. Egypt has also been deeply involved in the efforts towards achieving peace in Gaza.

One of the challenges or fears of this association are supremacist tendencies and cultural imperialism, which go parri-passu. Russia is a prime member of BRICS+ and going by her antecedents, this study reveals there are tendencies on the long run, for her to lord her superiority over the others especially the countries in the third world.

Toloraya (2016) refers to Russia as a rogue state and that China is an unwelcome competitor, which threatens the US hegemony. While India is a new power aspiring to establish mutual contacts with the West, Brazil is considered as being economically troubled and South Africa, according to Toloraya, should not be regarded as a full-fledged actor in global geopolitics.

Ethnic and cultural tensions spurred by ethnocentrism can occur in some instances. Ethnocentrism means the feeling that one culture is superior to the other. However, all cultures have their peculiarities and are distinct in their own rights. Member-nations of BRICS+ have domestic issues they are dealing with separately. The diversity within BRICS+ countries sometimes leads to ethnic and cultural tensions. In India, communal conflicts and caste-based discrimination have always persisted. There are tensions in Russia with ethnic minorities, particularly in the Caucasus region. South Africa struggles with xenophobia, often directed at immigrants from other African countries. This has brought her at loggerheads with other African countries a number of times and severed their diplomatic relationship. China faces significant challenges in regions like Xinjiang and Tibet, where cultural repression and human rights issues have drawn international criticism. Internal displacement has become an issue since the war in Ethiopia between it and Tigray in 2021. Rubbles of the conflict still exist today. Iran is still in a war tango with Israel.

The politics of majority versus minority should be considered because the membership of BRICS+ is not on equal basis. Investment, input, impact, commitment and financial contributions to the group are not balanced. Ensuring that all groups feel equally valued and included therefore, requires conscious and continuous effort. Despite policies promoting multiculturalism, instances of discrimination and cultural bias can still occur. However, BRICS+ should be commended for its structure of annual and rotational leadership. This has helped to give the members a feeling of relevance and influence.

The Interest of other African Countries in BRICS+ Membership

South Africa was the only African nation who was on the membership of BRICS+ until 2023 when Egypt and Ethiopia were welcomed as members. While at the 16th annual BRICS Summit hosted by Russia in October 2024, 13 nations were announced as partner countries; Nigeria, Algeria and Uganda being African nations. This emphasizes the burgeoning interest of the Global South in BRICS+ (Bhattacharya 2024). The point of attraction can be surmised to be multi-faceted. According to Famiyesin (2025), using a liberal framework presupposes that Nigeria can attain high investment flows, enhanced trade, and technological transfer through multilateral mechanisms like the New Development Bank (NDB) and the BRICS Business Council. This also comes as the Global South seeks other alternatives to the conventional North-South relations. In further discussing this from the Nigerian viewpoint, there are mutual benefits attached to her membership. Nigeria's engagement with BRICS+ is a channel for accessing alternative development financing to support critical and major infrastructural projects. Her active participation also presents a strategic shift towards diversifying her international relations and positioning Nigeria as a key player in the evolving global

economy. On the other side, BRICS+ members would be able to relate better with Nigeria being members of the same body.

Another implication of the interest of African countries in BRICS+ is that it presents an opportunity for them to reduce their dependence on Western powers and forge more formidable alliances with emerging economies, especially in a multi-polar world and with the emergence of new global powers. IMF and World Bank place heavy tasks, conditionalities and burdens on African countries when they want to obtain loans and so, BRICS+ presents just a more suitable alternative for them. However, the twisted dimension to this development is the superiority game between BRICS+ and the Bretton-Woods institutions or between the former and North Atlantic Treaty Organization (NATO).

A note of caution to interested African nations is that they should ensure internal security and stability in their polities, economies and societies.

Future Prospects of BRICS+

A significant quota of the world's population and economic activities is what BRICS+ occupies and controls. Obviously, the member-nations are diverse in nature and culminate in a wide array of cultural, social and political origins. A proper understanding of the prospects of multiculturalism in this global association involves a discourse about their internal differences and the forms of collaborations they undertake at the international arena. It also attempts a forecast of the likely future explorations, achievements and challenges of the group.

First off, it is pertinent to understand the distinct history, colonial antecedents, migration patterns, and cultural uniqueness of each of the states. For instance, while Russia hosts many ethnic groups and languages, China has diverse ethnic minorities within a predominantly Han Chinese population. South Africa may never be able to stave off its post-apartheid history and its mix of African, Asian and European cultures with 11 official languages. Brazil, on its own, is the melting pot of African, European and other indigenous cultures. While India strikes remarkably for its religious and linguistic diversity, Saudi Arabia runs a monarchical system and is a deeply religious state with it being the fifth largest country in Asia but the largest in the Middle East. Ethiopia is reputable for hosting the headquarters of the African Union (specifically in East Africa) and located in the region popularly known as the Horn of Africa in the East African sub-region. Argentina, which is a republic, is known for speaking Spanish, English, Italian, German and French as official languages. More so, it was an overseas territory of the Spanish Empire. Egypt, officially known as Arab Republic of Egypt, is also one of the new additions to the group and is typically regarded as one of the homes of principal civilization of the ancient Middle East. The United Arab Emirates is a federation made up of seven emirates, possessing record-breaking attractions and comprises 80percent expatriate population from over 200 nationalities. Last but definitely not the least is Iran which is officially an Islamic republic, has a Muslim majority population and is one of the oldest nations in the world with a history dating back tens of thousands of years (Summaya 2023).

In addressing cultural diplomacy on the global stage, Cummings opines that the United Nations Educational, Scientific and Cultural Organization (UNESCO)

acknowledges that the multilateral arena is particularly essential for cultural diplomacy, with some states consistently and increasingly investing in global or regional forums. It traces the existence of cultural diplomacy in the multilateral sphere to the age of World Expos, which began in 1851 in the United Kingdom. More so, Expos began to connect cultures and present national achievements in all domains of human engagements and activities and since the year 2000, the main UN agendas have guided the selection of Expo themes although it was originally conceived to promote industry and national identity. Acknowledging that cultural diplomacy, which is a dimension of soft power is the exchange of ideas, information, art, and other aspects in a bid to nurture shared understanding (Cummings 2003), BRICS+ nations can leverage their cultural diversity as a form of soft power in international relations. Through initiatives and forums like educational exchange programs for students, cultural exchange programs, collaborative film festivals, art exhibition and tourism, cultural diplomacy can be harnessed to strengthen ties among BRICS+ nations and with other parts of the world.

Multiculturalism can enrich economic collaboration. When multiple and diverse perspectives and practices collide, they can birth creativity and innovation. The consumer markets in the various BRICS+ nations present diverse needs and opportunities (possibly as a result of cultural preferences) to cater for a large mixed market and this can promote trade and economic growth.

As a multilateral organization, multiculturalism contributes to a more inclusive approach to global governance. As these countries take on more significant roles in international institutions, their diverse cultural perspectives can influence global norms and policies, potentially leading to more equitable and representative global governance structures. Despite negative and discouraging feelings expressed in some quarters about the viability and validity of BRICS+, it seems to be expanding its area of coverage. For instance, in 2016 at the 8th BRICS summit in Goa, India, matters relating to energy, health, trade, education, agriculture, space utilization, and other common spaces, development of humanitarian contacts and tourism, banking cooperation, the fight against poverty and social inequality were discussed. In addition to the Declaration, a number of sectoral agreements were signed to concretize their actions. The leaders of BRICS came to a consensus to launch a variety of new areas of cooperation, initiated by the Russian Presidency as they delve into the field of migration, youth, industry, environment, energy, peacekeeping, fight against infectious diseases etc.

Gradually and over time, BRICS+ could work towards building a common or bounded identity that respects the cultural differences of its members while highlighting shared goals and values. This could foster a sense of solidarity among BRICS+ nations, making multiculturalism a central part of their collective identity; recognizing individual identities and creating a BRICS+ identity, not aimed at supplanting the individual nations' identities but to build a rallying point of identification for members. This could come as slogans, anthem, declarations, unified color, flag or logo. Future summits can feature attendees dressed in their indigenous attires with a special BRICS+ badge or sash, with local cultural displays and exhibitions.

Issues arising from a cultural mix and focusing on dimensions by which a peculiar BRICS + global branding devoid of cultural imperialism can be created. It also proposes the idea of bounded identity in the face of cultural disparities as multiculturalism is able to breed recognition and respect for cultural diversity and cross-cultural interactions that can further enhance the principles of tolerance, equity and equality, and mutual universal pluralism. Their influence on the global stage is based on the BRICS+ countries' expanding economic potential, their significance as one of the primary forces behind global economic development, their sizeable population, and their abundance of natural resources.

Conclusion and Discussion

This study has discussed multiculturalism as a feature of BRICS+ being a multilateral, inter-governmental organization characterized by racial, ethnic, cultural and lingual varieties. Despite these disparities, conscious efforts can be put together to enjoy the prospects of multiculturalism within BRICS. This requires a careful navigation of both opportunities and challenges. By promoting cultural exchange, respecting diversity, and addressing social inequalities, BRICS+ can enhance multiculturalism both within their countries and in their collective global influence, being a dynamic and inclusive approach that values the diversity of cultures within a society. The success of these efforts will depend on the willingness of member-states to embrace cultural diversity as a strength and to incorporate it into their national and international policies. The expansion of BRICS+ is hinged on building attractiveness through developing inclusive policies, fostering a more innovative, vibrant, and harmonious community and modeling successful multicultural cooperation and understanding.

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Ethics Statement

The authors affirm that this research was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The authors declare no conflict of interest.

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ASSESSING THE EFFECTIVENESS OF UNITED NATIONS HUMANITARIAN INTERVENTIONS IN THE DEMOCRATIC REPUBLIC OF CONGO, 1999-2024

HALIDU AGABA* 
University of Abuja

AARON AYETA MULYANYUMA** 
Makerere University

CHARLES AKINSOLA*** 
University of Abuja

YUSUF ABDULGANIU ADEGBITE**** 
University of Abuja

Abstract

This paper evaluates the success of the UN's humanitarian interventions in the DRC ('MONUC/MONUSCO in the DRC' 1999-2024) through the prism of one of the most protracted humanitarian emergencies on earth – its stability aspect. Inspired by Liberal Institutionalism and Human Security theoretical perspectives, the study analyzes how multilateral diplomacy, institutional vulnerabilities, and a human-centric approach to security shaped the DRC humanitarian outcomes. Applying a longitudinal quantitative perspective, the article examines secondary data sourced from UNHCR, FAO, OCHA, and ACLED to test for the presence of relationships between levels of UN intervention and a range of core humanitarian variables, including internally displaced persons, civilian casualties, food insecurity, and delivery of basic services. The results show that while UN interventions have

* **Halidu Agaba** is a PhD and Professor of International Relations in the Department of Political Science and International Relations at the University of Abuja, as well as a visiting professor at Makerere University. Email: agaba.halidu@uniabuja.edu.ng. ORCID: <https://orcid.org/0000-0002-6689-8699>.

** **Aaron Ayeta Mulyanyuma** holds a PhD in Political Science (Social Sciences) and is a lecturer in Political Science and Public Administration at Makerere University. Email: aaron.mulyanyuma@mak.ac.ug. ORCID: <https://orcid.org/0009-0005-3615-5412>

*** **Charles Akinsola** is a research fellow and lecturer in the Department of Political Science and International Relations at the University of Abuja. His research and publications focus primarily on international organizations, humanitarian interventions, and global security. Email: Charlesakinsola30@gmail.com. ORCID: <https://orcid.org/0009-0006-4538-0942>

**** **Yusuf Abdulganiu Adegbite** is a Nigerian scholar and researcher specializing in political science and international relations. He serves as a lecturer in the Department of Political Science within the Faculty of Social Sciences at the University of Abuja. Email: yusuf.adegbite@uniabuja.edu.ng. ORCID: <https://orcid.org/0009-0001-1687-9414>



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significantly alleviated some of the most immediate forms of suffering – saving lives, improving food security, and protecting civilians – their impact overall has been severely undermined by ongoing conflict, poor governance, logistical constraints, and minimal local ownership. Although regression analysis shows a modest positive trend between aid intensity and progress in humanitarian sectors, the durability of this progress is still vulnerable. The study asserts that better integration of humanitarian assistance and peacebuilding, more effective regional cooperation, and improved local governance will be integral in securing long-term peace and stability and human security in DRC.

Keywords: *United Nations, humanitarian intervention, Democratic Republic of Congo, peacebuilding, human security, post-conflict reconstruction.*

Introduction

Since the end of the 1990s, the Democratic Republic of Congo (DRC) has been the stage for one of the longest and most convoluted global humanitarian crises. The country's tumultuous past—characterized by cycles of violence, widespread internal displacement, chronic food insecurity, and social-structural collapse—has consistently tested the capacities of the national government and the international donor community (Autesserre 2010; Prunier 2009). In response, the United Nations (UN) instituted a series of humanitarian and peacekeeping interventions to bring stability to the nation and respond to the deep human misery caused by war. The United Nations Mission in the Democratic Republic of Congo (MONUC), created in 1999, and its successor, the United Nations Organization Stabilization Mission in the Democratic Republic of Congo (MONUSCO), continue to be the linchpin of these international efforts (United Nations 2023). Intended to reestablish peace, shield non-combatants, and assist in rebuilding the state, such operations have developed into some of the most complex and enduring UN undertakings in contemporary peacekeeping history.

More than 20 years of sustained attention notwithstanding, the DRC remains a hotbed of widespread unrest, precarious governance, and recurring humanitarian disasters. Armed conflicts in wilful regions such as North Kivu, Ituri, and Kasai have been continuing, with millions being internally displaced persons (IDPs) and with numerous human rights violations (Stearns 2021; Tull 2018). These realities have called into question the relevance, viability, and strategic coherence of UN humanitarian efforts in the DRC. Humanitarian crises that continue to exist in the face of a large international presence highlight the need not only to assess the UN's operational successes but also the structural limitations that constrain its long-term effectiveness.

The politicized nature of the humanitarian situation in the DRC is deeply intertwined with regional geopolitics, poor state capacity, and competition for natural resources, which have arrested consolidation of stabilization and peacebuilding (Nzongola-Ntalaja 2013). For years, the UN's approach to the DRC has followed the dynamics of a traditional peacekeeping model supported more and more by multidimensional components incorporating humanitarian aid, governance development, and post-conflict rehabilitation (De Carvalho and Schia 2011). This transition mirrors a more general transition in world politics, whereby humanitarian

interventions have come to include enmeshed political, developmental, and security components (Bellamy and Williams 2015). However, whether its mandate is sufficient, its coordination with local actors is effective, and its impact is sustainable, remains hotly contested in the literature as well as in policy circles (Boshoff 2020)

In this way, judging the success or failure of UN interventions in the DRC from 1999 to 2024 will allow us to take stock of both possibilities and constraints of multilateralism within the context of the fragile state. It also allows for the examination of how humanitarian outcomes in protracted crises are influenced by institutional design, resource mobilization, and local ownership (Coicaud 2025). The DRC is a critical case for analyzing the convergence of humanitarianism and peacebuilding and for assessing the abilities of international institutions to provide human security in environments defined by chronic instability.

The analysis of this study is framed within the theories of Liberal Institutionalism and Human Security. Liberal institutionalism focuses on the function of international institutions in facilitating cooperation, mitigating anarchy, and advancing collective security (Keohane 1984). Within this schema, the UN's engagement in the DRC is a manifestation of a collective interest in securing peace through multilateral mechanisms and norm-based interventions. In addition, the human security approach broadens the definition of security from state sovereignty to the protection and well-being of individuals – including concerns about such perceived threat multipliers as war, famine, and epidemics (UNDP 1994). Collectively, these theoretical perspectives afford a rich context in which to interrogate the institutional-scale phenomenon of how institutional

Theoretical Perspectives

The Liberal Institutionalist outlook informs this research, focusing on the significance of international institutions in promoting cooperation, peace, and collective security. It is based on the argument that multilateral organizations such as the United Nations contribute to reducing world anarchy by fostering cooperation, by developing norms, and by allowing humanitarian actions (Keohane 1984; Nye 2009). The UN's role in the DRC through MONUC and MONUSCO in particular mirrors efforts to defend human security, reconstruct governance, and shield civilians, consistent with liberal institutionalism's trust in cooperative systems (Weiss 2016). In this respect, the "Human Security" agenda takes a much wider view of protection from threats that include war, malnutrition, and oppression (UNDP 1994). In relation to the DRC, it emphasises people-centered approaches with a focus on welfare, justice, and dignity. Together, these theories provide a holistic lens through which to analyze how institutional cooperation and human-based approaches influence the UN's success in delivering humanitarian assistance in the DRC (1999–2024).

Problem Statement

Following two decades of intense UN attention, the DR Congo continues to be engulfed in repeated humanitarian disasters, as long-running wars and weak state structures have generated massive displacement. From the formation of MONUC in

1999 to its transition into MONUSCO in 2010, the UN has conducted one of the largest and most complex peacekeeping and humanitarian operations worldwide. These missions have delivered essential humanitarian assistance, enabled elections, and bolstered weak state institutions (Autesserre 2010; United Nations 2023). Yet enduring insecurity, severe food insecurity, and the ongoing displacement of millions argue that the UN interventions, however ambitious in their range, have produced at best mixed and fragile results (Tull 2018).

A fundamental tension arises between short-term humanitarian assistance and long-term human security. Although the UN has alleviated some of the immediate suffering with the provision of food and medical assistance and by protecting civilians, none of these achievements has been transmuted into lasting peace or systemic healing. Poor local ownership, the dearth of integrated humanitarian–peacebuilding programming, and the lack of coherent regional strategies have all contributed to fragility (Boshoff 2020). The unpredictable political economy of the DRC — defined by natural resource competition, regional interventions, and institutional fragility — also restricts the scope for transformative change through external engagement (Nzongola-Ntalaja 2013).

The research, therefore, attempts to tackle the leading question of whether and the degree to which the United Nations’ policy interventions in the DRC over the period 1999 to 2024 have had a positive impact on several key human security measures, including internal displacement, civilian protection, food security, and access to basic services. It probes the connection between the frequency of UN activity and quantifiable humanitarian results to determine if efforts at the institutional level have resulted in substantive, enduring advancements in human well-being. In this process, it aims at identifying the structural, institutional, and contextual limitations that have undermined the success of UN action on the ground and the prospects for developing more integrated and sustainable humanitarian results in long-term conflict environments.

Methodology

The quantitative part of this study adopts a longitudinal approach to examine the success of UN humanitarian operations in the Democratic Republic of Congo during 1999–2024. For selected indicators, including IDPs, civilian casualties, food insecurity, and access to basic services, data will be extracted from recognized repositories such as the United Nations High Commissioner for Refugees (UNHCR) Global Trends, the Food and Agriculture Organization (FAO) Food Security Reports, the Armed Conflict Location & Event Data Project (ACLED), and the Office for the Coordination of Humanitarian Affairs (OCHA) Humanitarian Data Exchange. Descriptive statistics will provide an overview of trends during the 25 years, while inferential methods, including correlation analysis and regression analysis, will be applied to investigate the correlation between the intensity of UN interventions (i.e., troop presence, humanitarian aid) and humanitarian outcomes. This enables a fact-based evaluation of the UN’s performance in reducing human misery, protecting civilians, and facilitating post-conflict recovery.

Literature Review

The UN humanitarian operations have received widespread scholarly attention owing to the long-standing crises of the DRC and the complexity of the international response. The UN missions, such as MONUC and its successor, MONUSCO, have, until now, been central in the provision of humanitarian aid, civilian protection, and the promotion of governance for post-conflict recovery in the DRC (Autesserre 2010; Prunier 2009; Stearns 2021; Tull 2018). However, despite such important efforts, their long-term efficiency was impeded by operational challenges, political interference, and the weak institutional capacity of the Congolese state. These limitations raise critical questions about the sustainability of externally driven peacebuilding and capacity on the capacity of the UN in fostering durable state resilience in fragile contexts.

There is agreement among scholars that the persistence of conflict in the DRC is the result of the predominance of intertwined domestic and regional factors. Regional interference, mineral resource competition, and state-building fragility have constantly undermined the possibilities for peace and stability in a positive light (De Waal 2018; Nzongola-Ntalaja 2013). Even when UN interventions adopt a multi-sectoral approach that merges peacekeeping with humanitarian assistance and governance reform, progress remains partial and uneven; see (Bellamy and Williams 2015). This is partly because many of these interventions fail to address the political economy of conflict and the vested interests of local and regional elites who benefit from instability.

Recent scholarship also highlights that international interventions work best when based on clear mandates, meaningful local ownership, and coherent international and regional engagement (Keohane 1984; Nye 2009; Paris 2001; Weiss 2016). When the mandate is fuzzy—as is the case with MONUSCO, which abstracts peacekeeping to peace enforcement, and peace-building to state-building—the legitimacy and with it the capacity of the mission to function is undermined. In addition, poor cooperation between the UN and the AU, as well as with subregional organizations such as SADC, has resulted in a fractured international response and diminished the coherence of peacebuilding strategies.

While the UN presence has provided essential humanitarian assistance to mitigate some of the violence and displacement, these are tenuous gains. Chronic insecurity, bureaucratic paralysis, and governance failures (Boshoff 2020; Coicaud 2025) have undermined the viability of humanitarian initiatives and the prospects for long-term stabilization. Interventions for scholars like this usually represent doing the provisioning for short-term alleviation of suffering rather than focusing on structural otherworld transformation and are often conforming to international anarchy and ignoring the root causes of conflicts. A cycle of violence, humanitarian collapse, and the redeployment of peacekeepers follows.

Recent studies have expanded the discussion to include the politicization of humanitarianism and the contradiction inherent in international norms and localized practices. (De Carvalho and Schia 2011) has argued that humanitarian interventions serve global political agendas rather than the demands of the populations on the ground, and (Autesserre 2021; Omotola 2025) have pointed to the absence of legitimacy and sustainability when local actors are excluded from decision-making. These critiques demand a reconfiguration of the parade of peacebuilding and more

‘local realist’ humanitarian modeling. The literature largely consistently underscores the need to better align humanitarian assistance, peacebuilding, and post-conflict reconstruction while leveraging regional cooperation and local agency in meaningful ways. As (Evans and Sahnoun 2001; Thakur 2016) suggested, these cohesive approaches will illuminate ways in which the UN's role in fragile states such as the DRC can evolve from transient crisis management to enduring peacebuilding and institutional metamorphosis.

Findings and Discussion

Statistical Trends of Humanitarian Indicators (1999–2024)

A repeated cross-sectional analysis of humanitarian data related to UNHCR, FAO, OCHA, and ACLED (1999-2024) shows a series of trends and patterns related to four indicators: internally displaced persons, civilian casualties, food insecurity, and access to essential services, all leading to evidence of “qualified success” at UN operations, meaning a degree of meaningful humanitarian relief alongside structural weakness.

(i). Concerned with Internally Displaced Persons (IDPs):

The Second Congo War resulted in a sharp increase in displacement, peaking at 3.9 million in 2003 (UNHCR 2024). The creation of the MONUC mission in 1999, and later a series of humanitarian coordination frameworks, initially slowed the rate of displacement between 2004 and 2008. However, a fresh outbreak of fighting in North Kivu, Ituri, and Kasai sparked a reversal of this progress. Starting in 2015-2024, displacement registered fresh records, standing at an estimated 5.7 million internally displaced persons as of 2023 (OCHA 2024). The trends show that, while UN activities limited acute humanitarian emergencies, they were insufficient to avert repetitive instability, thus suggesting a displacement crisis among the DRC that is underpinned by structural problems instead.

(ii) Civilian Casualties:

The data released by ACLED indicated the highest rates of civilian deaths between 1999 and 2003 and 2006 and 2008. The results of the regression analysis indicated a negative correlation between UN involvement and the number of deaths, with $r = -0.42$ and $p\text{-value} < 0.05$, implying that UN involvement, as measured by troop deployment and humanitarian efforts, is significantly associated with lower rates of civilian deaths, including those that occur along humanitarian corridors. The continuation of localized violence, including ADF and M23 insurgencies, highlights the patchy deterrence offered by UN peacekeeping missions.

(iii) Food Insecurity:

As per the FAO, peaks of food insecurity emerged periodically around 2002, 2009, 2016, and 2020, marking the occurrence of large-scale conflicts and climate change impacts. A statistical relationship between UN food assistance and nutritional values among households is marked by a relation: 0.58, $p < 0.01$, signifying both effectiveness and urgent requirements. However, a system of persistent food insecurity, market failures, and inadequate structure has obstructed any long-term progress. Slightly over 25 million Congolese remain severely food insecure, as highlighted by FAO documents issued in 2024.

(iv) Access to Basic Services:

OCHA indicators show a degree of improvement in urban water, sanitation, and education with UNDP and UNICEF projects, but regression analysis yields mixed results, showing a degree of improvement, although this is just statistically significant at the 0.05 significance level with an *r*-value of 0.35, indicating a partial, rather than total, improvement. The areas around Tanganyika and North Kivu, which are characterized by a lack of security, are still relatively unserved, consistent with past results explaining humanitarian improvement trends in this region.

Discussion and Conclusion

The evidence illustrates that UN interventions in the DRC are “qualifiedly successful”: successful at a humanitarian level, yet limited by the structural constraints in building a lasting peace and transformative change. The structural constraints are attributed to three main related dynamics: “(1) ambiguous mandates, leading to confusion between, or among, peacekeeping, state-building, or fighting insurgents; (2) a reliance on funding agencies, their bureaucratic arrangements, and low capacity to react adequately and quickly enough to a deteriorating situation; and finally, (3) weak state institutions, unable to absorb the external support or make an easy transition from humanitarian to development activities” respectively (Autesserre 2010; De Waal 2018; Omotola 2025). However, the persistence of all these challenges suggests that UN interventions are themselves caught up in a reactive approach, one that deals with symptoms, rather than causes, of conflict and instability.

To break out of this cycle, a reformulated mandate with a focus on flexible, rather than one-size-fits-all, engagement may well help to better align UN peace enforcement with mediation activities. A hybrid strategy, whereby UN engagement is combined with regional frameworks, as well as including participation by civil society groups, may well enhance responsiveness while helping to alleviate “local disconnection” as a problem, as described by (Autesserre 2021), as an issue maintaining UN inconsequence in conflict-ridden zones, including the DRC. Still, although UN interventions have overwhelmingly resulted in saving countless lives and providing vital humanitarian relief, they have by and large failed to change the structural dynamics propelling the cycle of violence and vulnerabilities in the region. A refashioned approach to intervention action will offer hope toward securing a better transformation of “qualified success” into a genuinely stable DRC.

Assessing the Impact of UN Humanitarian Activity

The results show that the United Nations' engagement in the DRC yielded mixed outcomes in terms of the delivery of humanitarian services. Multilateral coordination in line with Liberal Institutionalism on the ground through MONUC/MONUSCO, WFP, and UNHCR was instrumental in introducing an element of cooperation among a variety of antagonists and undermining old habits by delivering an immediate relief of suffering in the form of food (among other things), health campaigns, and protection (Keohane 1984; Weiss 2016). Yet the ongoing humanitarian disaster underscores the limits of institutional capacity in an environment marked by structural and political fragility.

Successes:

1. Emergency Relief and Protection: Rapid, effective UN action contributed to the

salvation of millions of lives, notably in the context of acute displacement crises. The deployments of MONUSCO marked a considerable increase in civilian attacks in affected areas (United Nations 2023).

2. Health and Nutrition Achievements: Collaborative efforts between WHO, WFP, and UNICEF had a positive impact on decreasing the prevalence of malnutrition and increasing immunization rates in reachable areas.

3. Institutional Co-ordination: The formation of humanitarian clusters enhanced efficiency in operations, exchanges of information, and coordination between agencies.

Limitations:

1. Lasting Humanitarian Dependency: Even after two decades of involvement, over 6.8 million IDPs and 25 million people continue to require humanitarian assistance (UNHCR 2024). It signals reliance on external assistance in the absence of systemic resilience.

2. Weak Local Ownership: Local structures were often bypassed in humanitarian programming, constraining their sustainability and accountability (Boshoff 2020).

3. Conflict and Governance Challenges: Persistent armed conflict and rent-seeking diluted the success of interventions, while governance fragility jeopardized peacebuilding endeavours (Nzongola-Ntalaja 2013).

Quantitative Analyses: Regression and Correlation Results

= Statistical analyses confirm a mixed profile of results for UN interventions:

- 1) Troop Presence and Civilian Safety: Regressions corroborate that additional troop presence is correlated with a decrease in the number of civilian deaths ($\beta = -0.38$, $p < 0.05$), consistent with the UN's protective mandate. But incremental returns evaporate in highly unstable countries, where state power is feeble.
- 2) Humanitarian Aid and Food Security: The ($\beta = 0.54$, $p < 0.01$) positive association between the quantity of aid and severity of malnutrition indicates real albeit spatially confined gains.
- 3) Aid Intensity and Access to Services: Although service provision experienced a modest overall enhancement ($\beta = 0.29$, $p < 0.05$), the quality of services continued to be sporadic, suggesting that logistical and security challenges limit uniform progress.

These results reinforce the Human Security model—interventions need to go beyond crisis management to treat the root causes of human fragility (Paris 2001; UNDP 1994)

Integrative Discussion: Connecting Humanitarian Outcomes to Theoretical Frameworks

The DRC case demonstrates that institutional cooperation (Liberal Institutionalism) and human-centered security (Human Security) are both necessary and sufficient components, but they cannot simply be regarded as doubles in an equation. The UN interventions mitigated the immediate suffering but did not break the structural sources of insecurity — primarily state collapse, militarization, and regional interventionism.

The study confirms empirically that humanitarian results did improve as the level of

intervention increased, but that the durability of those results was linked to whether peacebuilding and governance work occurred alongside relief work. In places where MONUSCO backed community reconciliation and reintegration schemes (like DDR programs in North Kivu between 2017 and 2021, the gains were indeed more lasting (Stearns 2021). In contrast, those regions that rely increasingly on emergency aid collapsed back into crisis as the money dried up.

Therefore, the key theoretical contribution is that the effectiveness of humanitarianism in protracted conflicts is dependent on combining institutional coordination, local empowerment, and long-term governance reform. This echoes (Bellamy and Williams 2015) contention that sustained peace in fragile states necessitates seeking the convergence of humanitarian relief with structural peacebuilding activities.

Conclusion and discussion

In sum, the study reveals that although UN humanitarian interventions in the DRC (1999–2024) produced vital immediate human security dividends in terms of saving lives, enhancing access to food, and delivering basic services, the scope for transformative change was, and is, very limited. The evidence suggests that by failing to tackle the sources of fragility – corruption, exclusion, and regionalized violence – UN interventions risk entrenching cycles of dependency rather than cultivating sustainable peace.

The results are therefore consistent with a view of the UN's involvement as a qualified success: effective in responding to and protecting in emergency contexts, yet hampered by profound structural governance deficits and weak indigenous capacity, and lacking any meaningful, coherent, long-term integration through viable humanitarian-peacebuilding linkages.

Collectively, these results suggest that the United Nations has achieved mixed but trackable success in its humanitarian interventions in the Democratic Republic of Congo over 1999–2024. While the UN's contributions to emergency relief, civil protection, and the enhancement of basic service provision have saved lives and alleviated short-term human suffering, the continuation of high rates of internal displacement, chronic food insecurity, and impaired service provision reflects the structural and contextual impediments that limit overall efficacy. Quantitative evidence shows a positive association between the intensity of intervention and improved humanitarian outcomes, but the effect is not homogenous across regions and over time, indicating the constraining effect of persistent armed conflict, poor governance, and logistical challenges in conflict-ridden areas. These results highlight the fact that humanitarian actions alone cannot bring stability over time if they are not accompanied by the mitigation of root causes of conflict and systems fragility.

In light of these findings, it is advised that the UN improve the efficacy and sustainability of its interventions through a greater degree of integrated and flexible theorizations of change. This should involve a focus on anticipatory and preventive actions, on partnerships at the local level, for improved access and accountability, and on working more closely with national and regional actors to confront structural concerns. To maximize impact, continued funding, strong monitoring and evaluation

systems, and specific assistance to vulnerable groups in isolated and war-torn areas are needed. In the end, aligning humanitarian work with longer-term peacebuilding, governance reform, and development efforts will be necessary to have meaningful and lasting results of UN efforts in the DRC.

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Ethics Statement

The authors affirm that this research was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The authors declare no conflict of interest.

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DIGITAL COLONIALISM AND THE REPRODUCTION OF HEGEMONY IN AFRICA: A POSTCOLONIAL APPROACH

ASMA HEMAIDIA* 
Boumerdes University

KHADIDJA BOUAMER** 
Boumerdes University

Abstract

This article presents a critical analysis of contemporary manifestations of digital colonialism in Africa, focusing on how global technology powers reproduce traditional patterns of domination through modern digital infrastructures and platforms. Drawing on a postcolonial analytical framework, the authors examine how data extraction, technological dependency, and regulatory asymmetries reinforce new forms of digital hegemony across the continent. The study argues that Africa's digital vulnerability stems from structural inequalities and external control over data, networks, and governance models. Through an analysis of various national and pan-African initiatives, the article explores both the successes and limitations of current efforts to achieve digital sovereignty. Finally, it proposes a comprehensive set of counter-strategies—including technological innovation, policy harmonization, and epistemic decolonization—that could enable African nations to reclaim their agency and build an autonomous digital future. This research contributes to the critical discourse on power, technology, and postcoloniality in the digital age within the African context.

Keywords: *digital colonialism, hegemony, digital sovereignty, resistance strategies, postcolonialism, Africa, digital vulnerability, submarine cables.*

Introduction

In the late 19th century, Africa witnessed a geographical division during the Berlin Conference (1884-1885) between European colonial powers. Today, Africa faces a new form of reshaping, represented by the delineation of its digital space by major tech companies, particularly from the United States, Europe, and China. However, unlike

* **Asma Hemaïdia** is an Associate Professor of the Department of Political Science of the Faculty of Law and Political Science at University of Boumerdes. Email: a.hemaïdia@univ-boumerdes.dz. ORCID: <https://orcid.org/0009-0002-0682-0571>.

** **Khadidja Bouamer** is an Associate Professor of the Department of Political Science of the Faculty of Law and Political Science at University of Boumerdes. Email: k.bouamer@univ-boumerdes.dz. ORCID: <https://orcid.org/0009-0007-6256-9437>.



traditional tools of control, this modern form of domination occurs through the control of critical digital infrastructure, such as undersea internet cables, operating systems, social media platforms, and artificial intelligence applications, thus reproducing forms of colonial influence in a contemporary technological format, which is referred to as digital colonialism.

In the stage of the rapidly accelerating digital revolution worldwide, Africa has emerged as a theater for a new conflict that goes beyond the traditional borders of colonialism, entering the era of digital colonialism, which reproduces domination through digital tools and technologies. Digital colonialism extends beyond economic dependency to encompass epistemic and technological domination, whereby African data, knowledge, and digital behaviors are appropriated to reinforce global hierarchies of power and control. Despite the growing global debate on digital transformation, limited scholarly attention has been devoted to examining how global technological infrastructures reproduce colonial asymmetries under the discourse of connectivity and innovation. This research therefore aims to bridge the gap by examining the mechanisms through which digital technologies perpetuate existing structures of dependency and marginalization within African contexts.

This reality raises crucial questions about the nature of digital colonialism, which reproduces old patterns of exploitation through modern technological means—posing a renewed threat to Africa's autonomy and allowing major corporations to control the continent's digital future much like traditional colonial powers once controlled its territories. It also raises questions about how digital vulnerability reinforces this control and limits Africa's capacity for technological self-determination.

To address this issue, the analysis adopts a postcolonial approach to deconstruct the colonial dynamics inherent in the spread of information and communication technologies, revealing how these technologies reproduce historical hierarchies of power and domination on the continent. This approach allows for a multidimensional analysis of digital colonialism that highlights the intersection between technology, sovereignty, and knowledge production.

Thus, the paper seeks a critical examination of the implications of digital transformation in Africa, questioning the manifestations of digital colonialism where foreign companies exploit Africa's digital resources. It also aims to analyse this phenomenon from a postcolonial perspective, reviewing the manifestations of digital colonialism and presenting strategies for digital resistance and liberation that enhance the continent's digital sovereignty. Finally, the paper explores the complex dynamics of digital communication in Africa, shedding light on issues of power, control and sovereignty in the digital age. To reach these objectives, the study adopts a qualitative methodological framework that combines both descriptive and analytical methods. The descriptive method provides a detailed account of the various manifestations of digital colonialism and Africa's structural digital vulnerabilities, while the analytical method critically examines the underlying power relations, external dependencies, and epistemic hierarchies that sustain these dynamics. Through this dual method, the study seeks to deconstruct the mechanisms of digital domination and explore the strategies through which African states can strengthen their digital sovereignty and technological autonomy.

Accordingly, the paper is structured into three main sections: the first explores Africa's transition from classical to digital colonialism; the second examines digital vulnerability and the manifestations of digital domination in Africa; and the final section discusses strategies of resistance aimed at deconstructing digital colonialism.

Africa: from Classical to Digital Colonialism

This section explores the historical background of colonialism and the role companies played in it. The aim is to compare traditional colonialism in the 19th century with digital colonialism in the 21st century. It also defines the concept of digital colonialism, explains why data is regarded as a valuable resource comparable to natural resources, and analyses how big tech companies and their affiliated governments exploit it to advance their strategic interests.

Historical Background of Colonialism in Africa

During the 19th century, African countries were subjected to intense imperial aggression from European powers, manifested through military invasions, the appropriation of land, systematic economic exploitation, acts of genocide, and the forcible extraction of natural resources. This wave of colonialism emerged after the transatlantic slave trade ended and was formally structured during the Berlin Conference (1884-1885), where colonial powers agreed to divide Africa among themselves. In this period, arbitrary colonial borders were drawn, often based on racist ideologies that viewed Africans as backward and in need of European guardianship until they could supposedly govern themselves - an idea captured in Edward Said's concept of Orientalism (Onyango Ouma 2025).

By the year 1900, nearly 90% of African territories had been colonized by European powers including France, Britain, Germany, Italy, Belgium, Portugal, and Spain. This period came to be known as "The Scramble for Africa." As capitalist economies developed, a belief grew that the economic - and even political- future of industrial nations depended on exclusive access to markets and raw materials. Even the infrastructure built in the colonies was mainly designed to extract and export natural resources.

Companies played a pivotal role in this colonial expansion. They helped achieve imperial economic goals and acted as tools for generating extra profits through exploitation. Over time, these companies became increasingly involved in the governance of the colonies, evolving into powerful entities that played a central role in plundering Africa's mineral and agricultural resources for global economic gain. (Dahiya 2023)

Thus, European colonialism was largely driven by a deep desire to serve the industrial capitalist system -through the exploitation of African people and the theft of their lands and wealth. This laid the groundwork for what later became neo-mercantilism, where colonial powers, directly or through privileged commercial companies, took over African territories and resources to serve their own economic interests (Coleman 2019, 419-421).

Digital Colonialism

Just as Africa was subjected in the past to traditional colonialism, where its territories were divided among imperial powers and its natural resources and raw materials exploited, accompanied by the construction of infrastructure such as railways to facilitate the export of wealth (Kwet,2019), the continent today faces a new form of colonialism that reproduces dominance through more modern tools. This new form, known as digital colonialism, relies on using technological advances and the Fourth Industrial Revolution to build digital infrastructures, including social media platforms and communication networks, with the explicit aim of collecting and exploiting data for commercial profit or various other purposes. (Coleman 2019, 423)

Digital colonialism is defined as the decentralized extraction and control of citizens' data -whether with their informed consent or not- through communication networks developed and owned by Western tech corporations. It is also referred to as "the use of digital technology to achieve political, economic, and social dominance over another nation or territory" (Kwet 2021). In this sense, the key players in digital colonialism include: (Hendricks, Vestergaard and Marker 2018):

1. Western tech companies: These companies develop and provide the technologies and infrastructures that enable data extraction, targeted advertising, and dissemination.
2. Advertising and consulting firms: These actors use the technologies provided by tech companies to micro-target specific groups with tailored ads and messages for commercial gain.
3. Local corporations, political parties, and organizations: These groups pay advertising and consulting firms to advance their agendas domestically, relying on infrastructures and data collected by Western tech companies.
4. Citizens: Individuals, knowingly or unknowingly, serve as sources of data for tech companies and become targets of personalized advertising and agendas promoted by local actors.

In his 2019 article "*Digital Colonialism: U.S. Empire and the New Imperialism in the Global South*", Michael Kwet explains:

"Within the framework of digital colonialism, foreign powers-led by the United States-install infrastructure in the Global South designed primarily to serve their own interests. This enables them to impose economic and cultural dominance, along with private forms of governance. To fulfill this agenda, major corporations design digital technologies that ensure their control over the essential functions of the digital ecosystem. This allows them to extract profit through rent (in the form of intellectual property or access to infrastructure) and surveillance (in the form of big data), while maintaining control over the flow of information (such as news distribution and streaming services) and social activities (like social networking and cultural exchange), in addition to various political, social, economic, and military functions mediated through their technologies" (Kwet 2019, 7-8).

Thus, digital colonialism refers to a contemporary phenomenon in which powerful Western tech companies exploit and control individuals' data, particularly in the Global South, through the infrastructure and technology they provide. This concept draws parallels with historical colonialism in its classical sense, where empires extracted

natural resources and exploited local labor for their own economic gains. In the context of digital colonialism, Western tech companies create communication networks and platforms, such as social media, to collect vast amounts of user data. This data is then used for various purposes, including targeted advertising and predictive analytics

Data as a New Resource for Colonialism

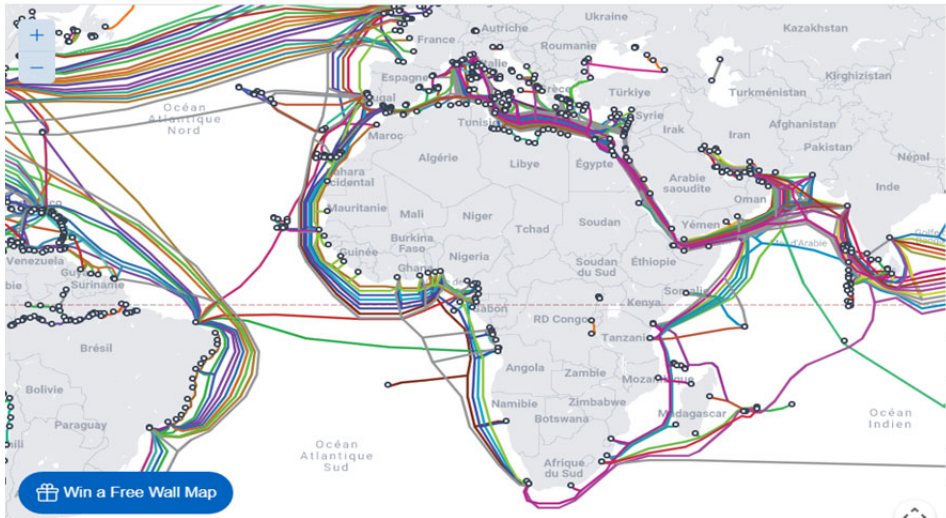
Today, data has become a global currency. Access to data is now the most valuable commodity for both states and corporations -surpassing natural resources, wealth, and even advanced weaponry. Data can be extracted and sold as a product to companies and political organizations whose profits rely on targeting specific audiences, whether to promote political agendas or sell customized consumer products. For example, the CEO of Cambridge Analytica revealed that personal data from around 50 million Americans was used to help Donald Trump win the 2016 U.S. presidential election. (Dahiya 2023).

In the 19th and 20th centuries, colonial powers built critical infrastructure like **railways** to extract and trade natural resources from their colonies. Today, tech giants such as Facebook and Alphabet (Google's parent company) are building digital infrastructure - not to uplift societies or ensure long-term economic prosperity, but to benefit from increased use of their digital services. (Dahiya 2023)

The creation of vital communication infrastructure by Western tech companies, aimed at harvesting and controlling untapped data, marks the front line of a new form of cultural and economic dominance. In many African countries, where infrastructure is underdeveloped, data protection laws are weak, and competition is limited - combined with longstanding political, social, and economic imbalances, as well as decades of resource exploitation - this dominance becomes even more pronounced (Kwet, 2019, 7-8) Africa's market of over 1.25 billion people represents a goldmine of untapped data, offering tech companies enormous opportunities to dominate the digital space, increase profits, and leverage this control economically, culturally, and even politically (Coleman 2019, 424).

Projects such as "Google's Equiano cable" and "Meta's 2Africa network" are emblematic of this transformation. While marketed as initiatives to "connect the unconnected," they effectively extend the reach of Western corporations into African digital space, consolidating their control over connectivity, data routing, and cloud services. Similarly, China's "Digital Silk Road" initiatives and Huawei's partnerships across Africa create parallel systems of dependency-offering infrastructure but embedding surveillance and political influence.

This situation echoes the ideas of "Eduardo Galeano" in his book *"Open Veins, of Latin America"* (1973), where he describes the economic exploitation of Latin America by global colonial powers. Today, we can speak of "digital veins"-as shown in Map 1- stretching across oceans, connecting a global tech ecosystem owned and controlled by a handful of corporations, most of them based in the United States, but still driven by the same old motive: the exploitation of newly colonized digital populations (Dahiya 2023).

Figure 1. Map of 2024 Submarine Cables in Africa

Source: TeleGeography 2025

The map of submarine cables reveals that more than 80% of Africa's connectivity infrastructure is owned or managed by Western or Chinese companies, causing the majority of African data to flow through control centers located outside the continent. This control over digital arteries reproduces the logic of classical colonialism in a new digital form, where natural resources are replaced by "data" as the primary source of economic and epistemic domination. Accordingly, Africa's "digital veins"—the submarine cables and data routes linking the continent to the rest of the world—no longer carry minerals or raw materials but information, which is extracted and monetized elsewhere. In this sense, submarine cables operate not as neutral technological infrastructures but as instruments of digital colonialism that perpetuate dependency and undermine Africa's ability to exercise full technological and epistemic sovereignty (Mwema and Birhane 2024).

From this perspective, a postcolonial approach provides a comprehensive framework for understanding digital colonialism as both a technological and political phenomenon, highlighting its implications for sovereignty, governance, and resistance in shaping Africa's digital future (Masters 2021; Ayodele 2021).

Digital vulnerability and the Manifestations of Digital Domination in Africa

In the context of digital vulnerability and the limited capacity of African states to achieve digital sovereignty, these countries have become increasingly vulnerable to digital colonialism. This form of domination manifests in several ways and has been further reinforced by a combination of political and technological factors. In this section, we will explore the main features of digital colonialism in Africa, while also examining the underlying reasons that have contributed to its entrenchment and the reproduction of historical power relations in new, digital forms.

The Manifestations of Digital Colonialism in Africa

This section explores the manifestations of digital colonialism in Africa, highlighting the multiple ways in which the colonial legacy continues to shape the continent's digital reality. It analyses both the explicit and implicit forms of digital colonialism, aiming to reveal the complex obstacles that restrict Africa's full participation in global digital development.

Control over Digital Infrastructure

One of the clearest manifestations of digital colonialism in Africa is the control and ownership of critical digital infrastructure by foreign powers (Coleman 2019, 417). This control results in unequal data flows and power dynamics that echo the structures of traditional colonialism. Current submarine cable projects and internet infrastructure, largely owned, controlled, and managed by major Western tech companies, are often presented under the guise of “bridging the digital divide” and offering technological assistance (Atintande et al. 2020, 42). However, such arrangements can have long-term implications for the continent's economic, political, and financial stability. While digital infrastructure is crucial for developing Africa's digital landscape, its domination by external actors leaves it vulnerable to exploitation and turns it into a tool for what some have described as “imperial control over the structure of the digital ecosystem” (Kwet 2019, 8).

A striking example of the risks associated with Western and Chinese infrastructure projects is the African Union headquarters in Addis Ababa, built and financed by Chinese banks and companies. It was later discovered that its electronic systems had been compromised for the first five years of operation. If China was able to monitor the continent's most important regional organization, it raises serious concerns about the possibility of similar surveillance activities being carried out in other African countries (Atintande et al. 2020, 44).

China, which is now the primary supplier of both undersea and terrestrial fiber-optic cables across Africa, facilitates large-scale data transfers via the internet. For instance, *China Mobile* is helping develop “2Africa,” a 45,000-kilometer-long submarine cable that became operational in 2024 (Mwema and Birhane 2024, 5) (see Figure 2A). It aims to directly connect Africa to the Middle East and support the rollout of 5G and high-speed internet services. However, this close integration of African telecom and data centers with China has raised concerns about data exploitation and surveillance.

On the other hand, American companies are also vying for influence over Africa's digital infrastructure. *Google*, for example, launched the “Equiano” undersea cable, a 15,000-kilometer project that went live in February 2023 (see Figure 2B). *Meta* is planning to build a cable that will encircle the entire African continent to improve internet access and promote the free flow of information. While such initiatives align with the U.S. value of ensuring free information exchange, it is well known that American intelligence agencies may have access to this data, raising questions about Africa's digital sovereignty (Venske 2024).

What can be said is that these projects -along with other undersea cable initiatives (see Map 1)-reproduce colonial logic. They create a new cost structure that keeps

African countries in a cycle of dependency and debt, while functioning as data extraction infrastructures that deliver minimal benefit to the Global South (Mwema and Birhane 2024, 4). This infrastructural dependency transforms connectivity into a geopolitical instrument, allowing powerful actors to influence domestic policy and information flows under the pretext of technological assistance (Menon 2023).

Figure 2A. Submarine cable 2Africa



Figure 2B. Map of Equiano cable



Source: TeleGeography 2025

Data Exploitation

The dominance of foreign tech companies over Africa's digital infrastructure raises serious concerns about data sovereignty. These companies often store data in their home countries, making it subject to foreign laws and regulations. This limits the ability of African states to control and protect their national data. Such dependence on external data storage and processing is steadily eroding the continent's digital sovereignty and allowing African data to be harnessed in support of foreign economies - with little to no tangible benefit for local communities (Kwet 2019).

The *Cambridge Analytica* scandal, in which Facebook user data was harvested to build political profiles and target voters, clearly illustrates how personal data can be exploited for political and economic gain - often at the expense of both individuals and nations (Coleman 2019).

Digital Discrimination and Cultural Domination

The shift from cultural imperialism to digital imperialism highlights Africa's ongoing struggle to achieve independence in both the cultural and informational realms. Despite technological advancements, the continent remains primarily a consumer -not a

producer -of digital content. This dynamic entrenches informational dominance and perpetuates digital imperialism.

Western tech companies exert significant cultural influence, leading to the erosion of Africa's cultural and linguistic identity. Local languages and traditions are increasingly marginalized in favor of globally dominant-often Western-content (Menon 2023, 383). This cultural erosion reduces the visibility and representation of African voices in the digital space, contributing to digital discrimination against African users and undermining the continent's digital sovereignty and unique cultural character. (Atintande et al. 2020).

According to "postcolonial theory", colonialism is not limited to physical domination; it also encompasses control over discourse and knowledge production (Ilori 2024). Within this context, African internet users are often shaped as mere "digital consumers" rather than "digital citizens," guided toward consuming digital content and services without meaningful participation in their creation or governance. For example, Facebook's *Free Basics* program*, which offers free internet access, allows for the collection of vast amounts of metadata related to users and their online behavior. At the same time, users are exposed predominantly to Western-oriented content, reinforcing the dominance of a Western cultural model. Critics argue that such initiatives can contribute to a form of "digital colonialism" by controlling users' experiences and directing them toward specific content, thereby limiting the diversity of available digital options and entrenching cultural and informational dependency (Daceus and Bryant 2025)

Digital colonialism in African education also manifests through the dominance of Western tech giants such as Microsoft and Google. These companies exploit the needs of educational systems to expand their influence, providing devices and software and forming partnerships with educational institutions. This often results in the imposition of their platforms and programs on local curricula, potentially undermining local autonomy and the unique needs of African communities. As a result, the educational process is often steered to align with corporate interests rather than the actual priorities of African learners (Menon 2023, 383).

Exploitation of labor

Digital colonialism is also manifested in the extraction of cheap digital labor and raw materials necessary for global technology production. The Democratic Republic of Congo's cobalt mines supply over 70% of the world's cobalt, a key mineral for batteries used in digital devices (Gravett 2020). This reflects a continuity between colonial labor exploitation and contemporary digital capitalism.

Currently, 14 families in the Democratic Republic of Congo are suing companies such as Tesla, Apple, Alphabet, Dell, and Microsoft, accusing them of benefiting from child labor in the cobalt mining industry. The mining process itself often has a

* The "Free Basics" initiative, launched by Facebook, is part of the Internet.org project and aims to provide free access to a limited range of services and websites in developing countries, including several African nations. These services include information on news, health, jobs, and weather, as well as access to the Facebook platform itself.

detrimental impact on the health of workers and the surrounding environment (Kwet 2021).

Economic Dependence

Reliance on foreign technology creates economic dependence, as African countries become reliant on external companies to provide essential digital services and innovations. This dependency can hinder local entrepreneurship and innovation, making it difficult for local tech industries to grow and compete in the market. This leads to:

- **Data Migration:** African data is stored on servers owned by Western and Chinese companies, allowing them to economically exploit it without significant local returns.
- **Digital Extraction:** Just as African natural resources were exploited during the colonial era, today, data and artificial intelligence based on African user behavior patterns are being exploited.
- **Unequal Economy:** Most digital economy applications, such as Uber and Vodafone, exploit local labor while the parent companies retain massive profits outside the continent, as mentioned in the previous point (Kwet 2021).

The resulting economic dependency sustains what can be described as a "digital rentierism", where African economies provide data, labor, and resources, while profit accumulation remains concentrated in the Global North (Venske 2024).

The Impact of External Governance Models

Beyond economic dependence in Africa, digital colonialism also manifests through the transfer and diffusion of "foreign governance models" that reshape how states manage and regulate their digital spaces. The increasing reliance of African countries on "Western technologies and governance frameworks" has profound implications for their digital sovereignty and local specificities (Gravett 2020, 127).

Within this dynamic, both Western and Chinese models compete for normative influence: while Western regimes promote data protection standards that often privilege corporate interests, China's model of internet sovereignty -characterized by strict control and surveillance over digital infrastructures -is being actively exported to the African continent. This diffusion of external governance frameworks risks replacing Africa's emerging regulatory sovereignty with imported systems that prioritize control and surveillance over inclusivity, innovation, and context-specific governance (Salami 2024, 4).

The expanding presence of Chinese technology companies across Africa further underscores the urgency of safeguarding African regulatory autonomy, as the failure of local governments to assert their own interests and values may lead to the gradual adoption of external digital governance models that do not adequately reflect the continent's socio-cultural realities.

Ultimately, the risks of digital recolonization extend beyond technical dependence to include control over infrastructure, data exploitation, cultural dominance, and economic subordination. Strengthening Africa's digital sovereignty is therefore

imperative to mitigate these vulnerabilities and ensure a more independent, equitable, and sustainable digital future.

In sum, digital vulnerability in Africa is not merely a technological challenge but a structural condition rooted in historical inequalities. The manifestations of digital domination -ranging from infrastructural dependence to algorithmic bias -constitute an updated architecture of control. Recognizing and addressing these vulnerabilities is essential for building a sustainable and sovereign digital future (Kwet 2019).

Structural and Systemic Factors Reproducing Digital Colonialism in Africa

Digital colonialism in Africa is not the outcome of isolated technological dependencies; it is sustained by an interlocking set of structural and systemic conditions that perpetuate historical asymmetries in power and knowledge. These factors include technological dependency, fragmented regulatory systems, economic disparities, epistemic subordination, and geostrategic competition. Together, they reproduce the structural hierarchies that define Africa's place in the global digital order.

Technological Dependence

The continent continues to face a profound technological dependence rooted in its limited digital infrastructure. Studies indicate that Africa's technological development remains at an early stage compared with other regions, compelling most countries to heavily depend on foreign technologies, platforms, and expertise to build and maintain their digital networks. This reliance exposes African states to external influence and restricts their capacity to define an independent digital strategy. As Kwet (2019) notes, "the technology, equipment, and systems that connect African people and communities to their data, products, and services" are mainly controlled by Western corporations. Consequently, these external actors exercise disproportionate control over digital platforms and data flows, creating a fertile ground for manipulation, exploitation, and digital subjugation.

Regulatory Gaps

The absence of comprehensive and coordinated regulatory frameworks exacerbates this dependency. The lack of effective national and regional legislation enables foreign actors to exploit loopholes and shape local digital policies. As of 2024, only 36 of the 54 African countries have enacted data protection laws, and merely 26 of them operate independent regulatory agencies (Bouke et al. 2023, 6). The regulatory gap not only weakens data protection but also hinders the development of regional digital governance, leaving the continent dependent on imported legal norms such as the EU's GDPR (Salami 2024).

Moreover, the lack of coordination in digital policies among African nations weakens their ability to enforce digital sovereignty. For example, the African Union Cybersecurity and Personal Data Protection Agreement (AUDPC) faces implementation challenges due to the diversity of legal systems and the absence of comprehensive data protection laws in many member states. This lack of coordination

makes it difficult for African countries to present a united stance in global discussions on digital governance. (Bouke et al. 2023, 14)

Economic Disparities

Deep-rooted economic disparities and skill shortages reinforce Africa's structural vulnerability. Limited investment in digital education and innovation ecosystems reduces the continent's capacity to produce its own digital technologies and applications (Bouke et al. 2023). This deficit sustains a one-way flow of data, capital, and expertise from Africa to global centers of power, reproducing what Venske (2024) calls "digital rentierism"-a condition in which African economies provide raw data and labor while value and profit are extracted elsewhere.

Epistemic Dependency

These economic and regulatory dependencies intersect with epistemic asymmetries-the dominance of Western paradigms of knowledge, language, and digital governance. African digital systems are often designed and operated according to external cognitive frameworks that marginalize local knowledge systems and values (Menon 2023). This epistemic dependency ensures that Africa remains a consumer rather than a producer of digital innovation.

Geostrategic Competition and the 'Digital Scramble for Africa'

Beyond technological and economic dependency, Africa has become the focal point of a new geostrategic rivalry among global powers seeking to dominate the continent's digital future. This dynamic, often described as a "Digital Scramble for Africa", mirrors the colonial "Scramble for Africa" of the nineteenth century-yet it now unfolds in cyberspace rather than on territorial land (Gravett 2020).

The United States and the European Union promote liberal digital governance models focused on market openness and data protection, while China advances a state-centric and surveillance-based digital sovereignty model through its Digital Silk Road initiative. Both paradigms aim to integrate African states into their respective digital ecosystems, resulting in a form of strategic dependence rather than partnership (Salami 2024).

Through the construction of undersea cables, 5G networks, satellite systems, and cloud infrastructures, these external actors seek not only economic influence but also strategic control over data flows, cybersecurity standards, and digital norms. Africa's digital space has thus become an arena for soft power projection and geopolitical competition, where technological aid and connectivity projects often mask deeper agendas of surveillance, dependency, and influence-building (Kwet 2019).

This geostrategic contest reinforces the continent's digital vulnerability and limits its ability to pursue autonomous digital pathways. Unless African regional organizations consolidate a unified digital strategy, the continent risks being further fragmented into spheres of influence governed by foreign digital powers. The "Digital Scramble for Africa" therefore represents not merely an economic rivalry but a new

phase in the global reconfiguration of power-where control over data, infrastructure, and algorithms defines the contours of twenty-first-century sovereignty (Timcke 2024).

In sum, the reproduction of digital colonialism in Africa arises not from technological backwardness alone but from systemic interdependencies that bind the continent to external centers of power. Addressing these structural conditions requires a holistic approach that combines technological investment, regional legal harmonization, epistemic decolonization and geostrategic competition, in order to strengthen Africa's digital sovereignty and ensure its equitable participation in the global digital economy.

Towards Deconstructing Digital Colonialism: Strategies of Resistance

This section highlights key initiatives and measures undertaken by African countries to strengthen digital sovereignty and examines critical strategies that facilitate the achievement of this goal. As part of the broader movement toward digital sovereignty in Africa, a number of countries have recognized the importance of taking control of their digital future. Here are a few notable examples:

- **Nigeria: The Digital Economy Strategy:** Nigeria has made significant progress by launching a national digital economy strategy. This initiative aims to diversify the economy, by harnessing digital technologies, focusing on developing digital skills, boosting e-commerce, and creating a supportive regulatory environment (Timcke 2024, 4).
- **Kenya: The Huduma Digital Platform:** Kenya has established a new standard with its “Huduma” platform, which helps reduce bureaucratic barriers, increases the efficiency of public services, and gives citizens easier access to government services (Kwet 2019, 4).
- **South Africa: Protection of Personal Information Act (POPIA):** South Africa adopted the POPIA law to protect citizens' privacy and ensure that personal data is handled securely and responsibly (Folorunso et al. 2024, 129).
- **Rwanda: Promoting Innovation and Technology:** Rwanda has shown strong commitment to building a digital future by launching projects like the Kigali Innovation City and the Rwanda Coding Academy. These initiatives are helping create a skilled tech workforce and driving the growth of the digital economy (Salami 2024, 5).
- **The African Union:** The African Union has launched its Digital Transformation Strategy (2020-2030), aiming to connect governments, businesses, and individuals across the continent by 2030. The strategy emphasizes the need for high-level political commitment, coordinated policies, increased investment, and proper resource allocation. It also highlights the importance of harmonizing legal and regulatory frameworks to build a unified digital market. The African Union Convention on Cybersecurity and Personal Data Protection (AUDPC) (Bouke et al. 2023, 13) is one step in that direction. Additionally, the strategy promotes the digital economy in alignment with the African Continental Free Trade Area (AfCFTA) (Venske 2024).

These African initiatives reflect a growing effort to transform the digital future of the continent. However, despite these promising steps, many African countries still lack the necessary digital policies. Even where strategies do exist, they are often poorly implemented or insufficient to achieve true digital sovereignty. As a result, the threat of digital colonialism remains a real challenge. This calls for resistance strategies that tackle the issue from multiple dimensions, which will be explored in the next section.

Resistance Strategies and Digital Liberation

Drawing on postcolonial theory, this section moves beyond merely identifying the challenges of digital colonization to propose meaningful, context-specific strategies for resistance. Here are some of the key strategies that African countries can adopt to resist digital neocolonialism:

- **Protecting Digital Sovereignty :** African countries must protect their digital sovereignty to prevent unjustified foreign influence. This includes enacting policies and regulations that protect sensitive data, ensure that digital infrastructure projects align with national interests, and promote data localization. (Bouke et al. 2023, 13) To achieve this, it's crucial to harmonize data governance frameworks at both the regional and continental levels to promote cooperation and consistency. For example, data protection laws in Nigeria and South Africa serve as strong models of how countries can protect their digital sovereignty, by enforcing strict data privacy rules and requiring companies to store data locally (Dahiya 2023).
- **Promoting Local Technology and Innovation:** Fostering homegrown innovation is essential for achieving African digital independence. As mentioned earlier, heavy reliance on foreign technology can limit local creativity and entrepreneurship. (Fritzsche and Spoiala 2022) To overcome this, African countries should prioritize the development of local tech innovation and support African startups. A good example is Rwanda's "Made in Rwanda" initiative, which involves active government support for the local production of tech products, such as smartphones. This effort reduces dependence on foreign imports, strengthens technological self-sufficiency, and boosts exports (Salami 2024).
- **Bridging the Digital Divide:** To address the digital divide that excessively affects marginalized communities, African governments should increase internet access and promote digital literacy across the continent. This is not only an economic necessity but also a critical step toward social justice (Salami 2024). For instance, Kenya's National Broadband Strategy intends to provide reasonably priced internet access to underprivileged areas, thereby narrowing the digital gap and fostering digital inclusion. Ultimately, bridging this divide is vital to ensuring that digital inclusion becomes a genuine driver of social inclusion and equitable development (Dahiya 2023).
- **Strengthening Local Digital Infrastructure:** Investing in local digital infrastructure-such as data centers, undersea internet cables, and telecommunications networks-is critical for reducing reliance on foreign-owned services. Additionally, partnerships with external partners should be transparent,

fair, and aligned with national interests (Atintande et al. 2020). The decision Ethiopia to liberalize its telecom sector, while maintaining a significant stake in Ethio Telecom, is an adequate strategic. It attracts foreign investment while keeping national interests at the forefront and improving domestic infrastructure. (Salami 2024).

- **Advancing Education and Knowledge Empowerment:** For long-term digital resilience, African countries must invest in education and scientific research. This includes developing school curricula focused on fostering digital competencies, providing support to research institutions, and promoting a culture of innovation and problem-solving skills.

Ultimately, digital resistance in Africa is not merely about policy reform but about reclaiming agency in knowledge production, data governance, and technological design - the core domains through which digital colonialism reproduces itself (Menon 2023).

Furthermore, many scholars argue that liberation from digital hegemony does not entail rejecting technology but rather reclaiming and re-appropriating it epistemically and culturally. In this sense, digital liberation is not achieved through isolation from global technologies but through their contextualization within African knowledge systems and cultural frameworks. This approach transforms resistance into a creative process of technological ownership and self-definition, aligning digital innovation with local values and social realities. (Birhane 2023, 248-249; Choi 2026)

Taken together, these strategies demonstrate that Africa's digital future hinges on reclaiming both technological and epistemic autonomy. In this context, digital sovereignty depends not only on infrastructural investment but also on decolonizing the very frameworks through which technology and knowledge are produced. If strengthened by coherent regional governance and grounded in local epistemologies, the continent's ongoing initiatives can transform digital resistance into a long-term architecture of empowerment and self-determination (Botha, Kornprobst and Wielenga 2026).

Conclusion and discussion

An analysis of digital colonialism in Africa through a postcolonial lens reveals that technology is far from neutral; it has become a powerful instrument for reproducing economic, cultural, and political domination over the continent. Africa now stands at a decisive juncture. While foreign investments in digital infrastructure and transformation are essential for modernization, they simultaneously pose profound risks- manifesting through infrastructural exploitation, data extraction, limited oversight over information flows, surveillance, and other forms of digital control.

These challenges are exacerbated by structural vulnerabilities such as weak local infrastructures, fragmented or absent legal frameworks, a widening digital divide, and pervasive digital illiteracy. All of these conditions entrench external domination and reinforce technological dependency. Hence, deconstructing digital colonialism requires intentional, context-specific strategies aimed at strengthening digital sovereignty and fostering technological self-determination-ensuring that Africa can define and govern its digital destiny according to its own values and priorities.

Confronting digital colonialism effectively demands a renewed focus on national autonomy and data sovereignty while nurturing local technological ecosystems. This involves promoting innovation within the continent, enhancing digital literacy, empowering communities, and enacting robust data protection laws. In addition, stronger collaboration between African governments and indigenous tech enterprises is vital to developing infrastructure aligned with the continent's genuine needs.

Encouraging the adoption of open-source technologies and fostering intra-African cooperation can further reduce reliance on dominant global tech firms. Importantly, digital liberation does not imply rejecting technology, but rather reclaiming and re-appropriating it epistemically and culturally -transforming it into a vehicle for empowerment instead of dependency.

Ultimately, Africa's digital future must rest upon indigenous foundations that prioritize sovereignty, inclusion, and self-determination. Only through such an approach can the continent pursue a path toward equitable and sustainable development -one that liberates it from the structural constraints of Western technocapitalism and affirms its rightful agency in shaping the digital age.

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Ethics Statement

The authors affirm that this research was conducted in accordance with the Journal's Research Ethics and Integrity Statement and that all ethical requirements applicable to the study have been fulfilled.

Conflict of Interest Statement

The authors declare no conflict of interest.

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