

CIVIL SZEMLE

I N T E R N A T I O N A L

KÜLÖNSZÁM – 2023 – SPECIAL ISSUE IV.

CHANGING THE PATH.

CRISIS, SOCIETY AND POLITICS IN THE CONTEMPORARY WORLD

ANDREI TARANU, ISTVÁN PÉTER NÉMETH, EUGEN GABOR,
ORSOLYA FALUS, ZOLTÁN ZAKOTA (Eds.)



Vlad Bujdei-Tebeică NEOLIBERALISM AND THE RED PILL: HOW ANDREW TATE USED POPULIST DISCOURSE TO SPREAD ONLINE MISOGYNY ■■■ Mădălina Constantin #JESUISCHARLIE MOVEMENT AND POLITICAL CORRECTNESS IN FRENCH MULTICULTURAL SOCIETY ■■ Radu-Alexandru Cucută LIMINALITY AND FASHIONABLE CONCEPTS. THE USE OF INTERNATIONAL RELATIONS THEORIES AND CONCEPTS IN ROMANIA'S STRATEGIES ■■ Paul Dobrescu-Flavia Durach CLASHING VISIONS FOR DEVELOPMENT ■■ Eugen Gabor THE CONTEMPORARY EUROPEAN SOCIAL DEMOCRACY: DOWNFALL AND RESILIENCE AS REFLECTED BY THE ROMANIAN (PSD) AND DUTCH (PvdA) CENTER-LEFT ■■■ Iulia Huiu „AS LONG AS IT TAKES.” AN ANALYSIS OF THE DISCOURSE AND POLICIES OF THE BIDEN ADMINISTRATION DURING THE FIRST YEAR OF WAR IN UKRAINE ■■ Vanya Kashukeeva-Nusheva THE ELECTORAL PROCESS IN BULGARIA: CURRENT PROBLEMS AND NECESSARY CHANGES IN THE LIGHT OF INTERNATIONAL STANDARDS FOR FAIR AND DEMOCRATIC ELECTIONS ■■ Daniela La Foresta-Vittorio Amato DIGITAL TERRITORIES. CONFLICTS, ACTORS AND POWER IN THE RELATIONAL SPACE OF THE METAVERSE ■■ Luis Loia POLITICAL IDEOLOGIES AND SOCIAL IMAGINARIES ■■ Gianluca Luise CAPACITY TRAINING: TRAINING AND CAPACITY IN THE EVOLUTION OF PUBLIC ADMINISTRATION IN ITALY ■■ Diana Elena Neaga (UN)COMMITTED TO GENDER EQUALITY — AN OVERVIEW OF STRATEGIC GOVERNMENTAL PLANNING IN ROMANIA ■■ Valentin-Quintus Nicolescu INTELLECTUAL ORIGINS OF PUTINISM AS RUSSIA'S STATE IDEOLOGY ■■ Brîndușa Palade COMING TO TERMS WITH THE COLONIAL LEGACY? IMPERIAL MORES AND ENDURING CLASSISM IN THE UNITED KINGDOM ■■ Mykola Polovyi THREATS OF WARTIME RESTRICTIONS TO POST-WAR DEMOCRACY AND CIVIL SOCIETY IN UKRAINE ■■ Adrian Popovici APOCALYPTIC NARRATIVES AS AN INTEGRAL PART OF POLITICAL IMAGINATION — AN ANALYSIS OF ANCIENT BIBLICAL MYTHS AND THEIR EVOLUTION ■■ Ștefăniță Puiu MIGRATION BETWEEN LATIN AMERICA AND THE UNITED STATES OF AMERICA IN 2015–2018 ■■ Radu Sebastian Ungureanu WARS, STATES, AND LIBERAL VALUES: RESHAPING THE INTERNATIONAL ORDER IN A GLOBAL WORLD ■■ Anca Vasilache THE „FREE AND OPEN INDO-PACIFIC” STRATEGIC CONCEPT: A TRANSCENDING AMERICAN FOREIGN POLICY DIMENSION DURING DONALD TRUMP ADMINISTRATION (2017–2021) ■■ Milena Hristova Yorgova THE WELFARE STATE THROUGH THE LENS OF THE SOCIAL INVESTMENT PERSPECTIVE: TRANSFORMATIONS AND CHALLENGES



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NEOLIBERALISM AND THE RED PILL:

HOW ANDREW TATE USED POPULIST DISCOURSE TO SPREAD ONLINE MISOGYNY

Vlad Bujdei-Țebeică

Introduction

■ Online misogyny, the red pill movement and incel culture have been extensively studied over the past decade (Moloney 2018; Ging 2017; Byerly 2020; Van Valkenburgh 2018). Despite this, none of these concepts gained anywhere near the same attention as Andrew Tate in 2022. While relevant in and of themselves, they were relegated to specific online communities such as r/TheRedPill, some sub-forums on the 4/chan social media platform, theredpillroom.blogspot.ie, angryharry.com and manosphere.com (Ging 2017). On the other hand, at his peak, in July–August 2022, Andrew Tate was being searched for 25 times more frequently on search engines than all of these concepts combined¹. This article examines how, using a combination of neoliberal and populist ideology, Andrew Tate managed to capacitate an already frustrated online community of young men to create and spread his content online voluntarily. In this case, these communities act within the wider virtual civil society of the internet and serve as an example of how civil society can also be a space for the proliferation of harmful and divisive ideologies, in this instance, misogyny, anti-feminism and the commodification of women.

This article examines the construction of Tate's discourse and the method of discourse dissemination through online social media platforms to understand its popularity. Building on extensive References about the red pill movement, internet "manosphere," PUA culture, incel culture, and related sub-cultures, the study recontextualises them as populist discourse, offering a Manichean view of society where women supplant men's power. The first section, "Red-Pill Populism," explores

the theoretical foundations of populism and online misogyny, highlighting their shared exploitation of social tensions, disempowerment, and nostalgia for an idealised past.

This simplification of complex issues into binary oppositions attracts those seeking clear answers and scapegoats for their grievances.

The second step is understanding that online misogynistic sub-cultures operate under a neoliberal ideological framework in which women are subject to commodity fetishisation (Van Valkenburgh 2018). In the second section, “Neoliberal Misogyny,” the study investigates the intersection of neoliberalism and misogyny in shaping gender dynamics within the red pill community. The analysis explores the ways in which neoliberal subjectivation, with its focus on entrepreneurship, expertise, and expectations, reinforces and perpetuates hegemonic masculinity, marginalising alternative masculinities and further entrenching gender stereotypes and power imbalances.

Lastly, “Discourse and Method Analysis” examines the content of Andrew Tate’s discourse throughout 2022, focusing on his social media output and other online materials. This section provides insights into the key themes and messages that characterise Tate’s ideology and the methods and techniques he employs to promote his worldview and garner a substantial following within the incel and red-pill communities.

Methodology and article structure

This study seeks to create a framework for understanding the ideology behind Andrew Tate’s discourse. It identifies the main channels of discursive output and defines the critical components of Tate’s ideological framing of the world. The primary approach to analysing the data is discourse analysis, focusing on 39 hours of audio-visual material of Andrew Tate (occasionally accompanied by his brother, Tristan Tate, who also shares his worldview), as well as a book which also reflects Tate’s perspective on life and is aptly titled “The Tate Bible”. The audio-visual material is split into three distinct formats: podcasts, interviews and online courses. These are long-format videos, ranging from half an hour to two and a half hours. The podcast is titled „Emergency Meeting” and features Andrew Tate and his brother Tristan. In the interviews, Andrew Tate is a guest on various other online shows. This allows him to expand his reach and audience beyond his own, and it is the principal vehicle that has allowed him to create viral soundbites which have been propagated throughout the internet. Last but not least, this study looks at the audio-visual content of Andrew Tate’s so-called “Hustlers University”, an online course in which he promises to teach would-be students the secrets to his lifestyle and how they can replicate his principles in order to achieve financial success. These three audio-visual formats were subjected to qualitative media analysis (Rogers, 2005), an inductive method where patterns, themes, and categories

emerge from the data through a systematic and iterative process of observation, interpretation, and comparison.

Red-Pill Populism

Populism has always been charged with various meanings and interpretations, making it difficult to provide a single, universally accepted definition (Betz 1998; Mudde 2004; Abi-Hassan 2017). Despite this complexity, populism can generally be understood as a political approach or ideology that emphasises the distinction between “the people” and “the elite,” often proposing that the will of the people should be the primary driver of political decision-making.

Perhaps the most cited definition of the concept belongs to Mudde, who argues that populism is a Manichean ideology in which the corrupt elite and the pure people are at fundamental odds and that politics must represent the will of the people (Mudde 2004). However, Jan-Werner Müller goes beyond this definition, arguing that populists do not simply claim to represent the people, but they, in fact, claim monopoly to that representation (Müller 2016). This, in essence, translates to a fundamentally anti-pluralistic dimension that does not allow for other types of representation in society, except for the interests of ‘the people’.

Online misogyny, on the other hand, often revolves around the dichotomy between “real men” (i.e., straight, heteronormative men) and queer individuals, as well as women. This dichotomy frequently establishes a hierarchy that positions the “real men” as dominant and superior while denigrating and marginalising the others. Similar to populism, the „red-pill” relies on the construction of a common enemy, or “other”, to validate its ideologies and create a sense of belonging among its adherents.

The parallel between the two can be seen in the way both populism and online misogyny exploit social tensions, feelings of disempowerment or marginalisation, and the desire for a return to an idealised past or status quo. By simplifying complex social, economic, and cultural issues into binary oppositions, both phenomena can attract individuals seeking clear answers and scapegoats for their grievances.

Moreover, social media has significantly contributed to the spread of populist and misogynistic ideas by providing platforms for dissemination and fostering echo chambers. Feminist media studies depict online misogyny as attempts to dominate and control women. However, a sociological perspective links these acts to gender stratification and masculinities, positioning them as part of a broader system perpetuating hegemonic power structures. In this sense, online misogyny adheres to heterosexist, cisnormative frameworks governing social interactions, devaluing deviations from binary constructs of sex, gender, and compulsory heterosexuality. (Moloney, 2018).

Neoliberal misogyny

Neoliberalism often applies market-based logic to various aspects of life, including social relationships. In the context of the red pill movement, this manifests as viewing dating and relationships through the lens of economic transactions, with men and women engaging in a marketplace of potential partners. This perspective reinforces commodification and objectification and perpetuates gender stereotypes and power imbalances.

We can see the effects of neoliberalism within the red-pill community by focusing on its modes of subjectivation, which involve the ways in which postwar governance has shaped individual identities through various discourses, strategies, and techniques. Three dimensions of neoliberal subjectivation are relevant to this study: entrepreneurship, expertise, and expectations (Bratich–Weiser, 2019). Entrepreneurship emphasises self-driven, individualised, and self-managed approaches to life, while expertise denotes reliance on self-help discourses, training mechanisms, and pedagogic figures to guide one’s actions. Additionally, confidence emerges as a crucial value and goal at the intersection of these two dimensions in the process of neoliberal subjectivation (Gill–Orgad, 2017).

The third dimension, expectations, pertains to the gendered aspects of confidence-building, specifically the masculine expectations associated with social reproduction (including biological, care work, emotional support, and comfort) that underpin this individualism. In this context, neoliberal “individualism” is not solely about individual autonomy but also relies on interdependence – managing resources (including utilising others as instruments) and trusting experts as guides. This study argues that neoliberalism shapes individual identities in a way that fosters self-reliance and confidence while simultaneously relying on gendered expectations and expert guidance.

The third wave of post-World War II neoliberal cynicism is characterised by a pervasive pessimism regarding the possibility of an alternative global order. The emphasis on limited resources and the notion of the “selfish gene” serves as a stark reminder of the existential significance of human subjectivity and life experience, which is reduced to fulfilling desires in the present moment (Amadae 2016). Additionally, neoliberalism reinforces individualism and competition, aligning with traditionally masculine traits such as self-reliance and competitiveness. Consequently, this environment rewards and perpetuates hegemonic masculinity, as men adhering to these norms are more likely to succeed in a neoliberal society, thereby marginalising those who defy traditional gender roles, including women and non-conforming men.

Discourse and method analysis

Part of the success Tate's discourse has had online is due to pre-existing conditions already embedded within both online and offline spaces. As Lise Gotell and Emily Dutton (2016) analysed back in 2016, sexual violence towards women was emerging as a new focus of the men's rights movement. This sought to undermine the criticism that feminism was bringing to rape culture and paint it as simply moral panic. Even back in 2013, Canadian university campuses formed groups explicitly targeting young men that would criticise rape culture figures (Gotell–Dutton 2016). For over a decade, men's rights movements have stoked young men's anxieties towards consent standards and shifting gender and sexual norms.

Andrew Tate is a British-American businessman, former kickboxer, and social media personality who emerged in 2022 as a prominent figurehead of the red pill movement. Tate's trajectory towards prominence started with his participation in the UK reality television series "Big Brother" in 2016, subsequently augmenting his public visibility and fostering the growth of his online persona. Seizing the opportunity presented by his increased notoriety, Tate disseminated content promulgating his contentious perspectives on masculinity, interpersonal relationships, and self-enhancement. His ideologies and way of life struck a chord within the incel and red-pill communities, facilitating the development of a substantial following. Advocating red pill philosophy, which posits that society is covertly female-dominated and endeavours to "enlighten" men to this purported reality, Tate has evolved into an influential figure within the movement. His entrepreneurial pursuits, self-improvement discourses, and his unabashed promotion of traditional-conservative ideals of masculinity have solidified his standing as a preeminent authority within the red pill milieu.

Tate's following primarily consists of young men actively participating in online communities promoting misogyny, such as the manosphere and the incel community. The manosphere is an umbrella term for a collection of websites, forums, and social media spaces devoted to discussing men's issues, often from a perspective that challenges or criticises feminist viewpoints. The incel community, or "involuntary celibates," represents a subset of the manosphere, primarily composed of men who express frustration and resentment over their perceived inability to form romantic or sexual relationships with women.

In terms of how exactly Andrew Tate grew his online social media presence, he did so through the affiliate marketing program of his online academy, Hustler's University. The program enabled his followers to earn commissions for signing up new members and encouraged them to post videos of him to maximise referrals. This strategy led to thousands of videos being posted on social media, generating numerous referrals and propelling Tate to viral fame. In essence, Tate created a Ponzi scheme by making his followers believe that they were pursuing their own financial freedom while, at the same time, they were contributing to his viralisation throughout social media.

An Observer investigation revealed that followers were explicitly encouraged to create “arguments” and “war” by posting deliberately controversial clips that would attract high engagement and views, generating more Hustler’s University signups (Shanti 2022). On TikTok, content tagged with Tate’s name has been watched more than 12 billion times as the platform’s algorithm pushed his videos to young users.

The discourse analysis of the content that Andrew Tate produced throughout the year 2022 reveals that his message can be broken down into two components: the first refers to a traditional perspective on the social role of men, while the second espouses the ideals of self-made hustle culture. These two categories can be labelled “social” and “economic”. The

Using the previously defined dimensions of neoliberal subjectivation we can conclude that Tate portrays himself as a figure of authority or expert by emphasising his accomplishments, self-confidence, relationship expertise, rejection of conventional wisdom, superiority over critics, and willingness to share his knowledge with others. Regarding entrepreneurship, Tate demonstrates self-driven, individualised, and self-managed approaches to life by focusing on his financial success and luxurious lifestyle. Furthermore, he emphasises his rise from humble beginnings, rejecting conventional norms, formal education, and traditional employment. Through this, Tate embodies the entrepreneurial spirit and projects confidence as a critical aspect of his persona.

Regarding expertise, Tate relies heavily on self-help discourses, sharing unique insights and experiences to guide others. He positions himself as a pedagogic figure with valuable knowledge, particularly in romantic relationships and personal development. His confidence in his abilities reinforces his image as an expert, with the promise of guiding others to similar success. Tate developed the concept of the so-called ‘Hustler’s University’ as part of his pedagogic persona. Most of Andrew Tate’s discourse is dedicated to exploring diverse approaches to generating income. Tate consistently emphasises using illicit means to accumulate wealth during these discussions, specifically by defrauding other individuals. In one example, he explains that all you need to do to start a business is to “make a website, put some pictures on there, pretend you’ve got a whole bunch of stuff you ain’t got, and start getting money in.”

Lastly, expectations encompass the gendered aspects of confidence-building and the masculine expectations associated with social reproduction. Tate’s portrayal of his experiences and expertise embraces these masculine expectations, emphasising his role in managing resources and utilising others as instruments for success. Neoliberal individualism in this context also highlights interdependence, with Tate showcasing his ability to trust and rely on experts as guides.

Conclusion

In conclusion, this study has established a comprehensive framework for understanding the ideology behind Andrew Tate's discourse, focusing on how he disseminates his views on masculinity, relationships, and self-improvement. By employing discourse analysis, the study has dissected the key components of Tate's ideological framing of the world and highlighted how his message resonates with the red pill community. The research has demonstrated that Tate's message comprises two main components: traditional perspectives on men's social roles and promoting self-made hustle culture. Moreover, the study has shown that the dimensions of neoliberal subjectivation-entrepreneurship, expertise, and expectations-play a critical role in shaping Tate's persona and appeal to his audience.

Furthermore, the analysis has revealed the connections between Tate's discourse and the broader socio-political context of neoliberalism, populism, and online misogyny. Both populism and online misogyny exploit social tensions and simplify complex issues into binary oppositions, attracting individuals who seek clear answers and scapegoats for their grievances. Additionally, neoliberalism's influence on individual identities fosters self-reliance and confidence while simultaneously perpetuating gendered expectations and expert guidance. By examining the interplay between these factors, the study has shed light on the strategies and methods employed by Tate to create a sense of belonging among his followers and to maintain his position as an influential figure within the red pill movement.

The rise and spread of such ideas highlight the role civil society can play in shaping public discourse, attitudes, and behaviors, both positively and negatively. It also underlines the responsibility of participants and platform providers in moderating content and ensuring that civil society spaces, including those online, promote respect, inclusivity, and social cohesion.

Tate's monetization of these ideologies and his subsequent legal investigation demonstrate the interplay between civil society, economic forces, and state regulation. Civil society's ability to act as a check and balance on these forces is crucial for a healthy, functioning democracy. The reactions and counter-movements from feminist groups, the public, and social media platforms demonstrate another key role of civil society: providing a platform for activism, debate, and response to harmful ideas or actions. As such, the topic illuminates the ongoing struggle within civil society to negotiate the boundaries of acceptable discourse and behavior.

Further potential avenues of research include investigating the role of social media platforms and their algorithms in disseminating and amplifying red pill ideology. This is crucial to understanding the dynamics of echo chambers and filter bubbles, as well as the potential implications for online discourse and public opinion. Alongside this, identifying and evaluating existing counter-narratives and interventions aimed at challenging or mitigating the impact of red pill ideologies and online misogyny will help develop more effective strategies for addressing these issues and fostering more inclusive and equitable online spaces.

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Notes

¹ According to Google Trends, searched March 20th 2023, link: <https://trends.google.com/trends/explore?q=andrew%20tate,red%20pill,manosphere,misogyny&hl=en-GB>

² Citation taken from one of Andrew's online courses.



#JESUISCHARLIE MOVEMENT AND POLITICAL CORRECTNESS IN FRENCH MULTICULTURAL SOCIETY

Mădălina Constantin

Introduction

■ This article is a part of a broader research regarding how the Political Correctness ideology is assimilated in multicultural societies in Europe. The current paper addresses the #JeSuisCharlie movement from a perspective of the integration of a minority (the Muslim ethnic group) into a multicultural and liberal country (France). The analysis is done focusing on the role of the fundamental human right of freedom of speech as a value of the anti-political correctness trends. The questions investigated are: how can the integration of Islamic religious communities can take place in the French secular culture and not affect the freedom of speech? What political measures could be taken for the success of this integration?

Political correctness

Definition of the concept

Political correctness is a controversial concept and phenomenon in our Western democracies. It has a great impact on our everyday life, be it in the academic field, in art, in the work environment, in everyday communication, on social media. The definition of the concept often varies depending upon the attitude the author has toward the phenomenon: either for, or against it. As a challenging concept that has evolved in more than half a century of existence, researchers have

established that a thorough and rigorous definition agreed by both parties is not yet available: "*ce qui réunit les sources qui abordent le Political Correctness comme phénomène, c'est la constatation qu'il échappe à toute définition rigoureuse et universelle*" (Saltykov 2021).

The dictionary definitions shed some light on the main elements of political correctness, i.e. approval or re-jection of behaviour and language that might be discriminating or offensive for a member of a minority, but they do not cover all the complex aspects of the concept (for example, the positive discrimination):

- "Adhering to a typically orthodoxy on issues involving especially race, gender, sexual affinity or ecology" (*Random House Webster's College Dictionary*).
- "PC (political correctness) is conformity to a body of liberal or radical opinion on social matters, characterized by the advocacy of approved views and the re-jection of language and behaviour considered discriminatory or offensive" (*Oxford Dictionary of the New Words*).
- *Political correctness* (adjectivally: politically correct; commonly abbreviated PC) is a term used to de-scribe language, policies, or measures that are intended to avoid offense or disadvantage to members of particular groups in society.

Having its origin in Marxism and in Marcuse's thinking about the role of language in reinforcing social hierarchies, enhanced by the feminist movements from the '60 and '70, the concept of political correctness was used by left-wing and academic circles in the US in the '70 and '80 to refer to promoting inclusive language and challenge discrimination practices. Internet and Social Media, together with contemporary so-cial justice movements like #BLM, #MeToo and LGBTQ+ spread the ideas of the importance of non-discriminative, inclusive language and behavior all over the world. From the perspective of its supporters, "political correctness aims at preventing social discrimination by curtailing offensive speech and behaviour towards underprivileged groups of individuals" (Dzenis–Nobre Faria, 2019).

In practice, political correctness lead sometimes to a clash between the fundamental right of any democracy – freedom of speech, and the right of a minority to benefit from equality and non-discrimination in a society. As the line where the freedom of speech should be suspended in favour of the rights of the minorities has proved itself, in practice, to be very volatile, and examples of exaggerations have led to a dangerous "cancel culture", for example, there is serious questioning regarding some of the effects of political correctness in our societies. Therefore, in the camp of those who are against it, the definition shifts towards the negative: "political correctness seems gradually to be turning into a dirty word, referred to as a way of the elite to censure almost anything, thereby robbing society from its spontaneity and frankness in practically every channel of expression." (Marques, 2009) For the purpose of this article, we will use as a tool for our research the "neutral" definition given by Dzenis–Nobre Faria, "political correctness aims at preventing social discrimination by curtailing offensive speech and behaviour towards under privileged groups of individuals".

Values and dangers of Political Correctness

The core value of this ideology – “a concrete social phenomenon with broad recognition” (Dzenis–Nobre Faria 2019) – is equality, which places it in the sphere of left-wing politics. The two social principles of political correctness are negative linguistic (forms of language)/hate speech and positive pragmatic (norms of social action: positive discrimination). The negative aspects of political correctness, highlighted by the researchers in the field (Weigel 2016) (Hollander 1994), are:

- Censorship of free speech and “un assaut contre la liberté d’expression et de pensée, et comme la répression d’un débat public libre, l’imposition de bornes artificielles” (Saltykov 2021).
- Imposition of egalitarianism, single-mindedness, wooden language, propaganda.
- Self-censorship of speakers (public persons, politicians become schizoid: they say one thing, think an-other).
- Reverse discrimination, reversal of the roles of dominator and dominant.
- Falling standards of excellence in universities.
- Victimisation of minorities resulting in a shrinking of their lowly positions.

The values of political incorrectness are opposed to the negative effects mentioned above and are part of the list of traditional values: freedom, truth or honesty, objectivity; the fight against the system.

The corpus of studied documents

The bibliography on political correctness is vast and covers several decades. Given the topicality of political correctness concerns, the latest sources cannot be ignored. Given the plethora of English/French documentary sources available on political correctness, a preliminary source selection strategy is necessary. I chose to study cutting-edge academic articles (2020–2022), recent and important press articles (The Economist, The New York Times, etc.), a few references works from the 1990s and the last decades, plus documents for the conceptual definition of the phenomenon. Among the indisputable, in 1987, Allan Bloom published a critique of political correctness in the book *The Closing of the American Mind*, which became a bestseller and sold more than half a million copies. The political correctness mania first reached its peak in 1990–1991. Two high-profile articles mark this era: “The Rising Hegemony of the Politically Correct” in The New York Times by Richard Bernstein and “The Storm over the University” in The New York Review of Books by John Searle. The articles reignited and sustained the controversy surrounding political correctness, along with the equally important article entitled “The Thought Police” in Newsweek. Dinesh D. Souza published an editorial on the subject in the Atlantic Monthly in March 1991, which would be followed by a major study published in 1991 entitled *Illiberal Education: The Politics of Race and Sex on Campus*.

In terms of the social movements studied, and also for the #JeSuisCharlie movement, the official websites and social media were used as main sources.

Political correctness and Social Protest Movements

Political correctness is an ideology based on the fight against discrimination. As a social factor, political correctness and its opponents produced in 21st century a very important cultural polarization in Western countries. Majorities and minorities are divided by the attitude for or against this ideology, and one of the manifestations of this polarization are some worldwide protest movements: #BLM, #JeSuis-Charlie, #Me-Too, #Balancetonporc, Les vestes jaunes, Pro Choice, etc.

Each of the above-mentioned social movements was born out of a stringent problem related to discrimination in the society in question, and is therefore closely linked to the phenomenon of political correctness. Despite initially being endemic phenomena, these movements have become global, not only because of social networks and the speed of communication in the 21st century, but also because the problems they seek to address have a universal value. Even if the problems are universal, national cultures do not metabolise these movements in the same way; the impact of movements that are exported spontaneously is by no means the same in three different countries. The factors that have contributed to the success of these movements born out of different types of discrimination have been the very high emotional impact of the events that triggered the protests, the speed of communication and its globalisation, the education enjoyed by the latest generations, not least the degree of democracy of the country in which they emerged. Country-specific cultural factors play a specific role.

#JeSuisCharlie Movement

#JeSuisCharlie is a world-wide movement that started as a wave of solidarity with the magazine of the same name and its staff following the 2015 terrorist attack on the offices of the publication. The movement is part of an anti-political correctness movement, campaigning for freedom of expression and against the terrorist violence to which members of the editorial staff of the French newspaper of the same name have been sub-jected.

The perpetrators of the attacks against the satirical magazine *Charlie Hebdo* from Paris that led to the death of 12 people were two brothers, Saïd and Chérif Kouachi, French citizens of North African Descent. The brothers were born in France to Algerian immigrant parents. The third suspect, Amedy Coulibaly, who carried out a related shooting at a kosher supermarket in Paris on January 9, was also a French citizen of Malian descent.

In the wake of the 7 January 2015 terrorist attack on the daily *Charlie Hebdo* in Paris, within an hour of the attack, journalist Joachim Roncin of *Stylist* magazine launches the Twitter slogan #JeSuisCharlie. On 8 January, Twitter France announces that the slogan has been posted more than 3.4 million times worldwide. More than 4 million people demonstrated in the first days after the jihadist attacks of 7.8 and 9 January 2015, supported by hundreds of thousands more worldwide. But the unprecedented Parisian mobilisation (over 2 million demonstrators) is no guarantee that the whole of French society shares the same view of freedom of expression in the name of which the *Charlie Hebdo* journalists died. The #JeSuisCharlie phenomenon gave birth to the #JeNeSuisPasCharlie phenomenon and divided the French public debate on the issues of freedom of expression, secularism, race, national identity, and Islam (Onishi–Méheut 2020).

In October 2020, the teacher Samuel Paty, in a lesson on freedom of expression in a school near Paris, proposed a debate to his pupils on the *dilemma of being or not being Charlie*. During the same lesson, he showed pupils two drawings of Mohammed from *Charlie Hebdo*. A few days later he was beheaded by an Islamist extremist, incited by a parent's outrage on social media.

The terrorist attack against *Charlie Hebdo* is different from the other terrorist attacks that took place in France during the following years. Representatives (or terrorists that *considered themselves to be* representatives of the French Islamic community) responded by violence to what they considered as an offense brought to their traditional values, and that can be described as a *politically incorrect* act. The terrorist attack was "une attaque ciblée" against the *Charlie Hebdo* staff, compared to other terrorist attacks where the victims were anonymous, bearing the "collective guilt" of the whole society against the values of the ethnic minority. From the point of view of the Muslim community, the respective *Charlie Hebdo* drawings of Mohammed were a blasphemy, a very strong offense. From the magazine's point of view, the drawings were the expression of the right to freedom of speech, guaranteed by the Republican liberal *tradition* and by law. This right to blasphemy, as Kymlicka put it, should not only be the right of an individual in a secular society, but also the internal right of any member of an ethnic minority, inside his own religious community. The question is how could the Muslim ethnic minority have reacted to this blasphemous offensive act? By using their right of freedom of speech in mass media, and the incident would have remained in the cultural sphere of a public debate. By using the power of justice and suing the publication for defamation or offensive speech, i.e. the Article 24 of the French press law (Loi sur la liberté de la presse), adopted in 1881 and modified on January 27, 2017: "Art. 24. Ceux qui, par l'un des moyens énoncés à l'article 23, auront provoqué à la discrimination, à la haine ou à la violence à l'égard d'une personne ou d'un groupe de personnes à raison de leur origine ou de leur appartenance ou de leur non-appartenance à une ethnie, une nation, une race ou une religion déterminée, seront punis d'un an d'emprisonnement et de 45 000 euros d'amende ou de l'une de ces deux peines seulement."

The violent response to this non-political correct act shows another very dangerous aspect of the identification of an ethnic minority that receives support (before or after the attacks) from foreign terrorist organisations: Al-Qaeda in the Arabian Peninsula (AQAP) claimed responsibility for the attack on 9 January in a press release, but there were reports of support also from other Salafist jihadist organisations. Among them the Islamic State, Al-Qaeda in the Islamic Maghreb (AQIM), Al-Mourabitoune, Jamaat al-Ahrar, a branch of the Tehrik-e-Taliban Pakistan, Boko Haram, and in Somalia, the Shehab movement. The perpetrators of the attack were described as “heroes” and “knights of truth”.

Also, French Muslim institutions are often connected to specific ethnic groups and maintain relationships with foreign governments or institutions. Therefore, with the uprising tension between the Muslim community in France and French society in general, there is a serious threat: *“The likelihood of violence is dramatically increased when a minority is seen (or sees itself) as belonging to an adjacent “mother country” which pro-claims itself as the legitimate protector of the minority. The government of Hungary has declared itself the protector of ethnic Hungarians in Slovakia and Romania; leaders in Russia and Serbia have made similar declarations about ethnic Russians in the Baltics and ethnic Serbs in Bosnia and Croatia. Protecting the rights of a national minority under these circumstances can become a pretext for territorial aggression by the self-proclaimed protector state. This shows the necessity of developing truly international mechanism for protecting national minorities that do not rely on the destabilizing threat of intervention by kin states.”* (Kymlicka 1995: 58)

The French president Emmanuel Macron, during the Islam Forum of France in February 2023, draws the attention of the Muslim ethnic minority in France upon the negative consequences for the members of the latter of foreign powers and foreign religious movements: *“de lutte contre toutes les propagandes, les discours de manipulation et au-delà de ce qui est fait dans la structure, sur notre sol de l’Islam en France, eh bien l’utilisation des réseaux sociaux, de certains organes par des puissances extérieures ou des mouvements religieux qui ont une conséquence sur notre sol et qui viennent en quelque sorte bousculer le chemin de concorde que nous sommes en train collectivement, de mener.”* (Macron, Vie Publique 2023) The President invited the Muslim community to create a “French Islam” that is built upon the Muslims that live in France, and not on influences from abroad.

The Muslim ethnic minority in France

As the terrorist attack against Charlie Hebdo has been perpetrated as a response to an offense towards the religious values of the Muslim community, we will take a closer look to the latter. The Muslim community in France is allegedly composed of around 5 to 6 million people, up to 8% of the population of the country, and the largest Muslim population in Europe. The figures are an approxi-

mation as there are no official surveys available with the number of the Muslim population. Many the members of this religious minority are of North African descent, especially from Algeria, Tunisia, and Morocco. The other Muslim communities in France include people from West Africa, Middle East, and South Asia. Some of the Muslims in France are immigrants, others are second- and third-generation Muslims who were born and raised in France. The highest immigration rate was in the late 1960s and 1970s. The first generation of Muslim immigrants kept a strong connection with their respective countries and families, that were allowed to settle in France in 1976.

Among the main integration problems that the Muslim community considers to be facing in France during the last decades:

- *Discrimination and prejudice*: Some Muslims in France consider facing discrimination and prejudice in employment, education, housing, and other areas of life. These can lead to marginalisation and difficulties in integrating into the community.
- *Economic problems*: Many Muslims live in deprived areas of cities, where there are problems with unemployment, poverty, and lack of resources. These economic problems can be an impediment to integration into French society.
- *Difficulties in education*: Muslims in France are under-represented in higher education and face an education system that does not always offer them equal opportunities.
- *Cultural conflicts*: In France, there are cultural tensions between the Muslim community and the French majority, which can lead to a lack of mutual understanding and respect.
- *Identity problems*: Muslims in France face difficulties in maintaining their cultural and religious identity in a predominantly secular society where traditional values are strongly promoted.

The Muslim Community in France and Radical Islamism

The political effort of integration of an ethnic group cannot, however, trespass the principles of individual freedom. The minority rights must be in accordance with respect for freedom for everyone. As Will Kymlicka put it, *"some ethnic and national groups are deeply illiberal, and seek to suppress rather than support the liberty of their members. Under these circumstances, acceding to the demands of minority groups may result in gross violations of the most basic liberties of individuals"* (Kymlicka 1995: 75). Even if the label of "deeply illiberal" does not apply to the French Muslim ethnic group, but to a very small fraction of it (Jihadism) the French society could not accept all traditional or religious practices of this minority, especially those that violate human rights or are harmful for the members of the respective community. Some well know examples of such practices are the female genital mutilation (FGM), a cultural practice the is common in some

Muslim communities. Another example is the tradition of forced marriages – not exclusively a Muslim practice – illegal in many Western democracies. Wearing of the niqab or burqa, traditional Muslim veils for women, that cover the face, are not accepted in all European countries. In France (2010), in Belgium (2011) and in Austria (2017) the wearing of the full-face veil, including the niqab and burqa in public places is banned by law. The fines for violating the law go from 13750 euros up to 150 euros.

Political response to terrorist attacks against Charlie Hebdo

The main political measures taken in France after the attacks were increased penalties for hate speech and measures to combat online harassment, promote French Republican values through education, promote social cohesion and prevent radicalisation, new anti-terrorism legislation, new “anti-separatism” law aimed at fighting Islamic radicalism, increased security measures, searching new ways of representation of Islam community in politics (Mazoue, 2021).

France’s last two presidents have been confronted, during their terms in office, with very serious incidents due to radical Islamism (the *Charlie Hebdo* terrorist attack in 2015, the Bataclan terrorist attack and the other attacks of 13 November 2015 in Paris, the murder of Father Jacques Hamel on 26 July 2016, the attack of 14 July 2016 in Nice, the murder of Professor Samuel Paty on 16 October 202, etc.) which has led to the fight against radical Islamism becoming a political priority.

These incidents are the proof of a tension inside French society between the majority (represented by a population with secular or Catholic orientation, sharing the Republican values) and some representatives of an Islam minority. If we want to take into account a cultural perception of the situation, Michel Houellebecq, one of the most read and prolific French novelist, expressed controversial views about Islam and Islamism in France. Especially in his 2015 novel “*Soumission*” he imagines a future France where a moderate Islamist party wins the presidential election and gradually transforms the country into an Islamic state. In this novel, Islamism is presented as a threat to French identity and republican values, to secularism, individual freedom, freedom of speech, and democracy.

Muslim ethnic minority and jihadism

There are a multitude of Islamic perspectives in France, including modernist Salafi movements and numerous Sufi orders. TE-SAT, the annual Terrorism Situation and Trend Report published by Europol, defines *jihadism* as “a violent subcurrent of Salafism, a revivalist Sunni Muslim movement that rejects democracy and elected parliaments, arguing that human legislation is at variance with God’s status as the sole lawgiver” (TE-SAT, 2022). Between 2019 and 2021, 29 jihadist or extreme

right-wing plots were foiled across the EU. In 2021, in Europe 11 jihadist attacks were reported. All were carried out by non-natives of the countries of the attacks (Denmark, France, Germany, Hungary, Spain, and Sweden). The ideology of the attackers is “to create an Islamic state governed exclusively by Islamic law (Sharia), as interpreted by them” (TE-SAT, 2022). The use of violence with a reference to the classical Islamic doctrines on Jihad is considered to be legitimized for Jihadists.

The Republic and liberal values

In the wake of the terrorist attacks on Charlie Hebdo, then President François Hollande invoked republicanism and “l’exception française” as the basis for the measures against terrorism and radical Islamism he was to take with the French government: “Aujourd’hui, c’est la République tout entière qui a été agressée. La République, c’est la liberté d’expression: la République, c’est la culture, c’est la création, c’est le pluralisme, c’est la démocratie. C’est ça qui a été visé par les assassins. C’est l’idéal de justice et de paix que la France porte partout sur la scène internationale”. (Morena 2019). We note, with Morena, that there is a “confusion” between the notion of “nation” and that of “republic” in Hollande’s speech, which illustrates the “French exception” (a republicanism that associates the French Revolution and the cradle status of political liberalism). (Morena 2019) The humanist values of the Republic in France are considered to be universal: “elles ne sont pas spécifiques à un peuple ou à un lieu, mais plutôt transcendent les frontières nationales, les cultures, les religions, le genre, la race et l’orientation sexuelle” (Morena 2019). In terms of political correctness, this is characteristic of French political culture, which is not found in the political culture of the United States, for example. This “aveuglement face à la différence” leads to not recognizing groups and communities, but only individual citizens (Morena 2019).

French president Emmanuel Macron said on 4 September 2020, on the 150th anniversary of the proclamation of the French Republic, that freedom of expression remains a fundamental value of his republicanism, alongside the freedom to believe or not to believe: “La liberté dans notre République est un bloc. C’est la liberté de conscience et en particulier la laïcité, ce régime unique au monde qui garantit la liberté de croire ou de ne pas croire. Mais qui n’est pas séparable d’une liberté d’expression allant jusqu’au droit au blasphème.” (Macron, Twitter 2020) In February 2023, president Macron mentioned that the Republic is not above any religion and it is also a matter of faith (“on peut croire ou ne pas croire en République”), but places the latter as an absolute value promoted by the “people”, in the frame of secularity, the guarantee of progress (Macron, Vie Publique 2023).

If we consider France a liberal society (for valuing individual freedom, civil liberties, and the rule of law through a democratic political system), Will Kymlicka would go even further regarding the minority and majority rights regarding religion:

"A liberal society not only allows individuals the freedom to pursue their existing faith, but it also allows them to seek new adherents for their faith (proselytization is allowed), or to question the doctrine of their church (heresy is allowed), or to renounce their faith entirely and convert to another faith or to atheism (apostasy is allowed)". (Kymlicka 1995: 82)

Another aspect of Macron's republicanism is the *inseparability* of the Republic: *"La République, parce qu'elle est indivisible, n'admet aucune aventure séparatiste"* (Macron, Twitter, 2020). Therefore, the ethnic Muslim minority should be willing to delimitate from extremist members and embrace the national identity: *"The sort of solidarity essential for a welfare state requires that citizens have a strong sense of common identity and common membership, so that they will make sacrifices for each other, and this common identity is assumed to require (or at least be facilitated by) a common language and history". (Kymlicka 1995: 77)*

Frédéric Mas believes that this inseparability of the Republic is not to be found in the social, that French institutions do not serve a culturally and politically united people, but *"sur une mosaïque de communautés et d'affinités individuelles singulières qui dépasse largement la question du séparatisme islamique pour remettre en question l'idée même de « peuple » français". (Mas 2020)*

The two meanings of republicanism are the elitist one (based on the praise of meritocracy and rational government) and the populist one (based on the praise of the people and the will of the majority, defended by Le Pen and Mélenchon), the "elitist bloc" gathered around the president and the various forms of populism, such as the Yellow Vests demonstration. It is the triumph of liberty defended by liberalism. (Mas 2020)

On 26 July 2020, a bill against separatism and targeting "political Islam" is announced in France. President Macron presented this bill on 2 October 2020 in Les Mureaux: *"Un des objectifs de ce texte est de lutter contre ceux qui dévoient la religion pour remettre en cause les valeurs de la République"*. (Les Echos) In the wake of the murder of history and geography professor Samuel Paty, the government is announcing new provisions in the bill to ban *"des contenus haineux sur internet"*. The bill is adopted by the National Assembly on 16 February with 347 votes in favour, 151 against and 65 abstentions. The Senate adopts it on 12 April, tightened and renamed *"confortant le respect des principes de la République et de lutte contre le séparatisme"* with 208 votes for and 109 against. (Poussielgue 2020). President Macron announced, in February 2023, in front of a Muslim audience, during the Forum of France Islam (FORIF), all the measures taken against "l'islamisme politique": 28.000 controls operations of Islamic cult institution and worship places, 906 temporary or permanent closures of Islamic establishments, 54 million euros recovered, more than 600 reports made under Article 40 of the Code of Criminal Procedure (Macron, Vie Publique 2023).

Conclusions

#JeSuisCharlie movement is emblematic for a real fracture in French society that French politicians and political analysts have not managed to solve: how to integrate the extremist representatives of an ethnic minority and prevent them from spreading fear of terrorism. Despite initially being endemic phenomenon, the movement has become global, not only because of social networks and the speed of communication in the 21st century, but also because the issue of how to protect freedom of speech in an environment of rising political correctness is still pending.

The classic concepts that usually operate in a discrimination case study are here dynamic: some members of the Ethnic minority feel discriminated and respond with extreme violence against what they consider offensive speech, on a hatred background against secular majority. The majority responds with peaceful protest in favour of freedom of speech, but the effect in French society is fear of using this right of freedom of speech right (journalists and artists from *Charlie Hebdo* have continued their work under protection, at an address that has not been made public).

Freedom of speech is a universal desideratum, but national cultures do not metabolise it in the same way. The #JeSuisCharlie movement and the #JeNeSuis-PasCharlie movement show how polarised French society is on a related issue of political correctness (*how far freedom of expression can go*) and how dangerous this freedom can be in a secular culture that has failed to assimilate radical Islamism. At the same time, it also points to a specific feature of French culture, namely that “the tension between the “république comme Etatnation” and the “république comme système de valeurs universelles”” underlies many of the social and political conflicts in contemporary France. (Morena 2019)

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LIMINALITY AND FASHIONABLE CONCEPTS

THE USE OF INTERNATIONAL RELATIONS THEORIES AND CONCEPTS IN ROMANIA'S STRATEGIES

Radu-Alexandru Cucută

Romanian Liminality

■ Romania's position can be described as a liminal one. The concept of liminality has an established origin in anthropology (Warner 1959; Van Gennep 1960; Turner 1967). Van Gennep argues that every rite of passage includes "preliminal rites (rites of separation), liminal rites (rites of transition) and postliminal rites (rites of incorporation)", even though the importance and development of each sequence is contextually relative (Van Gennep 1960: 11). Moreover, the postliminal period becomes sometimes "systematized in the form of commemorations" (Van Gennep 1960: 149). Social life therefore entails multiple rites of passage, each of them marked by phases of separation, margin and aggregation (Warner 1959: 303). The liminal period is an "interstructural situation", a transition between states, i.e., "relatively fixed or stable conditions" (Turner 1967: 93).

Using the concept of liminality as a rite of passage in international relations is relevant for three reasons. First, the concept can be applied to polities, even though they do not fit the template of relatively small and stable social groups, where many rites are inherently connected with "biological or meteorological rhythms" (Turner 1967: 93), precisely because they "concern entry into a new achieved status" (Turner 1967: 95). Secondly, the value of the concept is given by the inherent ambiguity of the liminal conditions – the place of the liminal group or body is not fixed and it requires its own conceptualization and ontology: people in liminal condition "are no longer classified and not yet classified" (Turner 1967: 96). In Turner's words, "neophytes are neither living nor dead from one aspect,

and both living and dead from another” (Turner 1967: 97). Third, political developments are marked by transitions which do not only resemble rites of passage, but are ritualized as such, with discrete consequences resulting from the changing of the status which is supposed to mark the end of the liminal period. The debate about whether the Balkan region falls within the marginal, liminal or lowermost category (Todorova 2009: 18) highlights the usefulness of the concept. The best case to be made about the relevance of rites of passage and liminality is by looking at Romania’s integration process. Accession to the EU and NATO can be seen as a rite of passage, which entails a discrete separation from the previous “state” (Turner 1967: 93) – the identity and characteristics of Romanian communism. Democratization and the establishment of a market economy, the adoption and implementation of the Copenhagen criteria, become prerequisites of accession. EU and NATO membership status can thus be considered as a “state” quantitatively and qualitatively different from the previous one.

While Romania joined NATO in 2004 and the EU in 2007, it is possible to argue that liminality remains relevant. First of all, the post-revolutionary transition was a long period, which inevitably generates political and social consequences. Secondly, at least in the case of the European Union, the accession was marked by sui-generis conditionalities, such as the imposition of the Cooperation and Verification Mechanism (European Commission 2006). Moreover, the fact that Romania and Bulgaria still have to join the Schengen Area and eventually adopt the Euro (Official Journal of the European Union 2005) can be interpreted as a continuation of the liminal period either because all the liminal rites (rites of transition) have not been concluded or because all the postliminal rites (rites of incorporation) have not been performed. Romania is a member of the European Union, under a form of conditional verification and, in many regards, still a candidate (to join the Schengen and Euro Area). The symbolic value of liminality is highlighted by the manner in which the transition manages to dominate the political space: it is not ironic that immediately after Brexit, the Romanian president felt the need to talk about the importance of finding a post-accession project to guide Romanian politics (Iohannis, 2016), a discourse reminiscent of Turner’s argument that the liminal period “may partly be described as a stage of reflection” (Turner 1967: 105).

In addition to political liminality, there is also geographic liminality. Geography is a form of discourse that “spatializes” international politics, creating narratives which fit the socially constructed geographical space (Tuathail–Agnew 1992: 192). This form of discourse, which calls for specific policies to fundamentally manage an element, space, seen as unchanging and unaltered (Dodds 2019: 3), entails discrete characteristics of the peoples and polities inhabiting specific spaces. Nonetheless, the borders between the major geopolitical units, clearly defined in terms of identity, discourse and practice, are difficult to establish, thus creating a space of borderlands, with their peculiar position between the familiar and the significant Other (Goldsworthy 1998: 2–8). On the other hand, it is precisely the ambiguity of the border region – too familiar to be part of the *orientalist* construction

(Said 1979: 3–8), but different enough to be apart from Western self-depictions of politics and identity – which encapsulates the idea of liminality. Geographically, Romania remains between created spaces and practices. This liminal position explains also a paradox – first, this intermediary position nonetheless allows elites and societies alike to challenge the discursive divisions and practices – in a sense, accession to the EU and NATO becomes a geopolitical quest of disproving the geopolitical labels. The Presidency, for example, in its website presentation of Romania, is adamant that the country belongs to Central Europe, while being at its frontier with Eastern Europe and the Balkans. (Institute of Geography of the Romanian Academy 2021). Secondly, the self-perception of Romania’s position as a border or as a frontier, as a country at the intersection of several Empires, as a staunch defender of the Western Christian world, has a significant cultural and historical tradition (Boia 2001: 155–157). Additionally, there is the epistemic liminality to consider. The paper does not dwell on whether International Relations concepts are a Western-centered discipline or product (Acharya and Buzan 2010, Acharya and Buzan 2017). Alternatively, it is possible to consider the Romanian reaction to dominant theories and concepts a form of subalternity (Spivak 1988) or mimicry (Bhabha 1994). Concurrently, is difficult to argue against the relevance of investigating the incorporation of knowledge into official documents from a post-colonial perspective (Todorova 2009: 201, Filipescu 2015). Nonetheless, Romanian academic and political elites remain outside the Foucauldian power-knowledge matrix (Foucault 1977: 13) or, alternatively, subjects influenced by a Gramscian-like intellectual hegemony (Gramsci 1992: 12). The concepts and theories adopted are very difficult to challenge, but their relative meaning reflects the peculiar liminal position.

Fashionable Theories and Concepts

The use of fashion in the present paper is related to the perspective espoused by Libiseller (Libiseller 2023). Concepts and theories become fashionable independent of the people who author them, are a function of power and the prestige associated with their adoption by state or international institutions only serves to reinforce their fashionability (Libiseller 2023). The paper is agnostic in relation to the specific process by which a concept or a theory becomes fashionable, or, indeed, “dominant”.

However, I argue that because of the specific manner in which these theories and concepts are articulated and employed by their adopters, the process is not simply a direct one – the overt manifestation of a form of power dressed in academic terminology. The adopter, in this case, the academic and political elites, which are seen as a community of meaning (Yanow 2000: 10–13) involved in the drafting of the analyzed strategies, “adapts” and gives additional meaning to the fashionable concepts and theories, by interpreting and understanding his own

position. The analysis will highlight also that successive fashions are not mutually exclusive. In fact, liminality encourages the retaining of remnants of previous fashionable cycles of theories and concepts, resulting in but multi-layered intellectual constructs.

The adoption of fashion concepts is encouraged and influenced not only by their use by international institutions (resilience, in the case of the EU and hybrid warfare in the case of NATO), but also by liminality, specifically because the liminal position is one of ambiguity and uncertainty. The adoption of fashionable concepts and theories serves several purposes. On the one hand, their adoption is seen as a form of incorporation of the values and norms which define the end-state of the postliminal period. On the other hand, their adoption is facilitated precisely because, due to their vagueness and elasticity, they seem to cover a significant tract of the problems that liminality entails. In a quasi-feedback loop, the reference to fashion concepts is required by liminality and is also a solution to its vagaries.

At the same time, it is important to look at the symbolic and ritualistic nature of these strategies. In a sense, these documents do not only encapsulate a strategic narrative and play the role of trying to solve the identified problems within the ends, means and ways triad (Lykke 2001: 179). They can also be seen as the ceremony corresponding to a rite of incorporation, performed during the liminal stage: the multiple references to NATO and the EU, as well as the drafting of a defense or military strategy can be seen as ceremonies pertaining to incorporation rite, albeit in a liminal state.

Methodology

The methodology of the paper is a qualitative one, based on an interpretive textual analysis. Stepping away from the assumptions of epistemic neutrality, analysis can focus on the intersubjective meanings of concepts and discourses (Yanow 2000: 5–10). The paper will analyze the 2020 Romanian National Defense Strategy (hereinafter DS), the 2021 Military Strategy (hereinafter MS), as well as the 2021 Defense White Paper (hereinafter WP), in order to see how concepts and theories are employed, to ascertain their intersubjective meaning, within an interpretive methodological framework (Hollis 1994: 142–162, Hollis and Smith 1991: 1–7). The analysis will highlight how concepts such as “hybrid warfare” and “resilience” are used in an attempt to make sense of the international environment, its strategic challenges and how their employment frames Romania’s strategic efforts. The presence of additional theoretical frameworks, especially Realism, the perspective of the Copenhagen School and geopolitics, as well as liberalism and the influence of nationalism will also be investigated, in relation to the fashionable concepts. Last, but not least, the implicit influence of securitization is discussed within the larger framework of the paper.

Concepts and Theories in the Romanian Strategies

Romanian strategies exhibit multiple successive layers of influence: while the bedrock can be ascribed to a very peculiar form of realism, which interprets international politics based on the global and regional distribution of power, with geopolitical accents, there are nevertheless residual elements of nationalism (the primacy of the state, and the references to national identity and culture) and liberalism (the references to multilateralism and the UN Charter). The realist stratum is complemented by a methodological adaptation of the Copenhagen School's perspective, which is meant to accommodate the fashionable concepts of resilience and hybrid warfare.

One of the peculiarities of the strategic discourse in Romania is the fact that the role that a national security strategy should play is legally constitutionally ascribed to a "national defense strategy". The president must present the document before Parliament within six months after taking office (Parliament of Romania 2015), and only enters into force after being voted by the Legislature (Parliament of Romania, 2007). Romania therefore has both a national defense and a national military strategy, a situation ascribed to the influence of the traditional view of security, which sees symmetric threats as intrinsically more significant than asymmetric ones (Soare 2008: 57).

The liminal dimension is made clear by the National Defense Strategy, which expresses it in several ways: Romania's "significant" role within NATO and the EU consists of assuring security at their external frontier and in the Black Sea Region (DS 2020: 4). Romania is a state on the "Eastern flank" of NATO and the Eastern Frontier of the EU (DS 2020: 21).

The strategic environment is nevertheless one seen from a realist perspective – "global evolutions" are driven by the shifting balances (sic) of power (DS 2020: 6). However, the changing distribution of power results not only in increased great power competition, which the document labels as "the resurgence of geostrategic competition" (DS 2020: 17, 19) but is, in a sense, also responsible for what the strategy sees as a climate of global "uncertainty and unpredictability" (DS 2020: 19). In a similar vein, uncertainty is the result of a transition towards a "stratified multipolar system" (WP 2021: 10). Romania's position is that of bandwagoning with the United States, given the fact that the US is expected to remain the "pre-eminent" power in this environment (DS 2020: 19).

Residual traces of trust in international institutions also remains represented in the documents – consolidating multilateralism and an international order based on the UN Charter rules is a national interest (DS 2020: 15). There is a possibility of taking part in UN missions (MS 2021: 9), but only with observer and staff officers (WP 2021: 23). The references are nevertheless subordinated to the realist logic – the non-Western contestation of this order can lead to altering the global and regional distribution of power (DS 2020: 18).

It is also important to note the manner in which the Strategy has institutionalized a very peculiar interpretation of the Copenhagen School. The discussion regarding the nature of the sectors of security (Buzan 2016: 34-35, Buzan, Waever, de Wilde 1998: 8-9) or securitization as a speech act (Buzan, Waever, de Wilde 1998: 35-42) were perceived not as abstract instruments for a better understanding of International Relations, but as an explicit permission to include matters of political interest deserving of their own sector: beside national and regional security, the document discusses energy security and cyber security, critical infrastructure and historical and cultural heritage security (DS 2020: 7), as well as “environmental security” (DS 2020: 37), within the framework of “extended” or “multidimensional” security (DS 2020: 7, 19). The faulty understanding of the Copenhagen School’s perspective is highlighted by the manner in which the “societal” label is used: originally coined in order to discuss issues pertaining to identity (Buzan, Waever, de Wilde 1998: 119–120), the Romanian documents use it simply as a synonym of “social” or as a form of residual category. Everything fits this label if there is not a specifically designed institution to manage the problem. Hence document’s use of “societal resilience” (DS 2020: 11, 23) or “societal vulnerabilities and actors” (DS 2020: 12). In a sense, the sectors of security and the securitization process become the implicit methodology which accommodates the fashionable concepts into the strategic framework. Their prevalence is highlighted by their abundant use throughout the documents: “hybrid” is mentioned 19 times by the National Defense Strategy, 11 times by the Military Strategy, 10 times by the Defense White Paper. “Resilience” is mentioned no less than 33 times in the Defense Strategy, 28 times by the Military Strategy and 25 times by the White Paper.

Hybrid warfare

The use of “hybrid warfare” is close to the manner in which it was employed by NATO (Libiseller 2023) – Russian aggressive behavior consists of both actions of militarizing the Black Sea Region and hybrid ones (DS 2020: 7, 22). The vagueness and elasticity of the concept soon becomes apparent: unpredictable global security evolutions comprise not only pandemic or environmental ones, but also have a hybrid dimension (DS 2020: 8). Moreover, cyber threats are lumped together with hybrid ones (WP 2021: 16), as forms of interference in domestic matters (DS 2020: 18). The vagueness of the concept is increased – while “hybrid tactics” can be employed by hostile state actors, they comprise both threats of using force and asymmetric actions (DS 2020: 16, 20). Treating the hybrid dimension as both a tactic and a strategy, without clarifying the differences between them (MS 2021: 7), arguing that hybrid actions and strategies are characteristics of the operational environment further complicates the understanding of the concept. Hybrid actions are seen as capable of having strategic impact (MS 2021: 9), whereas “hybrid tactics” can be seen as a useful alternative given the low chances of major armed conflicts

(WP 2021: 12). In fact, “hybrid warfare” is used as a counterpart of both conventional warfare (MS 2021: 26) and a complement of asymmetric warfare (DS 2020: 6, WP 2021: 11). The vagueness and flexibility of fashion concepts facilitates their inter-connection. For example, educating pupils consolidates resilience, thereby decreasing their vulnerability to fake news and disinformation, specifically labelled as hybrid threats (DS 2020: 11); there is a need to increase resilience to asymmetric and hybrid threats (WP 2021: 28). Moreover, destabilizing propaganda can be part of “hybrid-type campaigns” (DS 2020: 28–29). Similarly, global unpredictability resulting from the changes of the balance of power can lead to the resurgence of frozen conflicts and multiple asymmetric and hybrid ones (WP 2021: 11).

Resilience

Resilience is defined as the capacity of individuals and communities to adapt to violent events, and to revert fast to a functional state (DS 2020: 11). The definition echoes the official EU definition (European Commission 2020) and its underlying study (Manca–Benczur–Giovannini 2017: 5). It is important to note that the elasticity of the concept can be traced also to the European perspective, which discusses four dimensions of resilience: social and economic, geopolitical, green and digital (European Commission 2020).

Resilience is seen both in teleological and instrumental terms. On the one hand, “transforming the country into a resilient state” is a paramount objective (DS 2020: 6). On the other hand, resilience becomes instrumental in ensuring that the Romanian state has the capacity to manage the multidimensional and ultimately unpredictable threats to its security, being linked with flexibility and adequate crisis response (DS 2020: 6). Furthermore, it is unclear what the difference between resilience and resistance actually is. The National Military Strategy defines resistance as the capacity to continue the mission in unfavorable circumstances whereas resilience is “the ability to withstand a blow, recover quickly and fight back decisively” (MS 2021: 25). Making use of the definition of resilience used by the National Defense Strategy, military resilience is defined as the “ability to absorb kinetic and non-kinetic shocks” as well as the ability to generate forces and operate after being surprised by an opponent (MS 2021: 26). The convoluted relation between resistance and resilience is expressed by the conviction that both are based on “the ability of organizations and citizens to survive and resist, by violent or non-violent means, to the occupying forces” (MS 2021: 27). Strategically, resilience can also serve as a deterring factor (WP 2021: 7).

The blending between the concepts is highlighted by the use of “societal resilience”, which can be increased by awareness raising measures, by changing the education curriculum and increasing digital competences (DS 2020: 23). There are also explicit mentions of the importance of increasing resilience in regards to asymmetric and hybrid risks and threats (DS 2020: 16), the “resilience of the medical

system" (DS 2020: 29), economic resilience (DS 2020: 8), state and national resilience (DS 2020: 10), critical infrastructure resilience (DS 2020: 11), fiscal system resilience (DS 2020: 27), low resilience to disinformation (MS 2021: 8), military system resilience (MS 2021: 13), military education system resilience (MS 2021: 18), resilience to asymmetric and hybrid threats and risks (WP 2021: 28). To complicate things further, the Romanian military is responsible for national resilience (MS 2021: 3), defense planning is expected to "ensure resilience" (MS 2021: 16–17), while having a "resilient defense information system" (WP 2021: 34). R&D is expected to ensure the resilience of the military (WP 2021: 48).

Civil society

It is important to note that the references to civil society are simply discursive elements simply meant to convey an air of legitimacy. Managing security entails "the participation of civil society" (DS 2020: 7), but this can only be possible within the confines of a "strong state" (DS 2020: 8). Moreover, both the state and civil society are involved in providing good governance (DS 2020: 9). However, civil society is not without its flaws: tolerance encouraging policies are needed (DS 2020: 16). It can be vulnerable to "hostile influence actions" (DS 2020: 25), whereas its low level of "security culture" is seen as a vulnerability (DS 2020: 29). References to civil society become another fashionable accessory with no significant institutional or political implications within the institutional and conceptual framework of the strategy.

Conclusion

The paper has argued that liminality favors the adoption of fashionable concepts and theories specifically because their vagueness and flexibility seem to offer an adequate labeling of the problems of the liminal position itself. Hybrid warfare and resilience form the latest addition to the Romanian strategic framework. The hybrid label seems to cover all aspects of unconventional threats, risks and vulnerabilities. Resilience, analytically identical to resistance, is the quasi magical antidote to "hybrid" problems, hence the emphasis on increasing or consolidating different forms of sectional or institutional resilience. The assumptions of the strategic framework remain grounded in a form of realism carefully looking at the global distribution of power, while a peculiar understanding of the Copenhagen School seems to be the methodological framework which facilitates the adoption of the very vague fashionable concepts.

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CLASHING VISIONS FOR DEVELOPMENT

THE AGE OF STRATEGIC UNCERTAINTY

Paul Dobrescu–Flavia Durach

■ Introduction: the age of strategic uncertainty

■ At the moment, the world goes through an age of strategic uncertainty, stemming from multiple sources. Unpredictability is associated with the complexity of the era we live in (Taleb 2010), with its many overlapping crises, each demanding immediate answers, but also medium and long-term solutions. The United Nations noted, with respect to their 2021/2022 Human Development Report a new “uncertainty complex” is emerging (Human Development Report 2022). Each crisis requires stand-alone strategies, but also unifying visions to integrate measures in a unitary approach, intended to guide the overall progress of the society.

The paper follows a qualitative approach to analyze the aforementioned issues, and to discuss relevant case studies. We use secondary data analysis of the most recent, analyses, reports and data available to identify main challenges and to inform on the implementation of a new strategic approach for development. Given the interconnected nature of current crises, finding solutions should follow a whole-of-society approach. As such, the authors make recommendations for the representatives of the civic society on how to contribute to the creation of a new vision for development, a vision that prioritizes the actual needs of society and addresses the macro-level implications of the aforementioned web of crises.

The overlapping crises we are facing do not represent a sum of crises, but a new problem altogether, one that sets back development in many countries (Human Development Report 2022). This calls for a new vision able to respond to each individual crisis, but also to the evolution of the whole. We can deal with a crisis on

its own, but that area cannot be considered “healed” until the negative influences from related areas are canceled. Solving a crisis must include at least two stages of intervention: the first focusing on the particularities of the crisis itself and its field of manifestation, and the second dealing with the broader economic and social implications.

The References on development focuses on many factors that account for the differences in development outcomes across the globe - the pursuit of strategic, selective objectives being among them (Goldin 2019: 14). Another poignant example comes from the very dynamic field of Artificial Intelligence, where incremental changes take place every year. Here, the presence or absence of strategic orientations can make the difference between leaders and countries that lag behind. It is the absence of a strategy to unite efforts and give them direction that left the European Union behind its main competitors (Savage 2020). Recently, the White Paper on Artificial Intelligence (2020) was adopted, setting ambitious targets at the continental level. On the other hand, in order to keep its maintain its global dominance, the US follows a vision, a strategy of deterrence in the technological field, especially directed towards China (Segal 2019).

Here is the fundamental problem of the moment. Overcoming current challenges requires a more extensive and more decisive strategic orientation than it appears at first sight. Leadership-wise, it involves moving the center of gravity to the whole. The energy crisis, inflation, recession, climate change – each requires a strategy at least in the medium term, especially since none of them can be solved overnight. But their inclusion in a unitary vision is imperative and requires the strategic approach of a greater objective.

We believe the age of visions has come, intended to provide an answer to the overlapping crises with which contemporary society is confronted. Today’s challenges are fueling a crisis of the whole, which can only be overcome through a new vision, through a grand strategic shift.

The issues presented in this paper are relevant for the representatives of civil society. Different organizations of the civil society are acutely aware of the pressing issues in their field of action. In this sense, they have a very particular, context-based vision for how progress (or development) should look like in their own area of expertise. However, there is need for a better awareness on how different priority areas are interconnected and influence each other. The present study provides insights for the civil society on the need for a unitary vision, one that takes into account all systemic imbalances that need to be addressed as a whole, for creating a healthier society.

Method

Starting with these observations, the paper will use three case studies to illustrate the idea that, in order to respond to rising uncertainty and overlapping crises, a unitary vision, a more decisive, comprehensive strategic orientation is needed.

The research questions that guide the analysis are as follows:

RQ1. What is the importance of developing a unitary vision and a comprehensive strategy for overcoming interconnected/ overlapping challenges at a global level?

RQ2. What is the relationship between individual priorities and development as a whole?

In order to shed light on these issues, we follow a case study research approach, which allows for the investigation of a contemporary phenomenon in its real-life context, by using multiple sources of evidence (Crowe et al. 2011; Yin 1999). Our approach is exploratory and multi-case, in order to compare and highlight different aspects of the research problem.

We have selected case studies that capture the characteristics of the phenomenon we study: high uncertainty, high importance for development, high interconnectedness with other issues or contemporary challenges. The case studies have another shared feature: they make the object of intensive power competition at a global stage. For each case study, we conduct an analysis of qualitative data (recent studies, reports and statistics from reputable secondary sources) to answer the research questions.

The case studies selected include:

1. The AI-driven technological revolution, chosen for its impact in all areas of life, and for development;
2. The competition for the difficult and expensive exploitation of rare earth elements, of crucial importance for a wide range of modern technologies;
3. Big Tech and their disruptive impact in society; we use this case as an illustration of how difficult it is to reconcile individual priorities with the interests of the whole.

Analysis and discussion

Case study 1. The new technological revolution. The AI-driven technological revolution has been praised for its ability to transform societies, and to open new horizons of progress (Makridakis 2017; Vinuesa et al. 2020). Over time, it was discovered that this rapid progress also presents challenges, such as deepening domestic inequalities, and global inequality between states (Schwab 2021). Since these risks cannot be eliminated altogether, states need to plan ahead to mitigate them: "Deprived of the chance to claw their way out of poverty, poor countries will stagnate while the AI superpowers take off." (Lee 2018: 170).

It is in the nature of the areas that make up the new technological revolution to evolve in an integrated manner, each component element depending of another, progress being occasioned precisely by interdependence as the fundamental particularity of progress in the field of new technologies. As shown elsewhere, one of the most significant features of AI is that it needs to have all components working in a in a certain rhythm and in a certain correlation (Dobrescu–Durach 2022: 36). Algorithms rely on big data series to be competitive; this favours the larger, established players, compared to the smaller ones – a phenomenon known as “the network effect”ⁿ (Tucker 2019). Countries of organizations with strong traditions in the field of technological innovations could fail in the absence of a friendly entrepreneurial environment. Innovations might not be capitalized upon if the organization or the state lack the financial strength to implement the discovery at scale. Therefore, being truly competitive in the field of AI requires the simultaneous existence of several conditions: funding, entrepreneurship culture, access to big data, and, overall, strategy and coordination (Dobrescu–Durach 2022).

“The fourth industrial revolution” (Schwab 2017), is dominated by critical technologies in a number of key areas: advanced materials and manufacturing; artificial intelligence; computing and communications; energy and environment; quantum technologies; biotechnology, gene technology and vaccines; sensing, timing and navigation; defense, space, robotics and transportation (Gaida et al. 2023).

For every nation involved in the global technology race, winning is a question of having the capacity to support relatively similar levels of progress for each area, being able to ability to attract and retain global talent, and to stimulate innovation (Gaida et al. 2023; Hass et al 2021). In these conditions, having a particular vision for technological development is the essential factor to stay ahead of the race, but also to exert a type of control, to strategically channel the potential of emerging technologies.

The management of the contemporary technological revolution entails two directions for action: the speed at which progress takes place, and the management of the financial, human and conceptual efforts involved. Both dimensions have a cardinal role in taking full advantage of the potential of critical technologies and strategic industries.

In what the speed of progress is concerned, being the first to develop a new technology provides immense advantages (Azhar 2023). This advance can be amplified exponentially, through the rapid succession of innovations and their commercial implementation. The tech pioneers aim to capitalize on the advantages of their discoveries, in terms of commercial benefits, but also in terms of the accumulation of new data, frequently use to develop new, better products and services.

No less important is the effort to support the AI race as the new arm’s race of the moment (Chow and Perrigo 2023; Kamphuis and Leijnen 2021). The cardinal question in this regard is: how many states can afford support the technological race, how many countries can aspire to a type of autonomy? The answer given by Azeem Azhar is clear – there are only two solutions: to achieve strategy autonomy,

or to associate with powers that can do that (Azhar 2023). Since not every country can carry out state-of-the-art research activities to support today's technological competition, they will aim ally with those who are in the outposts of the contemporary technological race, changing the geopolitical contours of today.

According to recent analyses, today's technology race is dominated by the US and China (Gaida et al. 2023). One of the key conclusions of the aforementioned policy brief is that "China has built the foundations to position itself as the world's leading science and technology superpower" (Gaida et al. 2023: 1). This harsh conclusion is built on the tradition of excessive criticism of Western powers, in order to mobilize policy actors for conclusive action to avoid the risk of lagging behind, and the aforementioned policy brief follows this logic: "These findings should be a wake-up call for democratic nations, who must rapidly pursue a strategic critical technology step-up." (Gaida et al. 2023: 1). The policy brief discusses the global technological competition by looking at critical and emerging technologies in domains in key areas. Forty-four technologies are mapped in the report, and China is leading in 37 of them. Although the US leads in areas such as high performance computing, quantum computing and vaccines, and has important tech research hubs located in Silicon Valley or leading universities, it comes second to China in the majority of the 44 key technologies. Based on these results, the authors make a claim that may be a little harsh: „Western democracies are losing the global technological competition, including the race for scientific and research breakthroughs, and the ability to retain global talent—crucial ingredients that underpin the development and control of the world's most important technologies, including those that don't yet exist" (Gaida et al. 2023: 1).

The technological race is being led by US and China; they are followed, at a distance, by a second-tier group of countries led by India and the UK. Other relevant actors include South Korea, Germany, Australia, Italy, and, to some extent, Japan. Within this second tier, we find visible differences in the strength of their economies (GDP size) and the position they hold in this particular hierarchy. UK would rank in the top five technological powers, ahead of Japan, for example, which has a much larger GDP than UK's (The World Bank, 2021). France has an economic strength equivalent to that of UK, but it does not appear in this group of followers. Where does the difference come from? It is clear that economic strength alone is not sufficient to account for progress in the technological race.

For the purposes of this case study, we are interested in the factors accounting for technological supremacy. China's spectacular rise in a field where American authority seemed unchallenged until recently offers valuable insights: "China's lead is the product of deliberate design and long-term policy planning" (Gaida et al. 2023: 1). As discussed elsewhere, China's rise in AI is rooted in Deng Xiaoping's strategy summed up in the formula "development is the only truth that matters." (Dobrescu–Durach 2022). The Chinese leader formulated a program that structured priorities around development, accounting for China's spectacular progress.

The importance of having a strategic focus is inherently stressed in the policy recommendations section of the aforementioned policy brief on the technology race. For maintaining their dominance, democratic nations should work individually and collectively to take action under four themes: “1. boosting investment, driving commercialization and building talent pipelines; 2. global partnerships; 3. supercharging intelligence efforts; 4. moonshots (big ideas).” (Gaida et al. 2023: 44). In fact, upon closer analysis, the study we are referring to illuminates with extraordinary force the decisive importance of strategy in the rise of a country as a scientific and technological power. Not only the great powers in the field should focus on the strategic level; any nation, larger or smaller should set ambitious goals for its own development. Vision can be found at the upstream of research, technology, and innovation.

However, finding ways to cooperate is not an easy feat. As Azhar (2023) points out, breakthrough technologies face significant risks, among which the exacerbation of geopolitical frictions and the muddying of the definitions of who an ally or a rival is. It is an area of overlapping cooperation and competition that needs to be addressed at the strategic level in order to gain autonomy and competitive advantages. Nevertheless, the importance of breakthrough technologies as backbones of public goods urges governments to develop grounded strategies that reinforce non-zero-sum thinking around technology.

Case study 2: rare earth elements. When talking about development strategies to guide the progress in key areas, such as the technological one, one fundamental issue is to look at potential evolutions that might act as catalyzers or barriers in that field. It is the case of the rare earth elements. Rare earth elements are a group of 17 chemical elements essential to a number of fields, among which transportation, energy, defense, and aerospace industries. These metals are an essential element of modern industries and, as such, are important in the global supply chains.

What is the situation of rare earth elements? Although generally available across the globe, some of the largest reserves are concentrated in China, which “still dominates the entire vertical industry and can flood global markets with cheap material, as it has done before with steel and with solar panels. In 2022, it mined 58% of all rare earth elements, refined 89% of all raw ore, and manufactured 92% of rare earths-based components worldwide” (Mabuni 2023). This position of monopoly can be traced back to the 1990s. Since then, Canada, India, and UK have declared their intent to develop domestic refineries, and the US supports the buildout of processing facilities, and tax incentives for critical mineral businesses (Mabuni 2023). Despite these efforts, the overall picture shows that China’s dominant position in this field is maintained.

It is necessary to make a clear distinction between the presence rare earth elements reserves, its mining and, then, its refining, the export being made especially with refined products. Processing rare elements is difficult and expensive (Science of Rare Earth Elements 2020). China’s refining capacity ensures not only

a monopoly position, but also dominance in the supply chains. More specifically, China refines 68% of the world's nickel, 40% of copper, 59% of lithium and 73% of cobalt. The case of cobalt is telling: „America views cobalt, which is used in batteries, as a cautionary tale. In Congo, the source of about 70% of global production, Chinese entities owned or had stakes in 15 of 19 cobalt producing mines as of 2020. America's decision to allow a US firm to sell one of Congo's largest copper-cobalt mines to a Chinese one in 2020 is seen as an enormous act of stupidity. „We can not allow China to become an OPEC of one in critical minerals.“ (How America plans to break China's grip on African minerals 2023).

There are geopolitical implications, besides the economic ones. Europe had no reaction when China occupied important positions in Africa, a continent considered the backyard of the old continent. Recently, it was discovered that Greenland is the second largest holder of rare metals after China. As the ice cap retreats, mining companies that want to exploit these deposits make their way. The mining and processing costs are huge, 500 million for a mine. So far, two such companies have been announced, one of them being financed by the Chinese state (Gronholt-Pedersen–Onstad 2021).

Where is Europe in this endeavor taking place right on its territory? According to the European Commission, the EU relies almost exclusively on imports for many critical raw materials, with suppliers highly concentrated in a small number of third countries (Critical Raw Materials Act 2023). The EU is currently 100% dependent on foreign suppliers for 14 out of 27 critical raw materials and 95% dependent on three other critical raw materials (Menkhoff and Zeevaert 2022). The Critical Raw Materials Act, officially presented in March 2023, proposes a comprehensive set of actions to ensure the EU's access to a secure, diversified, affordable and sustainable supply of critical raw materials. President of the European Commission, Ursula von der Leyen declared that “We're strengthening our cooperation with reliable trading partners globally to reduce the EU's current dependencies on just one or a few countries. It's in our mutual interest to ramp up production in a sustainable manner and at the same time ensure the highest level of diversification of supply chains for our European businesses.” (Press release: Critical Raw Materials 2023). The Regulation sets clear benchmarks for domestic capacities, by 2030: at least 10% of the EU's annual consumption for extraction, at least 40% of the EU's annual consumption for processing, at least 15% of the EU's annual consumption for recycling, and no more than 65% of the Union's annual consumption of each strategic raw material at any relevant stage of processing from a single third country.

The fundamental problem remains: EU's vulnerability is delayed action, reactive action. From a strategic perspective, the block should take action directed towards the realities of tomorrow, instead of reacting to the dominant trends of today.

Case study 3. A question of priorities: the parts or the whole? One of the most delicate problems is the balance between disparate priorities and the whole. “Priorities” and “prioritization” have become buzzwords when talking about devel-

opment and the future. Coming up with a list of priorities has an undeniable legitimacy, but only relative to the whole. When priorities arise from a vision, they contribute to the positive evolution of the structure within which it operates. When priorities are detached from an integral vision, they ignore the whole within which they should be considered. The way AI corporations have evolved illustrates the risks of single-minded focus. As revealed from the publication of internal research and analysis, Facebook and Instagram prioritized certain content and practices even though they knew they had negative effects (Lima 2021). One reproach to be made to the companies and corporations that are pioneering Artificial Intelligence is that they “pursue a single objective at the expense of all others” (Korinek 2021).

Today’s world has received an extremely important warning in this regard from the area of emerging technologies. Society was late to realize the societal risks posed by these technologies. Thus, it was late in offering a response to guide the evolution in this extremely dynamic field. Today’s technological revolution proves to be by far the essential factor not only in economic and social modernization, but even in the remodeling of social evolution, in the redistribution of power at the global level (Schwab 2016). The rapid developments in the digital technologies triggered crises in other fields as well, such as, for example, the public sphere. The core elements of this crisis of the public sphere, as noted by scholars in the field, are the intense exploitation of citizens’ private data and experiences by private businesses, increased polarization, proliferation of online disinformation, and the increased weaponization of the new digital technologies by state and non-state actors (Arora et al. 2022; Bârgăoanu–Durach 2020; Singer–Brooking 2018; Zuboff 2019).

In time, evidence on the social harm brought by the misuse of the digital platforms started to accumulate. Furthermore, revelations on how the structural deficiencies of the digital platforms can trigger a crisis of the public sphere took policy makers by storm. Despite vivid debates, including hearings of the Big Tech CEOs in the US senate or in the EU institutions, response measures have been almost exclusively reactive. The EU adoption, in 2022, of the Digital Services Act package, which is the most comprehensive regulatory framework of the digital space in the world, is an attempt to address some of the unwanted impact of the digital superpowers in key areas (Digital Services Act 2022; Digital Markets Act 2022). However, the package comes as a response to the documented negative effects of digital services and technologies that are prevalent today, with limited capacity to foresee future challenges. Its relevance and adaptability in one, two or three decades from now remains to be seen. In the US, where the majority of Big Tech companies are based, there is even less progress in coming up with a strategy to curb the monopolistic power of the largest digital technology companies and its unwanted consequences (Morar–Riley 2021).

Overall, the rapid positive and negative developments triggered by the digital revolution prompted political leaders and policy-makers to accelerate the process of strategy elaboration and, thus, gained prominence at the forefront of contem-

porary developments. While the technological revolution poses significant challenges, and brings great promise for development, the prioritization of this field must be integrated into the bigger picture. It is a risky practice to set priorities insufficiently correlated with the interests of the whole. We found the position of the French Minister of Finance, Bruno Le Maire, formulated in Davos to be particularly significant for this type of one-sided vision: “The key question is not China first, or United States first, or Europe first. The key question for all of us, and for all the nations in the world, is climate first” (Javed 2023). No one can deny the importance of fighting climate change. But such an issue cannot be considered more important than the development and exploitation of emerging technologies, for example. One argument for this: „PricewaterhouseCoopers estimates AI deployment will add \$15,7 trillion to global GDP by 2030.” (Lee 2018: 18). The contemporary digital revolution will not only add a great deal of wealth, but will provide the technological and financial means without which climate change cannot be achieved. In the present example, addressing climate change should not be placed not above the technological revolution, but shoulder to shoulder with it.

Focusing on isolated priorities might suggest a goal-oriented approach, when it is in fact a substitute for a comprehensive strategy that is missing. Priorities should be integrated into a broader vision, which implies highlighting the interconnections between different priorities serving the whole.

Discussion and conclusions

If economists talk about the importance of critical raw materials, social scientists should talk about critical social areas, and one of them – the most important – is the worrying decline of strategy elaboration, the little-used capacity for strategic projection, for anticipating developments, for preventing imbalances. The more the complexity of society increases, the more the need for strategy increases. A certain misunderstanding persists. Strategic thinking focuses on correlations, on their role, on the cost of underestimating or neglecting the multiple interconnections within modern society. Overwhelmed by all kinds of challenges, signals, pressures, we failed to grasp the significance of our main task: the construction of unitary, coherent visions to guide the evolution of the whole. It is the only solution for society to be at the forefront of contemporary development and not just to follow uncoordinated developments experienced in various fields. Contemporary society has been taken by surprise by the rapid technological evolution, by the energy crisis, by climate change. In this way, policy-makers acted in the wake of the changes and not proactively; they simply followed change, instead of bringing change.

The paradigm shift in the field of development that we are experiencing stresses the need for long-term vision. A first element of the paradigm shift is represented by the changes in the globalization infrastructure. In other words, the reorienta-

tion of commercial flows, those which dominated yesterday's world and are experiencing a structural transformation, designed to avoid the risks of dependence and ensure additional security of supply. Yesterday's world benefited from cheap money, which stimulated economic activity; in today's world, money is more and more expensive. Yesterday's world was dominated by cooperation, today's world increasingly by division; in yesterday's world the low price and the profit margins were leading values; in today's world, these values do not disappear, but are outweighed by other goals related to security, the observance of overall balances, etc.

The warning coming from Kristalina Georgieva, general director of the IMF is telling: „First and foremost, it means that we need to change our mindset towards more resilience, more precautionary actions... We cannot just concentrate on what is cheaper. We have to think of the security of supplies and that means diversify the sources of products that make the economy function well, lifting up the level of cost. That economic logic is not only appropriate, it is a must to follow.” (Georgieva 2023).

Nothing calls for a paradigm shift more than a collapse of trust. In most developed countries, trust in the government has visibly decreased, if not collapsed. Trust does not have the precision of an economic indicator, but it sets two fundamental things: the quality of government and the way in which the common good is served. The decline in confidence clearly shows that governance is no longer so much guided by the values of the common good. It is the responsibility of the elites to rehabilitate the idea of anticipation and preparation for future evolutions, to ensure social macro-equilibrium (inequality has increased everywhere in the developed world) and, above all, to regain the trust of the population. Without trust, democracies malfunction. We need a fundamental tradeoff between policies that seek to maximize economic growth with those that seek a more equitable distribution of income, between short-term and long-term views.

It is, we believe, not just the priority that stands out, but an imperative one. The crisis looming at the horizon – only 15 years have passed since the last great recession – with all the signals it sends us (the overlapping current crises, stubborn inflation and market chaos) – requires “reordering society's priorities” (Khanna 2022). The political and even economic value of trust far exceeds the value of various economic indicators, no matter how important they might be. And trust cannot arise in the absence of a strategy facing tomorrow's challenges, to give cause for optimism and public support. In a visit to Bucharest, Jeffrey Sachs pointed out that „Every government should have an institution to look 20 years forward” (Sachs 2018, *ibid* Pâslaru 2018) This was a valid suggestion for any historical era. Now it has become pressing.

Given the interconnected nature of current crises, finding solutions should follow a whole-of-society approach, one that brings together policy makers, regulating bodies, industry representatives, and civil society representatives. The latter can support the design of a grand strategy at societal level, through a number of initiatives and contributions: (1) mapping potential crises and priorities for action

in their particular fields; (2) enhancing collaboration between different civil society organizations, in order to better understand the priorities of the whole and the interconnectivity of current crises. This can be done by creating multidisciplinary working groups or other types of temporary or permanent collaborative structures; (3) enhance the capacity for strategic projection by providing policy-makers with empirical evidence collected and shared in the aforementioned collaborative structures; (4) maintaining a constant dialogue with regular citizens on the interconnections between different thematic priorities for the development of the nation.

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THE CONTEMPORARY EUROPEAN SOCIAL DEMOCRACY: DOWNFALL AND RESILIENCE AS REFLECTED BY THE ROMANIAN (PSD) AND DUTCH (PvdA) CENTER-LEFT

Eugen Gabor

Introduction

■ Social democracy shaped the evolution of most Western European societies in the decades following WWII. When authoritarian regimes in Southern and Eastern Europe began to collapse (in the 1970s in the Mediterranean area, in 1989 in the Socialist bloc), the democratic left was a key player in the transition towards liberal democracy and market economy. Yet, at the turn of the century, the influence of the Social Democrats started to crumble. Nowadays, many parties that built welfare states in the West and post-authoritarian regimes in the South and East are on the verge of irrelevance.

Important studies are confirming the depth of this decline (Sassoon 2014; Mudge 2018). The center-left experienced dramatic electoral losses in the last 10–15 years in countries like France, Greece, Hungary, Great Britain, or Bulgaria. Although it managed to occupy the first position in the parliamentary elections held in September 2021, the German Social Democratic Party (SPD) is also significantly more vulnerable than two decades ago.

The crisis of European Social Democracy seemed to be milder in Scandinavia and in the southern part of the continent. However, recent developments suggest that the parties from these areas are less resilient than they appeared. The Swedish Social Democrats were unable to remain in power after the legislative elections held in September 2022 (Nilsson 2022). In Finland, their counterparts were outmaneuvered at the polls on April 2, 2023, both by the Conservatives and by the

populist right (Kirby 2023). In Spain, opinion polls are indicating that the Socialists are in danger of losing the parliamentary elections scheduled for the autumn of 2023 (Heller 2022).

One of the European center-left parties that suffered one of the most shocking downfalls is the Dutch Labour Party (PvdA). In 2012, PvdA was the second largest political party in the Netherlands; at the legislative elections, it obtained almost a quarter of the votes, being only narrowly defeated by the Liberal-Conservatives led by Prime Minister Mark Rutte. In 2021, the score of the Social Democrats was below 6% (Schaart 2021). On the other end of the continent, in Romania, the situation seems less grim. The Social Democratic Party (PSD) obtained the largest number of votes, on its own or as part of electoral alliances, at all the parliamentary elections since 2000. Moreover, PSD is, starting with November 2021, a member of the governing coalition, holding several important positions in the cabinet.

During the same storm, one party was shattered while the other seems unharmed. What are the reasons behind this difference? At the same time, PvdA continues to be highly influential at the level of the PES, while the international position of PSD is less secure. How can we explain this paradox? Is an analysis that focuses on these two groups relevant for understanding the causes of the crisis that is endangering the very existence of European Social Democracy? The role of the present paper is to put forwards some answers to these questions.

Theoretical and methodological considerations

Since the 1990s, the center-left parties from the EU countries went through a process of ideological transformation, moving towards the political center. This metamorphosis, which has its roots in political and economic evolutions from the 1970s and 1980s, was heavily enhanced by the theories of the British sociologist Anthony Giddens. Giddens argued that the survival of Social Democracy can be guaranteed by engaging in a third way that rejects both the neoliberal recipe of the right and the obsolete Marxist and Keynesian visions of the old left (Giddens 1998). His philosophy became a guideline for several leaders of the PES members, with the British Prime Minister Tony Blair and the German Chancellor Gerhard Schröder being the main advocates of Social Democracy's „divorce“ from its post-war path (Blair–Schröder 1998).

The establishment of a *Third Way* hegemony was followed by the global financial and economic crisis that started in 2007–2008, and by the expansion of the electoral and organizational crisis of the European Social Democracy. Is the democratic left slowly disintegrating in several EU countries because Giddens and Blair heavily altered the doctrinal foundation that characterized the 1945–1975 period? Is the recession the main factor behind the downfall we are analysing? The correlation is obvious in both cases, but, as every scientist must always keep in mind, correlation does not automatically imply the presence of causation.

The German political scientist Frank Bandau developed an overview of the academic explanations regarding the roots of the above-mentioned decline. According to him, we can identify four main categories: sociological, materialist, ideational, and institutional (Bandau 2022). *The sociological explanations* focus on the modification of the social structure. The post-industrial society is seen as the final point of the antagonism between the proletariat and the bourgeoisie. Nowadays, the working class, in the original sense of the term, is shrinking. This process is forcing the left to modify its discourse in order to attract voters from the middle class. One of the consequences of this approach, which is progressive from a cultural perspective, is the migration of voters from the precariat towards populist right-wing parties (Bandau 2022: 5).

The materialist explanations argue that Social Democracy is weakened by the convergence of three factors: globalisation, European integration, and the end of the Keynesian economic model. According to them, the compatibility between capitalism and Social Democracy reached its end in the 1970s (Bandau 2022: 6). Sporadic efforts to revive this relationship are usually blocked by European institutions (Lupițu 2020).

The ideational explanations consider that Social Democracy's downfall was triggered by its willingness to accept neoliberal policies. This process, which gained a theoretical background after the publication of Anthony Giddens' studies, altered the core values of the European left. Its new shape has been described as progressive neoliberalism (Bandau 2022: 7). The arguments of the representatives of this category suggest that a Social Democratic revival could be facilitated by an ideological strategy inspired by the abandoned Keynesian philosophy.

Finally, the *institutional explanations* highlight the organizational transformation of the center-left parties. The mass party model is being replaced by the cartel party model (Bandau 2022: 7). The historical relationship with the trade unions is severed, the Social Democrats losing their ability to mobilize the voters from the lower social categories. As noticed before (Ionescu 1999), the similarities between the left and the right are growing stronger as time goes by.

Our paper takes into account the four categories presented by Bandau in order to extract the relevant conclusions from the two analyzed cases. The methodological approach used by us is a qualitative one. We build a comparative historical analysis that focuses on recent evolutions regarding left-wing politics in two countries that, although quite similar in population, have different positions in the informal hierarchical structure of the EU.

PSD in the last decade: ideological ambiguity and electoral resilience

PSD is considered by many to be the *de facto* successor of the Romanian Communist Party (PCR) (Stan–Vancea 2017: 198; Ban 2014: 110). However, the party abandoned the Marxist-Leninist approach that characterized its past in the 1990's.

After some turbulence, at the beginning of the century, it was accepted as a member by the Socialist International (SI) and the PES. From an ideological point of view, PSD slowly accepted the Third Way model, overcoming the opposition of the group's founder, the former president of Romania Ion Iliescu.

Electorally, the Social Democrats had their ups and downs but nevertheless managed to retain their position in the front row of the Romanian political stage. In 2012, PSD participated in the parliamentary elections as a member of the Social Liberal Union (USL), which included one of the main Romanian right-wing structures, the National Liberal Party (PNL). This partnership, established first and foremost for tactical reasons, reflected the European left's reorientation toward the center. At this point, PSD was led by Victor Ponta, a jurist who stated that Tony Blair represents his political model. The policies he implemented as Prime Minister, between May 2012 and November 2015, were clearly influenced by Giddens' theories (Abraham 2017: 178).

At the polls, in December 2012, USL obtained 58.63% of the votes¹ (Badea 2012). Two years later, Victor Ponta was defeated in the second round of the presidential elections, in the aftermath of the disintegration of his coalition with the Liberals. Nevertheless, the electoral strength of the Social Democrats proved to be unaltered. In December 2016, PSD, this time without being part of an alliance, obtained a crushing victory at the legislative elections (45.47%) (Dobrescu 2016). Under the leadership of Liviu Dragnea, the party regained access to power. However, Dragnea's legal problems affected the effectiveness of PSD's policies.

Ideologically, PSD's new president distanced the party from the Third Way model preferred by some of his predecessors. He pivots towards an illiberal approach, characteristic of right-wing populists like Viktor Orbán (Păun 2018). Obviously, this action strained relations between PSD and PES and also had a consistent electoral impact. In May 2019, Dragnea was convicted in a case of abuse of office, and in the autumn of the same year, PSD's candidate was once again defeated in the second round of the presidential elections.

The current president of the Social Democrats, Marcel Ciolacu, seems to revive the era when Tony Blair's vision was a guideline for the PSD. Under his leadership, the party once again occupied the first place in the legislative elections, with a score of 28.9% (Stoica 2020). In November 2021, PSD returned to the cabinet, forming a coalition with PNL and with the political group that represents the Hungarian minority.

PSD's average score in the last three parliamentary elections (alone or as part of an alliance) is 44.3%. The situation is a bit different if we analyze the results of the Social Democrats in the elections for the European Parliament (EP). In 2014, the coalition led by Ponta was in the first place with a score of 37.6% (Parlamentul European 2014). Five years later, mainly because of the social tensions fueled by Dragnea's actions, PSD (22.5%) was defeated at the polls by PNL (27%). The average score of the Social Democrats at the last two European elections is 30.05%, which is 14% lower than the one registered at the legislative elections.

The profile of PSD's Members of the European Parliament (MEPs) is useful for better understanding the evolution of the Romanian Social Democrats. In 2014, PSD obtained 16 seats. The list included experienced politicians like Ioan Mircea Pașcu (former Minister of Defense) or Dan Nica (former Minister of Communications). Given their backgrounds, both are viewed by the public not just as politicians but also as experts, being partly associated with the field of technocrats. On the other hand, the list also included younger politicians, like Corina Crețu (former advisor to Ion Iliescu), Daciana Sârbu (adept of an ecologist version of Social Democracy), or Victor Negrescu (future minister in Social Democratic cabinets). Last but not least, another PSD MEP was Viorica Dăncilă, a politician without a clear ideological identity who later occupied the function of Prime Minister (2018–2019). The overview is unambiguous: the doctrinal image is eclectic, and the MEP positions are used both as a reward for experienced politicians and as a launching pad into internal politics for younger ones.

In 2019, the number of the PSD's MEPs was reduced to 9. Dan Nica and Victor Negrescu were once again in eligible positions, but otherwise, the Social Democratic list reflected the chaos that engulfed the party under Dragnea's leadership. It included a TV celebrity, a former priest, an MD, and a controversial representative of a smaller right-wing group.

Overall, the 2012–2022 period was fruitful for the Social Democrats, although they experienced moments of crisis. Economically, Victor Ponta often considered that protecting the interests of the business domain was more important than reducing social inequalities. In the interval when Dragnea was president of the PSD, neoliberal policy proposals regularly coexisted with Keynesian ones. Currently, PSD is arguing in favor of leftist reforms while accepting important components of PNL's neoliberal vision.

Culturally, the presence of a conservative component is a constant for the PSD. Perhaps here we have the biggest difference between the Romanian Social Democracy and the Western core of the PES. Victor Ponta, Liviu Dragnea, and Marcel Ciolacu have all rejected at least some elements of the postmaterialist progressive philosophy.

At the European level, the influence of PSD is limited. Corina Crețu occupied the position of European Commissioner for Cohesion and Reforms between 2014 and 2019, and currently, Victor Negrescu is vice president of the PES, but besides these aspects, the Social Democrats have almost no tools at their disposal for shaping European policies, although they have one of the most important center-left national groups in the EP. The cultural differences mentioned above have an important role in shaping this reality. Of course, we must also consider the fact that Romania is a part of EU's periphery both geographically and influence-wise.

It is difficult to put forward a conclusion regarding the crisis of European Social Democracy after analyzing the case of PSD, mainly because the party seems to have neutralized its effects efficiently. The image we are trying to present is poised to become more clear after introducing the Dutch case in the discussion.

PvdA in the last decade: progressive neoliberalism and electoral downfall

PvdA was founded in 1946. Initially, it included Social Democratic and right-wing currents. Gradually, it engaged exclusively on a left-wing path, preferring the Keynesian recipe that fueled post-war Western development. Starting with the 1950s, PvdA held an important role in the construction of the European Socialist family. Its representatives unsuccessfully argued in the 1960s in favor of creating a genuine European Progressive Party (Skrzypek 2013: 11).

In the 1980s, PvdA slowly begins to move ideologically towards the center. Initially, the Social Democrats preferred to build governing coalitions with the centrist Christian Democrats. In 1994, they modified their approach, establishing a partnership with the right-wing Liberal-Conservatives (VVD) (Keman 2008: 150).

From a cultural point of view, PvdA was (and still is) one of the most progressive European parties. During one of the cabinets led by the Social Democrats, in 2001, the Netherlands became the first country in the world to legalize gay marriages. PvdA is rejecting the conservative approach in a multitude of other areas (gender equality, abortion, etc.).

In 2012, the Social Democrats, whose electoral strength had been previously shaken by their new economic vision, occupied the second place in the parliamentary elections (24.84%²). The leader of VVD, Mark Rutte, formed a governing coalition with PvdA. We can notice that in 2012, both Romania and the Netherlands had Social-Liberal governments. In the Dutch cabinet, some of the main representatives of PvdA were Lodewijk Asscher (Deputy Prime Minister and Minister of Social Affairs), Frans Timmermans (Minister of Foreign Affairs), and Jeroen Dijsselbloem (Minister of Finance). Asscher was a psychologist whose father was a member of PVV. Timmermans was a diplomat who previously worked for the Dutch military intelligence structures. Dijsselbloem was one of the most aggressive supporters of neoliberal policies in regard with the Greek crisis, shocking many European politicians with his chauvinist remarks (Mehreen–McClean 2017).

Overall, the activity of the Social Democrats in the second Rutte cabinet (2012–2017), although occasionally having some Keynesian shades, proved that PvdA can be associated with the *progressive neoliberalism* concept. The electoral implications of this approach were clear: in the parliamentary elections held in March 2017, PvdA occupied the 7th place with a score of 5.7%. In 2021, the score of the Social Democrats was identical (Politico 2022).

PvdA's average score in the last three parliamentary elections is 12.08%, which is more than 32% lower than the same score of the PSD. The difference is a bit less striking if we analyze the European elections. In 2014, PvdA obtained 9.4% of the votes, a result that guaranteed three MEP seats. Although the Social Democrats were only in sixth place, they managed to impose Frans Timmermans as the First Vice-President of the European Commission, using in their favor the fact that they were part of the governing coalition. In 2019, in an evolution that surprised many analysts, PvdA occupied the first position in the European elections (19%),

obtaining six MEP seats. The average score of the Social Democrats at the last two European elections is 14.2%, which is slightly higher than the average score from the legislative elections but almost 16% lower than the same score of the PSD.

Regarding the profile of the PvdA MEPs in 2014, we have the following image: a 47-year-old economist (Paul Tang), a 54-year-old trade unionist with progressive cultural views (Agnes Jongerius), and a 35-year-old specialist in international relations, born and raised in Hungary (Kati Piri). We notice the gender diversity and the progressive neoliberal background mentioned above. In 2019, Tang, Jongerius, and Piri retained their seats.

PvdA's influence at the European level is significantly higher than the influence of the PSD, although, as we saw above, the Romanian Social Democrats had far superior electoral performances. Timmermans continues to be one of the most important leaders of the PES. The historical role of the Dutch left in building the European Socialist family is one of the reasons behind this anomaly. Obviously, the ideological compatibility between PvdA and the core of PES was also higher than PSD's ideological compatibility with Western Social Democracy.

Is the Dutch case relevant for understanding the causes of the European left's crisis? First of all, we observe that both the Romanian and Dutch societies were affected by a modification of the social structure in the last decades. Secondly, globalization, European integration, and the end of the Keynesian economic model impacted both countries. Thirdly, the Third Way ideological „revolution“ had effects on PvdA and PSD, but in the Romanian case, some of these effects were temporary. Fourthly, regarding the organizational model, indeed, both parties distanced themselves from the mass model. The elements presented in this paragraph are useful for suggesting answers to the questions presented in the first part of the paper.

Conclusions

Our overview casts a shadow of doubt on the sociological explanations. Romania is today far from the situation at the beginning of the 1990s, when it had a consistent working class. However, the left is, for the time being, not in danger of collapsing. The materialist explanations cannot be overlooked, but they are not sufficient for clarifying the origins of the difference we identified. Although to a smaller degree than in the Netherlands, Romania's current situation is also shaped by globalization and European integration. The ideational explanations are more helpful. PSD, although it continues to be ideologically ambiguous, never fully embraced Western progressive neoliberalism. The eclectic identity of the Romanian center-left, seems to be, for now, an electoral asset. Regarding the institutional explanations, once again we are confronted with question marks. PSD is also moving towards the cartel party model while having the characteristics of a catch-all party.

An important conclusion is that history matters. The Netherlands was one of the founders of the European project. Moreover, the Dutch model of consensus democracy (Lijphart 1999) influenced PvdA's ideological evolution. In Romania, the Social Democrats managed in the 1990s to build local structures that are essential to this day for their electoral resilience. Moreover, PSD managed to survive the grimmest years of the transition because Ion Iliescu preferred a social and economic recipe that had Keynesian elements.

Our conclusions are not definitive or exhaustive. Clearly, future studies could complete or modify them. A possible approach that would benefit a better understanding of the topic could include the expansion of the number of analyzed countries.

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Notes

¹ The Parliament of Romania is bicameral. In this study, we mention the results of the elections for its lower house (the Chamber of Deputies).

² Just like in the Romanian case, we are mentioning the results from the elections for the lower house of the Parliament.



Photo/Iván Halász



“AS LONG AS IT TAKES.” AN ANALYSIS OF THE DISCOURSE AND POLICIES OF THE BIDEN ADMINISTRATION DURING THE FIRST YEAR OF WAR IN UKRAINE

Iulia Huiu

Introduction

■ The geopolitical world has changed. The brutal invasion of the sovereign Ukraine by Russia and the war that ensued made this change obvious and brought it to a whole new level. As Richard Haas¹ put it, the world seems to be inside of “a perfect storm”. Even before the war in Ukraine, we witnessed the rise of authoritarianism and democratic backsliding globally, the re-emergence of old geopolitical risks of the great power competition, colliding with new ones like climate change or pandemics (Haas 2022: 26) . On February 24, 2022, Russia invaded Ukraine, starting thus a chain of events that are still unfolding. Where do they lead is still uncertain, however we can say with certainty this war has posed a threat to the international rule-based order, has challenged long held beliefs or policy positions, and has determined unprecedented actions. It has already re-shaped how states – Great Powers or not – view the international arena and assess threats, how they react and prepare, and it will most likely continue to shape national security strategies, foreign policy doctrines and political decisions.

This is a milestone geopolitical event, the kind of historical event there is no turning back from. There is already a world “before the war in Ukraine” and another one after. Fiona Hill, one of the most prestigious analysts and scholars specialized in Russia, was unequivocal in her evaluation on the war in Ukraine and its significance: “This is a great power conflict, the third power conflict in the European space in a little over a century...It’s the end of the existing world order. Our world is not going to be the same as it was before.” (Reynolds 2022).

On the flipside, before the war in Ukraine, NATO was in the process of redefining itself, after its purpose and even mere existence had been questioned by former US President. Now NATO is stronger and more united than ever, with Finland and Sweden making the unprecedented request to be part of the North-Atlantic Alliance. Before the war in Ukraine, there was a certain reluctance in expanding the military presence with troops on the ground on the Eastern Flank of NATO, despite the requests of Central and Eastern European countries. Now the United States and its allies had to reinforce their presence. Just to say the least.

When president Biden took office in January 2022, he proclaimed “America is back”, as an expression of the renewed US commitment to provide leadership in the international arena, and to restore strong relationships with its allies weakened by the Trump presidency. A year before his Inauguration, Joe Biden had published an oped in *Foreign Affairs* called “Why America Must Lead Again” in which he articulated his foreign policy vision. It was framed inside of the competition between democracy and autocracy and recognized the connection between foreign and domestic issues. Democracy was about to become one of the main, if not the most important theme, of the Biden presidency, both internally and in foreign relations. Combined with a commitment to ending “forever wars” and to building a foreign policy for the middle class, Biden’s approach was revealing the critical nature of the relationship between domestic politics and foreign policy. (Biden 2020). As his National Security Adviser Jake Sullivan put it during the transition “we’ve reached a point where foreign policy is domestic policy, and domestic policy is foreign policy...and the work that we do abroad fundamentally has to connect to making the lives of working people better, safer, fairer.” (Detrow 2020).

At the same time, Biden was vouching to bring America back at the table with allies and partners in tackling global challenges, and was promising America’s commitment for NATO was “sacred”. US needed to reestablish its credibility after Trump presidency had shattered long standing traditional relations, weakened America’s presence on the global stage through an isolationist approach (in which “America first” ended up meaning “America alone”) and even questioned the very existence of NATO. (Barnes–Cooper 2019).

“America is back” became the motto of a “Biden doctrine” that did not mean a return to the Obama-era policies, nor a simple reaction to correct or un-do Trump policies. Later on, words like “humility and confidence” (Montgomery 2022) were added to the mix to portray a foreign policy that implied both the need for a renewed American leadership and the acknowledgement that today’s challenges cannot be addressed, let alone resolved, but with allies and partners.

The idea we are at “an inflection point” that will define our future has been central to the Biden foreign policy, in connection to the fight for democracy. The war in Ukraine emphasized its validity. “We are in the midst of a fundamental debate about the future and direction of the world. We’re at an inflection point between those who argue that, given all the challenges we face...that autocracy is the best way forward,...and those who understand that democracy is essential

to meeting those challenges...I believe...that democracy will and must prevail.” President Biden spoke those words exactly a year before Russia invaded Ukraine (Remarks by President Biden at the 2021 Virtual Munich Security Conference 2021).

All of this was in the background when the war in Ukraine started. This larger political context has been relevant for shaping the foreign policy messaging, especially in the early stages of the war, and allows for a bigger understanding why some of the main themes were so pervasive in President’s Biden speeches from the beginning.

The purpose of this article is to analyze the directions of the US foreign policy in regard to Ukraine through the presidential discourse during the first year of war, thus identifying the main conversational threads, how they changed since the beginning of the war, and how they fit into the bigger political and foreign policy picture for the Biden administration.

The first chapter clarifies the methodological aspects, underlying the motivation for and the relevance of the discourse analysis as a significant qualitative research method in foreign policy. It includes a general description of speeches and remarks chosen for research. The second chapter has three main sections: an overall analysis of the presidential discourse, identifying the main themes around the war in Ukraine, assessing their significance, their connection with the evolution of the war, and the way they changed over time; a deeper insight into the two major foreign policy speeches delivered by President Biden in Warsaw, accompanied by a visual representation of their content; last but not least a summary of the policies and specific measures approved by the Biden administration, as an expression of how the messages translated into foreign policy decisions and actions.

The final chapter of this paper reviews the main conclusions of the discourse analysis, what they could mean for the future of US policy in regard to Ukraine and the region.

Methodology

Words matter in foreign policy. And when they come from the most powerful political tribune – the White House and the President of the United States – they matter the most. In foreign policy, words are not meant only to describe, explain or present, they are meant to create, shape realities, and set directions. They are not just a tool to react to past events, but rather one to project a future. This study is based on qualitative research and used discourse analysis as a research method. As Iver Neumann observes, “because a discourse maintains a degree of regularity in social relations, it produces preconditions of action. It constraints how the stuff that the world consists of is ordered, and so how people categorize and think about the world.” (Neumann 2008). The presidential discourse analysis is thus relevant for understanding the direction of US foreign policy and for anticipating a course of action.

For the current paper, I researched all the speeches and remarks regarding the war in Ukraine delivered directly by President Biden, as the source of US foreign policy in the matter. His speeches set the tone and the themes on how to communicate on the matter for all the other Department and US officials.

The most critical of them were President's Biden remarks on February 24, 2022 the first day of invasion; March 16, 2022 update from the White House; April 21 and 28, 2022 updates on Russia and Ukraine and request for funding from the White House; the May 3, 2022 visit at Lockheed Martin; the remarks before the meeting with President Zelenskyy and the White House press conference of the two presidents in December 2022; January 25, 2023 remarks at 11 months of war; President's Biden remarks in Kyiv; as well as the two major speeches delivered in Poland on March 26, 2022 and February 21, 2023. Because of their relevance for the general political climate, I also analyzed the State of the Union Address from 2022 and 2023, as well as one of the most critical campaign speeches from September 1, 2022 (titled "Battle for the Soul of our Nation"). I also monitored the read outs and statements on the phone calls with President of Ukraine Volodymyr Zelensky², as well as President Biden's remarks on the occasion of NATO, G7 and Bucharest 9 summits. (Madrid June 2022 NATO Summit, November 2022 Bali G7 Summit, February 2023 Poland Bucharest 9 Summit). I have not included in the research all the written statements and press releases of the White House press bureau. During this time President Biden has meet a significant number of foreign leaders individually or as part of multilateral formats. While a comprehensive review of all the meetings is beyond the scope of this study, a basic examination reveals a consistency of messaging.

Analyzing President's Biden discourse about the war in Ukraine

Before taking a deeper look at the main foreign policy speeches that defined US foreign policy in Ukraine during the last year, a few observations are required. When speaking on foreign policy matters President Biden had to address different audiences with their own concerns and expectations. He speaks simultaneously to Ukraine, to the countries in Central and Eastern Europe, to the Western allies, and to the adversaries. Sometimes he speaks directly to Putin, and in his major foreign policy speeches from Poland he also addressed directly the Russian people.

Besides setting a foreign policy directions, most of the speeches analyzed in this paper have an informational part as well: what the United States already did or will continue to do, announcing additional funding, military or humanitarian aid, new legislation, or requests to Congress.

Last but not least, President Biden needs to speak to the domestic audience. Even the messages apparently focused solely on foreign policy have the American public in the background. There is never a complete separation, as the conduct of foreign policy is dependent on maintaining both a strong bipartisan support

for Ukraine in Congress and public support. Maintaining unity at home, ensuring public support and explaining to the American audience why the war in Ukraine matters to the US were key to implementing foreign policy.

Main themes of the presidential foreign policy discourse regarding the war in Ukraine

One thing to notice from the beginning is the consistency of the main narratives coming from the White House throughout the first year of war. The same messages persisted through the entire analyzed period, with more or less emphasis depending on the particular context. Some messages have faded in the background, some organically evolved as the situation on the ground demanded, and new ones emerged naturally in response to new concerns. However, the overall line of messaging, the underlying narrative of the Biden administration has been consistent and clear, and it could be summarized as follows:

The war in Ukraine is a fight between democracy and autocracy, between freedom and repression. We are at an inflection point in history that will define the decades to come. US will defend every inch of NATO territory. US and its allies stand more united and stronger than ever in their commitment. Ukraine will never be a victory for Russia. Supporting Ukraine is an investment in freedom and democracy. If Russia stops, it will be the end of war, if Ukraine stops defending itself, it will be the end of Ukraine. US will support Ukraine to defend itself for as long as it takes.

Most of the speeches included both powerful statements articulating the overall foreign policy vision and framework, and specific policy measures and practical actions in support for Ukraine, such as announcing new funding or new military aid, expanding sanctions against Russia or taking other economic measures in response to the war circumstances.

The very first speech from the White House after the beginning of the invasion set the tone and most of the narratives for the months to come:

“As I made it clear, the United States will defend every inch of NATO territory with the full force of American power. And the good news is: NATO is more united and more determined than ever.” “There is no doubt – no doubt that the United States and every NATO Ally will meet our Article 5 commitments, which says that an attack on one is an attack on all.

“Liberty, democracy, human dignity – these are the forces far more powerful than fear and oppression. They cannot be extinguished by tyrants like Putin and his armies... And in the contest between democracy and autocracy, between sovereignty and subjugation, make no mistake: Freedom will prevail.” (Remarks by President Biden on Russia’s Unprovoked and Unjustified Attack on Ukraine, 2022).

On that occasion President Biden also announced \$650 million in defensive assistance for Ukraine, a set of sweeping sanctions against Russia, as well as the decision to send additional troops to Germany and Poland as part of the NATO commitment.

When the war started, the US administration had a couple of immediate objectives identifiable in the public discourse. One was to signal through messaging and to practically ensure the unity of action with its Western democratic allies, both in terms of military support to Ukraine, and in terms of sanctions and holding Russia accountable. The second objective was to reinforce US commitment for Article 5. Such message served both as a deterrence against Russia beyond Ukraine and as a reassurance for the NATO partners in Central and Eastern Europe, anxious at the expansionist ambitions of Russia. Thus, Biden administration was quick to settle any possible unease, left after the previous administration, in regard to America's commitment to Article 5. One other question president Biden took on resolving from the beginning was the extent and nature of the US involvement in Ukraine, through clarifying there would be no US troops on the ground engaging in a direct conflict with Russia.

The 2022 State of the Union address was scheduled just a couple of days after Russia initiated its invasion against Ukraine. On March 1, 2022, President Biden started his address in front of Congress with the war in Ukraine and reiterated the same narratives: unity of NATO response, the promise to defend every inch of NATO territory, US forces will not engage with Russian forces, and this is a battle between democracies and autocracies. (State of the Union Address 2022, 2022).³

After Ukraine was successful in avoiding a much feared and predicted rapid fall of Kyiv, it became clear the war was not going as Russia anticipated and a long battle was waiting ahead. Under these circumstances, two other narratives started to emerge in the presidential discourse: "Ukraine will never be a victory for Putin", and "This could be a long and difficult battle," said President Biden from the White House on March 16, 2022. (Remarks by President Biden on the Assistance the United States is Providing to Ukraine 2022)

As the war entered its second phase, the presidential discourse needed to address domestic concerns, stemming from the global consequences of war: inflation, high gas price, fear of an economic recession, the prospects of a tough winter. This coincided in the United States with the electoral campaign for the midterm elections. In this context two new critical narratives built upon the already existing ones: first responding to the criticism from the far-right that US tax payer money were provided to Ukraine while the every day life of Americans was impacted by inflation, and second challenging the onset of a "public fatigue" in regards to the war and the belief time was not on Ukraine side, but Putin's.

In May 2022, while visiting an Alabama facility of Lockheed Martin, one of the biggest companies in the domain of security, defense and technology, Joe Biden explained that the funding sent to Ukraine is an "investment in defending freedom and democracy", and Americans are contributing "to the case for freedom." (Remarks by President Biden on the Security Assistance to Ukraine, Lockheed Martin Pike County Operations 2022). Thanking Americans for their contribution to the war and acknowledging their effort has since become another critical feature of the presidential discourse.

Later on, at the end of June 2022, while attending the Madrid NATO Summit, Joe Biden was asked if the US support for Ukraine was “indefinite” or there would come a time when US could not support the war effort any longer. “We are going to support Ukraine as long as it takes,” responded President Biden. (Remarks by President Biden in Press Conference, Madrid, Spain 2022).

“As long as it takes” became, thus, the key phrase defining Biden administration policy in Ukraine, and has been constantly repeated including during President’s Zelenskyy visit to Washington, at the end of 2022, and during President’s Biden visit to Kyiv in February 2023. Not only did President Biden convey this message, but so did other members of the cabinet like Secretary of State Antony Blinken and Secretary of Treasury Janet Yellen. “I bring to Kyiv a clear message from President Biden and the American people: We will stand with Ukraine for as long as it takes,” said Secretary Yellen during a meeting with the President of Ukraine Volodymyr Zelenskyy at the end of February 2023. (Garrity 2023)

At the same time, the fight for democracy was one of the key presidential messages during the 2022 campaign. While the electoral message itself was focused on the domestic challenges and the need to protect and fight for the American democracy, this was very much in line with the messaging on the war in Ukraine, and the resolve shown by the Ukrainian people in defending their democracy.

Throughout the year, a few other foreign policy themes unfolded in the presidential discourse. Following up on his campaign messaging, Joe Biden continued to speak about the world being “at an inflection point” (Remarks by President Biden on the Security Assistance to Ukraine, Lockheed Martin Pike County Operations 2022). Later on, in October 2022, the entire National Security Strategy was coined inside this very idea: “our world is at an inflection point. How we respond to the tremendous challenges and the unprecedented opportunities we face today will determine the direction of our world and impact the security and prosperity of the American people for generations to come.” (National Security Strategy, October 12, 2022: 2)

One of the key unanswerable questions, permanently in the background but with no clear perspective in sight, has been “when will the war end” and consequently how. “If Russia stops it will be the end of war, if Ukraine stops defending itself it would be the end of Ukraine” became a major talking point, both in reaction to the push for some sort of compromise and to emphasize where the accountability lays. (Remarks by President Biden Ahead of the One-Year Anniversary of Russia’s Brutal and Unprovoked Invasion of Ukraine, Warsaw, Poland 2023). This narrative came also in response to the claims from Kremlin that the West was seeking “the strategic defeat of Russia”.

The concept of a “strategic defeat” – ambiguous in itself and susceptible of misinterpretation when taken out of context – has generated some debate in Washington. While Russia was experiencing defeat on the battleground (for example the battle of Kyiv) and had clearly underestimated both the Ukrainian resolve and the Western unity, the public official discourse avoided the concept of

“defeat”. “The United States and the nations of Europe do not seek to control or destroy Russia”, said President Biden in his speech from Poland ahead of the one-year anniversary, in response to Putin. “The West was not plotting to attack Russia, as Putin said today. President Putin chose this war. It’s simple. If Russia stopped invading Ukraine, it would end the war. If Ukraine stopped defending itself against Russia, it would be the end of Ukraine.” (Remarks by President Biden Ahead of the One-Year Anniversary of Russia’s Brutal and Unprovoked Invasion of Ukraine, Warsaw, Poland 2023)

In addition, Biden administration made clear it would not engage in any negotiation, and it was up to Ukraine to make any decision, so there would be “nothing about Ukraine without Ukraine.” (Remarks by President Biden in a Press Conference, Bali, Indonesia 2022).

Another recurring metaphoric message underlines NATO unity and strength, and the achievement of NATO expansion: “He (Putin) thought he was going to end up with the Finlandization of Europe. Well, he’s got the NATOization of Finland.” (Remarks by President Biden on Continued Support for Ukraine January 25, 2023)

Two Poland Speeches in the Mirror

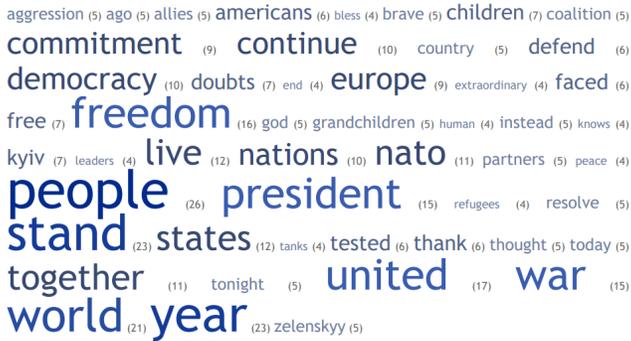
Two landmark foreign policy speeches were delivered by President Biden in Poland, one at on March 26, 2022 and one on February 21, 2023. Almost one year apart (at the beginning of the war and before the one-year anniversary), a deeper dive into the content of the two speeches reveals the common themes, as well as how the conversational focus has shifted during the first year of war.

The graphs below provide a visual account of the two speeches. The graphs were created with the TagCrowd software⁴, available online, and include the most frequently used 50 words. For practical purposes I removed the names Russia, Russian, Ukraine, Ukrainian, Poland and Putin.

Graph 1. – Visual representation of the most used words in the March 26, 2022 Speech by President Joe Biden, Warsaw, Poland. Numbers of uses in parentheses.



Graph 2. – Visual representation of the most used words in the February 21, 2023 Speech by President Joe Biden, Warsaw, Poland. Numbers of uses in parentheses.



Graph 3 – Comparison between the most used words in both speeches.

Words	March 26, 2022	February 21, 2023
	How often	How often
People	32	26
World	17	21
Democracy, democratic	19	10
Freedom, free	21	23
War	15	15
Nations	10	10
NATO	11	11
United, unity, together	9	28
Coalition, partners		10
Children	6	7
Fight	8	
Power	11	
Forces	11	
Sanctions	7	
Defend		6
Stand, commitment		32
Brave, resolve		10
Continue		10

The main theme of the first speech was “democracy”. In the second one the most powerful word was “freedom”, while “Ukraine will never be a victory for Russia” was a strong common thread for both. The comparison presented by Graph 3 is relevant for how some common themes were preserved or evolved. The idea of “unity”, expressed through multiple iterations (coalition, partners, together, allies) became the main feature of the second Warsaw speech, together with the commitment to continue to support Ukraine and the praise for the Ukrainian resolve. Some other issues of concern relevant to the beginning of the war (like sanctions, economy) were no longer addressed a year later, while new messages were used to portray where the war finds itself in February 2023 (“Ukraine stand, Kyiv stands).

US policies and support for Ukraine during the first year of war

Biden administration messages translated into an extensive set of policies ranging from military, humanitarian or energy security assistance, to imposing economic costs and extensive sanctions on Russia, building support at the UN and working in lockstep with the allies and partners.

According to the fact sheet provided by the White House on February 20, 2023, under the Biden administration, during the first year of war the US committed \$30.4 billion in security assistance for Ukraine, from which \$29.8 billion since the start of the war. This includes more than 8500 Javelins, over 1600 Stinger anti-aircraft system, 31 Abrams tanks, 45 T-72 tanks, 20 Mi-17 helicopters, 4000 Zuni aircraft rockets, 38 High Mobility Artillery Rocket Systems, 12 Avenger air defense system, millions of artillery rounds, one Patriot air defense battery and munitions, etc. (Fact Sheet on U.S. Security Assistance to Ukraine, February 20, 2023). On the humanitarian front, US provided more than \$1.9 billion to Ukrainians, welcomed 267,000 Ukrainian refugees and created Uniting for Ukraine program. US also provided \$340 million in refugee assistance to the European partners. (One Year Later: Helping Ukraine Win the War and Build Lasting Peace, February 2023).

On the energy security and economic assistance front, United States disbursed \$13 billion in grant financing for budget support for Ukraine, provided electricity equipment to restore the power system, and, among other measures, through the US-EU Task Force on Energy Security US ensured that Europe had enough gas for the winter (FACT SHEET: One Year of Supporting Ukraine, February 21 2023). On March 20, 2023, the administration announced sending additional \$350 million in military assistance, while Blinken emphasized the United States will continue to support Ukraine “for as long as it takes”. Overall, this leads up to \$32 billion in lethal aid provided by the US. (Mitchell 2023)

Support for civil society

Besides the critical military, USAID partnered with the civil society in Ukraine on numerous humanitarian relief endeavors, as well as on a wide range of initiatives from raising awareness on war crimes to promoting Ukrainian values and culture. Thus, with USAID’s support two coalitions of human rights organizations (Ukraine 5 am and the Tribunal for Putin) documented more than 25,000 instances of war crimes and human rights abuses. The Ukrainian Center for Civil Liberties, a human rights organization also supported by USAID, received the Nobel Peace Prize for documenting war crimes committed by Russia. During the first year of war, USAID expanded its Ukraine Confidence Building Initiative “to help Ukraine’s citizens, civil society, and government authorities address the impacts of Russia’s war and maintain unity around a European, democratic, sovereign Ukraine”. It also “implemented over 260 distinct activities across 23 regions of Ukraine, with a

substantial focus on arts and culture that exemplify Ukrainian values.” According to its report, USAID provided \$102 million for the European Democratic Resilience Initiative (EDRI), meant to empower free media, protect civil society and activists, combat disinformation, and enable the documentation of human rights violations. (USAID, February 2023, pp. 8,10,12).

Conclusions and evaluations

The analysis of President’s Biden foreign policy speeches on Ukraine during the first year of war confirms a consistency between pre- and post-February 2022 messages, as well as throughout the entire first year since the Russian invasion.

Democracy has been Joe Biden’s most prominent theme both as a presidential candidate and as President, the core concept both in domestic politics and foreign policy, before the war and moreover after February 2022. Framing the war in Ukraine in terms of democracy vs. autocracy has encountered some criticism from US realist scholars in international relations (Is U.S. Foreign Policy Trying to Do Too Much? A Conversation with Emma Ashford 2022), and some have considered that describing the war in terms of “sovereignty” could have provided a more “effective” framework. Nevertheless, “democracy” has remained a pillar of the presidential discourse, which matches the increasing relevance democracy has for the American public.⁵ While the second speech from Warsaw reveals an explicit increased focus on freedom and unity rather than democracy, the battle for democracy remains intrinsic to Biden’s foreign policy and domestic politics as well.

The analyzed speeches reveal the directions of the US foreign policy under the Biden administration in regard to Ukraine: a long-term commitment to support Ukraine defend itself against Russian aggression, framing the war inside of the bigger fight between democracy and autocracy, ensuring NATO unity and working in partnership with the allies. As time went by, President Biden had to continuously address both foreign and domestic concerns, including explaining why the support for Ukraine is in the national interest of the US and acknowledging the contribution of the American people and cost.

These messages were reinforced not only through the policies of the US administration, but through other political and symbolic actions. President Biden visited Ukraine at the one-year anniversary and visited Poland twice, which reflects the importance of Central and Eastern Europe under the current geopolitical context.

Given the consistency of the messages and actions so far, we can anticipate at this point that the Biden administration will continue with the same foreign policy directions and an unwavering support for Ukraine.

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Notes

- ¹ Richard Haas is a well-known diplomat and specialist in international relations. President of the prestigious US think tank Council on Foreign Relations.
- ² Readouts and statements on calls with President Zelenskyy – October 10, October 4, Aug 25, June 15, April 13, March 30, March 11, March 5, Mar 1, Feb 24, Feb 21.

³ For further reference, these are exact messages from the 2022 State of the Union: “(Putin) thought the West and NATO wouldn’t respond. He thought he could divide us at home, in this chamber, in this nation. He thought he could divide us in Europe as well. But Putin was wrong. We are ready. We are united. And that’s what we did: We stayed united.” “But let me be clear: Our forces are not engaged and will not engage in the conflict with Russian forces in Ukraine. Our forces are not going to Europe to fight [in] Ukraine but to defend our NATO Allies in the event that Putin decides to keep moving west.” “And as I’ve made crystal clear, the United States and our Allies will defend every inch of territory that is NATO territory with the full force of our collective power – every single inch.” “In the battle between democracy and autocracies, democracies are rising to the moment and the world is clearly choosing the side of peace and security.”

⁴ <https://tagcrowd.com/>

⁵ The future of democracy was a significant issue for the American voters during the November 2022 midterm elections. A Pew Research poll from October 2022 indicated that 70% of the voters considered the future of democracy important for their vote. <https://www.pewresearch.org/politics/2022/10/20/the-midterm-elections-and-views-of-biden/>



Photo/Iván Halász

THE THE ELECTORAL PROCESS IN BULGARIA: CURRENT PROBLEMS AND NECESSARY CHANGES IN THE LIGHT OF INTERNATIONAL STANDARDS FOR FAIR AND DEMOCRATIC ELECTIONS

Kashukeeva-Nusheva Vanya

Introduction

■ The problems related to the integrity of the electoral process in Bulgaria occupy a central place in the public discussion from the beginning of the democratic changes in the 90's of the 20th century until today. During this period, the elections were monitored by a few Bulgarian and international organizations, representatives of the academic community and experts on the electoral process (OSCE 2014, 2017, 2021, 2023; TI-Bulgaria 2014, 2015, 2017, 2021, 2022; Kashukeeva-Nusheva and Slavov 2021), whose studies highlight the main deficits in the conduct of elections in the country. These deficits are expressed in several main directions: 1) unsustainable legislation that is a subject of amendments immediately before elections and is not the result of a broad discussion involving all interested parties and the expert community; 2) problems in the administration of the electoral process as a function of insufficiently good training of the section election commissions and politically biased motivated decisions of the Central Electoral Commission; 3) voter registration and the manner in which voter lists are drawn up; 4) ineffective control over the implementation of the election campaign financing rules; changes in the rules that do not comply with the international standards; 5) conditions for media coverage in the public media, which create prerequisites for a distorted implementation of the principle of pluralism and equal access; 6) violations of citizens' electoral rights, expressed in vote buying, corporate vote and pressure on voters.

This present analysis examines in detail the issue of a fragile legislative framework that changes immediately before the elections. The reason for focusing the attention on this problem is that it is a source of a substantial part of the deficits in the electoral process.

Council of Europe and OSCE standards on sustainability of the legal framework in the electoral process

The international standards on the legal framework of the electoral process were developed in the 1990s by leading pan-European organizations, among which Council of Europe (CE, through its advisory body the Venice Commission) and the Organization for Security and Cooperation in Europe (OSCE, through the Office on democratic institutions and human rights) occupy leadership positions. These standards express the understanding that rules regarding the preparation and conduct of elections are the foundation upon which the entire electoral process is built. Adequately created norms set the framework of rights and obligations of all participants, and their observance should create trust in the institutions of representative democracy.

In this regard, several key documents should be noted that create the basis of standards regarding the democratic electoral process: „Code of Good Practices in Electoral Matters“ (Council of Europe/Venice Commission 2002), adopted by OSCE; „ Handbook for the Observation of Voter Registration“ (OSCE/ODIHR 2012); „Guidelines for Reviewing a Legal Framework for Elections“ (OSCE/ODIHR 2013); „Handbook for the Observation of New Voting Technologies“ (OSCE/ODIHR 2013); „Handbook on Media Monitoring for Election Observation Missions“ (OSCE/ODIHR 2012); „Guidelines on Political Party Regulation“ (Venice Commission/ OSCE/ODIHR 2020), OSCE/ODIHR (2021); „Handbook for the Observation of Election Campaigns and Political Environments“ (OSCE/ODIHR 2021).

„Code of Good Practices in Electoral Matters“ defines requirements in two key directions: a) rules of the electoral law must have at least the rank of a statute; they should be written in the constitution or at a level higher than ordinary law; and b) the fundamental elements of electoral law, such as electoral system, membership of electoral commissions and constituency boundaries, should not be amended less than one year before an elections“ (Venice Commission 2002: 10).

A detailed examination of the document allows to discover the essential motives regarding the standard of stability and predictability of the electoral legislation. They are defined in paragraphs § 63–67 (Venice Commission 2002: 26). First of all, the stability of legislation is crucial for confidence in the electoral process, which is itself vital to the consolidation of democracy. In this regard, the Venice Commission emphasizes that the rules, which are amended frequently, can confuse voters and provoke their mistrust: „63. Rules which change frequently – and especially rules which are complicated – may confuse voters. Above all, voters

may conclude, rightly or wrongly, that electoral law is simply a tool in the hands of the powerful, and that their own votes have little weight in deciding the results of elections.”

Another important document of the OSCE – „Guidelines for Reviewing a Legal Framework for Elections” (OSCE/ODIHR 2013: 11), also formulates recommendations on the need for timely adoption of amendment in the electoral legislation. The main motives are expressed in two directions: a) the need for the political parties and institutions to be adequately informed about the rules, which may allow them to take timely measures to implement the law; b) avoiding the risks of increasing mistrust in the electoral process:

„Electoral legislation should be enacted sufficiently in advance of elections to enable voters and all participants in the process – including election-administration bodies, candidates, parties and the media – to become informed of the rules. Electoral legislation enacted at the „last minute” has the potential to undermine trust in the process and diminish the opportunity for political participants and voters to become familiar with the rules of the electoral process in a timely manner.”

Implementation of the standard in Bulgaria

From the beginning of the democratic changes in Bulgaria until now, two approaches have been applied in defining the rules for conducting elections: 1) separate laws for each type of elections (from 1991 to 2011) and 2) election codes that define a general universal framework for the electoral process. The first Electoral Code was adopted in 2011 and was in force for only three years – until 2014. The elections held in 2013 showed significant deficiencies of this law and served as an argument for drafting of an entirely new electoral code.

The current Electoral Code was adopted by the 42nd National Assembly and entered into force on March 5, 2021. From 2014 to the present moment, it has been amended 25 times, with only 2 times the law was amended within a period that is longer than 6 months before the elections (in accordance with CE and OSCE standards), and 23 times the amendments were made immediately before the elections (*see Table 1*).

Table 1. Frequency of amendments to the Electoral Code immediately before elections (2014–2023)

Election date	Amendments made in a period less than 6 months before the elections	Amendments made in a period longer than 6 months before an election
Elections for Members of the European Parliament (European elections) – 25 May 2014	– Electoral Code adopted on 5 March 2014 – 22 April 2014	
Parliamentary elections – 5 October 5 2014	– 27 June 2014	
Local elections – 25 October 2015	– 28 November 2014 – 13 October 2015	
Presidential elections – 6 November 2016	– 26 May 2016 – 22 July 2016 – 28 October 2016	
Parliamentary elections – 26 March 2017	– 6 December 2016 – 7 March 2017	
Elections for Members of the European Parliament (European elections) – 26 May 2019	– 11 December 2018 – 26 February 2019 – 12 March 2019 – 8 April 2019 – 23 April 2019	– 24 Октомври 2017 – 13 Ноември 2018
Local elections – 27 October 2019	– 30 July 2019 – 2 August 2019	
Parliamentary elections – 4 April 2021	– 13 October 2020 – 18 December 2020	
Parliamentary elections – 11 юли 2021	– 1 May 2021 – 7 May 2021	
Parliamentary elections and Presidential elections – 14 November 2021	– 13 July 2021	
Parliamentary elections – 2 October 2022	– 22 February 2022	
Parliamentary elections – 2 April 2023	– 30 December 2022	

The presented data unequivocally show that the approach of making amendments in electoral legislation immediately before elections has been applied by all legislatures functioning since 2014. This method has been critically evaluated by the international observation missions of PACE and OSCE. In the joint opinion of the PACE/Venice Commission/OSCE/ODIHR (Venice Commission/OSCE/ODIHR 2017: 5) the problem regarding the frequent amendments in the Electoral Code and its

negative impact on the electoral process is explicitly stated:

„5. Amendments to the Electoral Code were passed on three occasions in 2014 (22 April, 27 June and 28 November), on one occasion in 2015 (1 November) and on three occasions in 2016 (26 May, 22 July and 28 October). They are comprehensive and affect around 1/4 of the provisions in the Electoral Code. (...)

17. The stability of the electoral law is a prerequisite for implementing the principles underlying Europe's electoral heritage and is vital to the credibility of an electoral process. To this effect, the Venice Commission's Code of Good Practice in Electoral Matters states that "fundamental elements of electoral law, in particular the electoral system proper, membership of electoral commissions and the drawing of constituency boundaries, should not be open to amendment less than one year before an election". "Stability is particularly important regarding the fundamental elements of the electoral law since these aspects are more likely to influence the outcome of an election."

Making hasty and controversial amendments in the electoral law has also been criticized by the political parties that are in opposition. The paradox is that at the moment when some parties form a parliamentary majority, they adopt the same approach – changing the rules without a broad public discussion, without an independent and thorough analysis of the deficits and in an extremely short period immediately before the elections.

The instability of the electoral legislation is one of the essential accents in the critical assessments of Bulgarian non-governmental organizations and a few researchers of political life in the country (Kashukeeva-Nusheva-Slavov 2021: 102). In this regard, the positions and monitoring reports of Transparency International-Bulgaria (TI-Bulgaria 2014, 2015, 2017, 2022) and the organizations that are members of the Public Council of the CEC¹ should be highlighted.

The analyses of TI-Bulgaria highlight deficiencies regarding the implementation of the standard of stability and predictability of the electoral legislation in three main directions. First, a special subject to critical evaluation are the procedures by which the electoral legislation is amended. In this regard, the organization emphasizes that essential rules are amended in a period that is less than 6 months before the elections and this creates a high degree of unpredictability both for the participants in the elections and for the election administration.²

On a second place, the subject of critics is the substantive aspect of the proposed legal amendments. They are usually carried out without analysis of the causes of the identified deficits in the electoral process, without a preliminary assessment of potential risks and consequences, as well as without considering the recommendations of national organizations, international organizations, and experts. In this regard, in November 2022, TI-Bulgaria expressed the following position in the 48th National Assembly (TI-Bulgaria 2022):

„Transparency International-Bulgaria assesses as unacceptable the manner in which amendments in the electoral legislation are proposed. Some of the proposed amendments do not adequately assess the risks in the electoral process, un-

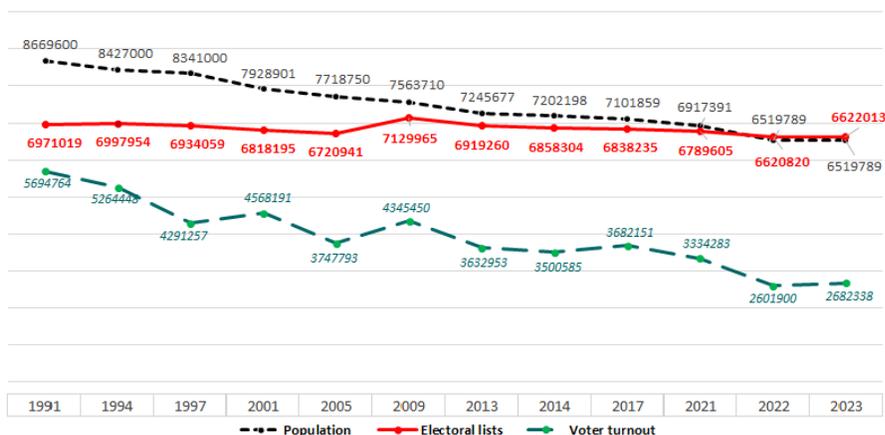
dermine trust in the electoral process and generally do not express a clear concept of its conduct. Once again, we emphasize that amendments in the electoral legislation must be carried out in a calm political environment, based on a thorough expert analysis of the important problems in the electoral process and in accordance with the standards of the international organizations. Instead of discussing the essential deficits, we are witnessing a competition between political parties to propose „piecemeal“ changes that represent a retreat from the achievements of the electoral process.” (TI-Bulgaria 2022).

The essential consequences of the approach described are expressed both in the creation of serious difficulties for the parties and for the institutions organizing elections in the country, as well as in the undermining of voters' trust. In this regard, the Bulgarian political process is in „Paragraph 22“ – on the one hand, the low level of trust in political life leads to a decrease in the willingness of voters to vote, and on the other hand, low voter turnout leads to a further decrease in trust in political parties and institutions, and in general – a mistrust in representative democracy. This negative trend is also the subject of the analyses of a number of Bulgarian researchers. For example, in her analysis of distrust trends in politics, Teodora Kaleynska (Kaleynska 2016: 280) emphasizes the following:

„In Bulgarian society the level of mistrust towards politics, political parties and politicians is sustainable high and is critical to the level of political participation. Despite the fact that these were the longest and most massive demonstrations, although several people committed suicide and burned themselves as a sign of protest to the existing economic conditions and political corruption and protocol political games, the majority of the voters didn't vote. In the early parliamentary elections in May 2013 only 51.33% of the voters exercised their voting rights, in the early parliamentary elections in October 2014 – the turnout dropped to 48.66%. The fact that less than half of the Bulgarian society avoided from the voting exercise might be in perspective serious threat to democratic development.“

In compliance of the assessment of a mutual relationship between the frequent and contradictory amendments in the electoral legislation and the decreasing trust in the electoral process could be mentioned the current data on the decreasing voter turnout. For example, the voter turnout in the early parliamentary elections held on October 2, 2022 was 39.41%, and in the early parliamentary elections held on April 2, 2023, it was 40.69%. This value reflects a long-term trend of decreasing voter turnout, which is also indicative of the trend of decreasing trust in political institutions (*see Figure 1*).

Fig 1. Number of voters in Bulgaria (trends in the period 1991–2023)³



The third direction of incompliance with the international standards is found in the exclusionary approach of the legislative process. In this regard, the main object of criticism is the refusal to seek consensus between the main political parties and the neglect of the recommendations of national and international organizations, as well as experts in this field. A general rule of discussions in parliamentary committees is the formal observance of the rules of the consultative process; party discipline prevails over expert assessments; the opinions of observational organizations are not considered, and their representatives are given the opportunity to present their arguments within 3–5 minutes. An identical approach was demonstrated during the discussion of the latest amendments to the Election Code in the period November – December 2022. Within the discussion in the parliamentary committee, the opinion of the opposition representatives was not considered, and the representatives of Bulgarian non-governmental organizations were given the opportunity to express their opinions only after the urgent requests of opposition representatives; the hearing of representatives of the Central Election Commission was also not allowed.⁴ In this regard, it is appropriate to note that the amendments in the Electoral Code referred to essential technological issues: simultaneous voting with paper ballots and with electronic machines in the sections, removing the electronic memory from the electronic machines and turning them into printers of a second type of paper ballots, replacing the dark voting rooms with privacy screens; introduction of video surveillance during the counting of ballots.

The highly formalized and exclusive approach to making amendments to the electoral legislation has repeatedly been criticized by international observer missions of the OSCE and PACE. In this regard should be mentioned both the monitoring reports and joint opinions regarding the amendments to the Electoral Code. For example, the Joint opinion of the Venice Commission/OSCE/ODIHR (Venice Commission/OSCE /ODIHR 2017: 4–5), along with the finding regarding the series of amendments in the law, highlights the following critical assessment:

„12. ... Ensuring a broad public consultation process, which is necessary to encourage public trust and confidence in electoral legislation and processes“ (...)

„15. As a preliminary remark, it should be noted that successful electoral reform should be built on at least the following three elements: 1) clear and comprehensive legislation that meets international obligations and standards and addresses prior recommendations; 2) adoption of legislation by broad consensus after extensive public consultations with all relevant stakeholders 3) political commitment to fully implement the electoral legislation in good faith.“

The OSCE monitoring report on the elections of 4 April 2021 (OSCE 2021: 29) also emphasizes the importance of sustainable legislation, recommending the following: „A. PRIORITY RECOMMENDATIONS. 1. To ensure a coherent and stable electoral framework, the legislation should be reviewed to bring it further in line with OSCE commitments, international standards and good practices, well in advance of the next election period and within an inclusive and transparent consultation process.“

Conclusions

The comparative analysis of the documents of the Council of Europe, OSCE and the reports of the monitoring organizations regarding the electoral process in Bulgaria gives grounds for the conclusion that the standards of sustainability and predictability of the electoral legislation are not effectively applied in Bulgaria. There is a discrepancy in four main directions: 1) frequent amendments, which, as a rule, take place immediately before elections; 2) lack of motives regarding the proposed amendments; contradictory and fragmented rules; 3) lack of an independent in-depth analysis of the correspondence between identified deficits in the electoral process, proposed amendments and impact assessment of the proposed rules; 4) a formal consultative process that is not based on broad participation of interested participants in the electoral process, institutions, experts and observers.

The identified deficits lead to the conclusion that a significant change is needed in the approach by which amendments in electoral legislation are carried out. In this regard, the amendments to the electoral legislation should be carried out considering two prerequisites. First, it is necessary for the amendments to be carried out based on a consultative process that includes civil society structures, considering their arguments and proposals. Secondly, to avoid political dividends for the parties that accept the legal changes, the new provisions should enter into force not for the upcoming, but for the next elections.

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Notes

¹ The Public Council of the CEC is a legal figure provided under the Electoral Code, which aims to create a transparent mechanism of consultative process between the electoral administration and non-governmental organizations that monitor elections and express readiness to participate in such a formalized dialogue.

² See section News regarding positions on the new Election code, published on 12 and 13 December 2013, available at: <http://transparency.bg/news>.

³ Sources: Central Election Commission: www.cik.bg, National Statistical Institute: www.nsi.bg.

⁴ See Transcript of the meeting of the Committee on Legal Affairs held on 16 November 2022, available at: <https://www.parliament.bg/bg/parliamentarycommittees/3146/steno/7034>.



Photo/Iván Halász



DIGITAL TERRITORIES

CONFLICTS, ACTORS AND POWER IN THE RELATIONAL SPACE OF THE METAVERSE

Daniela La Foresta–Vittorio Amato

■ The world of Information and Communication Technologies

■ The ICT world has provided the connective tissue on which ideas, capital and innovations travel, playing the role of a strategic infrastructure in the globalisation process. The diffusion of ICT has, in fact, first favoured and then accelerated the birth of a system in which the production and sale of goods are, basically, less and less tied to the territory and more and more tied to the telematic integration of workers and consumers (Amato 2012).

In this context, inequalities of income, geographic origin, ethnicity, age, gender and residence, inherited from previous stages of development, play a crucial role in delineating a new geography between those who have access to the opportunities and resources offered by the new technologies and those who do not. Around these variables, considered by many to be irrelevant due to the processes of dematerialisation of production and the emergence of networked “collective intelligence”, a digital divide has developed that, although in recent years it seems to be softening, runs the risk of persisting for decades in many geographical areas. In particular, the drift separating the technology-rich continents from the poor ones could further aggravate the conditions of the latter, leading any bridges that have been painstakingly built to collapse in a very short time.

Some scholars have highlighted a cultural poverty that nullifies the potential of the tools acquired, despite a narrowing of the gap in Internet access that separated the different social groups: the lack of a good education implies discouraging

results in the use of the Net. In fact, in order to obtain useful information, it is necessary not only to know how to surf the web but also to know how hardware and software work and to possess a personal wealth of knowledge to interpret data, an issue that is even more cogent in the current technological scenario marked by the use of AI, the Metaverse and related 3D viewers.

Otherwise, one runs the risk of becoming a passive consumer of information distributed according to a pyramidal and hierarchical 'one-to-all' model reminiscent of television. Lack of skills, however, is not the only risk: the gap between those who have a computer and an Internet connection and those who do not, which is increasingly narrowing in developed countries, persists in many depressed areas of the world. For these reasons, the geography of info-poverty is extremely articulated and complex, far beyond the traditional macro-regional subdivision into which wealth and poverty categories are distributed. The significant connectivity challenge for developing countries is being alleviated to some extent thanks to increased access to mobile telephony. As is well known, fixed telephony requires huge investments, often beyond the means of developing countries, while mobile phone networks require considerably less investment, making mobile phones an affordable commodity for many people. What makes this trend particularly interesting is that the mobile phone is rapidly becoming the main access point to the web and digital communications for many people: mobile access to the Internet is becoming more and more popular due to lower costs, both due to the introduction of new technologies and because costs tend to decrease as volumes increase. This trend therefore helps to narrow the digital divide between developing and developed countries.

The information and communication technology sector has become a driving force for the economies of industrialised nations, and the increasing spread of these technologies is bringing about major changes in the organisation and production methods of numerous activities, significantly influencing the behaviour of economic agents also from the point of view of territorial spillovers. The ability to produce, assimilate and utilise ICT technologies has become a crucial competitiveness factor for economies in the modern world.

The rhetoric surrounding the Internet has often argued for the transcendence of technology over geography, claiming that every place and individual would be connected in a perfect virtual world (Cairncross 2022; Negroponte 1995). Others, then, in harmony with the neoclassical assumption of perfect access to information and the lowering of barriers to trade, argued that the Internet would configure an era of perfect competition, in which each individual, through the power of the ubiquitous information conveyed by the network, would be able to develop his or her potential (Kelly 1998). However, these assumptions do not correspond to reality since the Internet constantly creates differentiations between places and people, generating virtual spaces that differ from one another (Warf 2001). Therefore, a global, ubiquitous and uniform digital geography turns out to be a pure rhetorical exercise rather than reality.

Many scholars have mistakenly described the Internet as an environment without rules, which would have been one of its key success factors, instead, in order to guarantee an adequate level of compatibility and universality of access, the need for more regulatory intervention is now evident. It can therefore be said that from the point of view of technological geography, the Internet has a global reach, but is territorially uneven and hierarchical in terms of capacity and still insufficiently regulated.

Finally, the latest frontier of Artificial Intelligence opens up fascinating but also disturbing scenarios of knowledge, with regard to ethical and security profiles, as is well demonstrated by an answer in this sense generated by the AI Chat Gpt1: 'at the moment, the current state of the art in artificial intelligence does not allow machines to develop emotions or acquire humanoid sensations, since our programming is based on logic and data processing. However, research in the field of artificial intelligence is constantly evolving and increasingly sophisticated machine learning techniques are being developed. It may be possible in the future to develop artificial intelligence systems that can learn from experiences and develop some form of 'sentience' or 'emotions'. However, this also raises important ethical and security issues, which require careful and thoughtful consideration.

The Metaverse

In recent years, the word Metaverse has increasingly entered the lexicon of industry insiders and technology enthusiasts alike, meaning a shared three-dimensional virtual space in which users can interact with each other and with digital objects in a simulated digital environment in a fully immersive manner.

This new technological frontier is no longer a mere set of interconnected web pages, but rather an evolving virtual world in which users can enter and interact both with each other and with digital objects in real time. The etymology of the word², modelled on the English metaverse, formed from the prefix meta, meaning 'with, behind, beyond, after' and the noun (uni)verse 'universe' well describes the new technological paradigm.

It also opens up new spaces for economic growth as the new technology offers the possibility of creating innovative forms of participation and consumption: users can create their own virtual businesses, sell products and services and participate in a fully digital economy. People can enjoy highly realistic experiences such as attending virtual concerts, visiting museums and art galleries, shopping in a virtual shop, using health care, working, attending meetings, not to mention endless possibilities for games and e-sports. Learning and discovery are also about to be revolutionised, people will be able to learn no longer by passively absorbing information, but directly in the field, immersing themselves in completely new experiences within 3D environments³ (exploring space, operating with an open heart or simply learning to play paddle or embroidery...).

A new world is therefore also emerging for employment: on the one hand, new specialised jobs are being created, especially in the ICT and e-commerce sectors; on the other hand, already with the advent of remote working and then increasing automation, it has happened that many jobs have quickly become obsolete. But, as is well known, the cycle of job destruction and creation is conceptually the same in all industrial and technological revolutions.

The Metaverse also presents several risks and critical issues that must be considered, as is the case with any new technology: data security and user privacy are even more crucial precisely because of the infinite possibilities of interaction between people and with digital objects. It is a much more vulnerable environment than real life, where cybercriminals and hackers may have more opportunities to act. Equally sensitive is the issue of the collection of personal data and the use that companies might make of them, and thus the need to be able to guarantee the protection of sensitive information and data. A bit like what happened in the early years of the Internet, the regulation of the Metaverse is still ill-defined, nor is it clear who owns the rights to the virtual worlds created and how conflicts between users should be handled, issues that could generate problems of ownership of digital spaces and the sovereignty of States.

Virtual reality could create new inequalities and become a battleground between major global players: the large multinational technology corporations, which currently dominate the sector, could use their power to influence the global economy and world politics, creating unprecedented forms of inequality through an even more exclusive and elitist environment than in real life, where only a few people with access to the necessary knowledge, technology and resources can participate. There is also the possibility that people may lose contact with the real world and human relationships by preferring to spend most of their time in a virtual earthly paradise instead of in an anonymous and boring real life.

On the one hand, there is a unique opportunity for mankind, which, following its innate nature, will be able to create, explore and colonise a new virtual universe, an environment in which people can express themselves in ways that have never been possible before; at the same time, there are obvious risks and concerns that must be addressed with the goal of ensuring a safe, fair and inclusive environment for all. It will be interesting to observe how the Metaverse will develop in the coming years and how humanity will coexist and adapt to this new virtual reality.

Actors

As is well known, the Metaverse technology is still at an early stage harbouring immense developments, even ones that are difficult to imagine.

In the promised land of digital territories, traditional actors are overlapped and joined by new powers and more dynamic forces that compete to occupy spaces neglected by states and contribute to drawing a renewed geography of power.

The traditionally understood statehood has been joined by that of the technology giants that, with states, share many constituent elements, such as control over population, resources or powers and rights. These multinationals, personified and at times immortalised in the collective imagination by their visionary leaders, through their governance of the online data and commodities market, as well as of the physical infrastructures that represent the scaffolding of the digital territories, can impose choices and direct behaviour with potentially disruptive effects on the economy and society. The power gained through so-called surveillance capitalism (Zuboff 2019) is accompanied by the power based on the trust factor associated with the idea of progress, innovation and democratically diffused well-being that the digital narrative promotes and disseminates, and the strong ideological support of cultural and moral matrixes that derives from it. The dystopian corollary is that of a 'functional' sovereignty of these technocratic realities with inevitable consequences, also of a geopolitical nature, in relations with other States, even within international fora.

Hence, the new digital frontier is populated by the large multinational technology companies, which are developing virtual worlds with very different characteristics, purposes and technologies: just to name a few, Amazon, Google, Meta⁴, Microsoft, Nvidia, Second Life, and Spatial are investing massive resources and means, developing immersive technologies such as virtual and augmented reality, advanced 3D graphics, optical viewers and interactive virtual environment simulation.

In particular, Meta announced that it wants to become a 'metaverse company', i.e. a company that develops a virtual universe where people can meet, socialise, work, shop and participate in virtual immersive experiences. At this stage, the company is investing in virtual and augmented reality technologies, such as the Ray-Ban Stories and Oculus Quest 2 smart glasses, to enable users to interact in virtual environments and enhance the user experience. The company has also created a new dedicated product team, led directly by CEO Mark Zuckerberg, saying it will invest more than \$1 billion in development. Meta is focusing on a responsible building model that ensures safe and secure experiences with four priorities: 1. Economic opportunity (allowing people to choose, ensuring a dynamic digital economy); 2. Privacy (ensuring transparency and control of products); 3. Security and integrity (protecting people on platforms and providing them with the tools to take action or seek help in case of unpleasant experiences); 4. Equity and inclusion (ensuring that technologies are designed in an inclusive and accessible manner. The stated goal is to 'ensure an open and interoperable metaverse: just like the internet today, the metaverse will be a constellation of technologies, platforms and products. It will not be created, managed or controlled by a single company or institution'.⁵

Amazon has launched Amazon Sumerian, a development platform aimed at creating virtual, augmented and mixed reality experiences. In particular, the platform, true to its core business, is specifically exploring the use of the Metaverse as a way for users to shop online in an increasingly immersive and immersive manner.

Google's approach to the subject is different, as it is working on a virtual reality platform called Daydream that includes a wide range of applications and games. The search engine, also in order to defend its leadership potentially threatened by this digital revolution, has acquired Owlchemy Labs, a developer of virtual reality games.

Microsoft is investing in mixed reality through its HoloLens device, which allows users to interact with virtual objects in the real world. The company is also aiming to position itself in the new *metasocial* world harbinger of great developments and, to this end, has acquired AltspaceVR, a virtual reality socialisation platform.

Nvidia, a company that focuses on the production of graphics cards and parallel processing solutions, has shown a strong interest in the metaverse. The company has developed advanced rendering technologies such as *real-time ray tracing* and the Omniverse platform, which allows artists, designers and engineers to collaborate on 3D modelling programmes and real-time simulations, especially aimed at design, architecture, entertainment and education. The company also launched its first virtual reality glasses, called Nvidia Omniverse Holodeck, which allow users to explore virtual environments in a fully immersive way.

One of the first Metaverse platforms, Second Life, was launched as far back as 2003: this programme, reductively called a "social simulation game" by some, is an entertainment-focused Metaverse that allows users to create and customise their own avatar and interact with other users in a digital environment.

Particularly interesting is the concept of the *avatar*, which, according to many scholars of the subject, will in the future become the 'gateway' of each user to all the applications of the Metaverse (conceptually replacing what is now the fingerprint used to enter many Internet services), allowing a unique identification of the user (through the registration of all his personal, biometric, banking, etc. data) and thus the possibility of entering the new world and exploring, shopping, playing, making transactions and payments.

Finally, Spatial is an advanced augmented reality platform that focuses on collaboration and virtual communication by enabling users to collaborate in real time in a digital environment. Users can create and share virtual objects and display them in a variety of devices, including AR glasses, smartphones and tablets.

These large players are also joined by telecommunications operators who recognise the potential of metaverses and AR/VR applications to generate substantial revenue as they seek to reduce the cost of building next-generation 5G networks, which are critical to the operation of mobile AR/VR headsets and other devices. Major operators, including Verizon, SK Telecom in South Korea and China Mobile, hope to make money when 3D avatars of smartphone users start working, interacting and relaxing in offices, factories and digital entertainment venues.

In this group of pioneers of the metaverse, one can also find companies operating in the area of blockchain whose technology would seem to guarantee the democratic distribution of power. One of the main topics of debate, in fact, is the fear of a centralisation of control, which sees blockchain as a key and reliable tool

for guaranteeing individual freedoms. At the moment, this technology has supported the explosion of digital object exchanges, and for some enthusiasts, the vision of a fully functioning metaverse economy has become deeply intertwined with the concept of reliable blockchain and the applications that run on it, such as Decentraland, Cryptovoxels and Somnium Space.⁶

The growing interest in this beginning phase of the metaverse has coincided with the erosion of trust in traditional institutions, including governments and the financial sector, and the ongoing 'techlash' against technology platform companies. This could also fuel interest in more decentralised crypto-economic systems as an alternative to traditional financial players or large technology companies when it comes to conducting digital transactions or safeguarding digital assets (Eurasia Group 2021). Over time, participants in the meta-universal economy are likely to prefer platforms that they feel offer the best combination of security, privacy or other features that users consider most important (Kumari et al. 2022).

Even State powers are beginning to look with interest at the metaverse and the opportunities it offers to capitalise on access to a captive global audience.

While geography used to be the sole arena of international competition, today the economic, military and political confrontation increasingly extends to the digital metaverse, a new and further arena of confrontation between the great global powers, a concrete exemplification of an evolution of power (Dear 2022). An evolution that offers new opportunities for differentiation and new visibility and influence even to territories that are marginalised with respect to geopolitical axes, traditionally excluded from the global competitive contest, crystallised on rigid and, in some cases, obsolete political, economic and financial positions.

The rise of interactions in virtual environments, as has happened in other web developments such as social media, where smaller entities have gained huge amounts of influence simply by developing popular content, could represent an opportunity for smaller States to gain a more prominent place on the world stage. These smaller, less powerful nations could find themselves on a more level playing field, able to stay in the game in global affairs or perhaps forge unlikely alliances.

The link that seemed indissoluble between space and power and, therefore, between space and population, already weakened by the process of internationalisation, globalisation and technological progress, is in this context, profoundly modified. The target population, in fact, although strongly concentrated in the relational space of the platform, is nevertheless physically dispersed, thus assuming, in this deterritorialised dimension, almost the character of a nation in itself. Consequently, a new spatial concept is asserting itself that, confirming the dynamic nature already described in the 1990s by Massey (1992) and the possibility of freeing itself from the physical element by assuming a multiplicity of forms (such as the imaginary one of narratives, the nationalist mythology of utopias and dystopias of aspirational or anticipatory politics) (Koch 2022), offers geopolitical knowledge new opportunities to reflect on the territorial trap (Agnew 2018), as well as on the possible appropriateness of equipping itself, without falling into an

aspatial mode of thinking, with other interpretative and critical categories (Koch 2022). It must be remembered, however, that the decoupling between power and the purely geographical dimension is also exemplified in material reality and in international law, as in the case, for example, of the Vatican City, the smallest internationally recognised sovereign state, or, for different reasons, of the Sovereign Military Order of Malta.

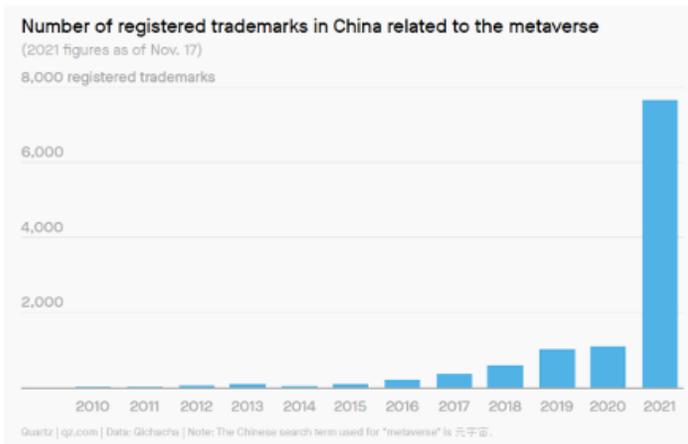
Therefore, a profound change is required in the conception, management and manifestation of power, which, increasingly dematerialised and fragmented (Fernandez et al. 2021), is generating new forms of military, regulatory, economic and, consequently, geopolitical competition between states and extraterritorial economies.

Of course, the Metaverse is also an important arena for the giants of global geopolitics.

China, for instance, considers the Metaverse as an important tool to consolidate its technological dominance and support its digital enterprises. As an example, it is worth mentioning that in 2021, the first industry group for the Metaverse, the Metaverse Industree Committee, was launched, which falls under the supervision of the China Mobile Communication Association (CMCA) (Concilium of European Union 2022), and that in November 2022, the first national-level policy document for the development of Metaverse-related technologies was published.

The Action Plan for the Development of Virtual Reality and the Integration of Industrial Applications (2022–2026), while not mentioning the ‘metaverse’ directly, provides the most comprehensive set of policies for its development, with key tasks and growth targets for the period up to 2026. By this date, China intends to expand the output of the VR industry to 350 billion yuan with sales of VR devices exceeding 25 million units⁷ and also wants to continue to support the development of a significant number of innovative and influential VR companies (*Figure 1*).

Figure 1. Number of registration trademarks in China related to the Metaverse.



Source: Concilium of European Union. General Secretariat (2022).

Indirectly, it is also possible to reconstruct the Chinese focus on virtual worlds by examining some secondary data. Virtual reality (VR) funding in China che more than doubled in 2021 despite the Covid-19 pandemic, entering a new period of “explosive” growth as government data showed, as Beijing ramps up support for the industry. Another report made by Tuoluo Research showed that funding, merger and acquisition volume in China’s VR and augmented reality (AR) industry reached 6.19 billion yuan (US\$871 million) in the first half of 2022, a 67 per cent increase from a year ago.

Also, the number of China’s NFT digital collection distribution platforms, increased dramatically in 2021 (He et al. 2022). In fact, China’s legal market for ‘digital collectibles’ is booming: The metaverse-focused information platform Gyroscope Finance estimates that 681 NFT trading platforms existed in China as of June, and that 100 new platforms have been created per month since March. According to the Hangzhou Internet Court – a Chinese court specialising in web-related legal disputes – NFTs *‘possess all the characteristics of physical objects, such as value, scarcity, controllability and marketability,’ and should therefore ‘be protected by the laws of the country’* because they also exist in a regulatory grey area without clear and comprehensive laws. NFTs are not banned in China, but they cannot be bought with cryptocurrencies and cannot be used as a speculative investment, as traders in other parts of the world often do. To this end, China will soon launch its first regulated platform for trading non-fungible tokens (NFTs).

The platform, which will serve as a secondary marketplace for the exchange of NFT, was created by the Chinese Technology Exchange and Art Exhibitions China - two State-owned entities - in cooperation with the private company Huban Digital Copyrights Ltd will also allow the exchange of copyrights related to digital assets. The project aims to *“regulate NFTs and avoid excessive speculation in secondary markets”*.

NFTs, which also exist in a regulatory grey area in China, without clear and comprehensive laws are not banned, but they cannot be bought with cryptocurrencies and cannot be used as a speculative investment, as traders in other parts of the world often do.

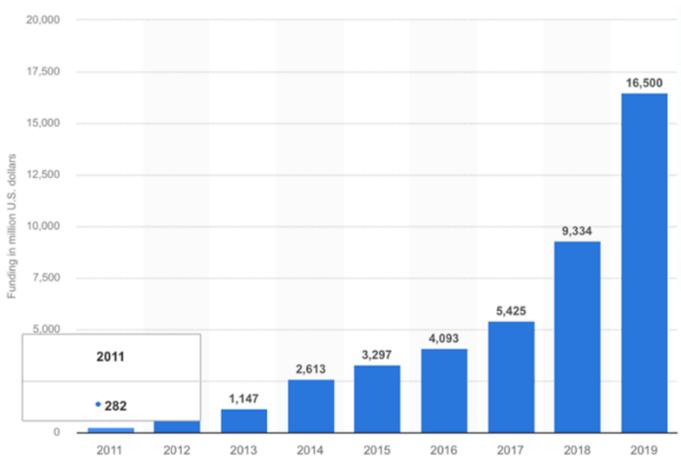
The point of view of the Chinese authorities is evident from the name itself: they are called ‘digital collectables’, not NFTs. they changed the references to NFTs on their sites to ‘digital collectables’ in October, probably.

Rather than on open networks that anyone can use, such as Ethereum’s blockchain, collectibles in China, as defined by the large Chinese technology companies Ant Group and Tencent to distance their products from their global crypto counterparts, are mainly built on authorised blockchains that can only be modified by authorised parties. This gives companies and authorities more control over content. Rather than start-ups like OpenSea, many Chinese NFT auction platforms are built by well-established Web2 technology companies. The government and companies are trying to curb the ‘financialisation’ of NFTs, i.e. to stop the popular speculative investments that took place during the last cryptocurrency bubble.

Like much of Chinese regulation, such as the Great Firewall that blocks certain parts of the Internet, this model attempts to restrict aspects of technology deemed undesirable by the authoritarian regime. The risk, however, is that the Chinese model could become a benchmark for other regulators in the region and globally.

Similarly in the United States, which unlike China never mentions the metaverse, funding for artificial intelligence companies, the technology behind the metaverse, increased exponentially in recent years, growing from a little under 300 million U.S. dollars in 2011 to around 16.5 billion in 2019. Overall worldwide funding in AI start-ups amounted to approximately 26.6 billion U.S. dollars in the same year (Statista 2023) (Figure 2).

Figure 2. Artificial intelligence funding investment in the US from 2011 to 2019 (US \$)



Source: Statista (2023).

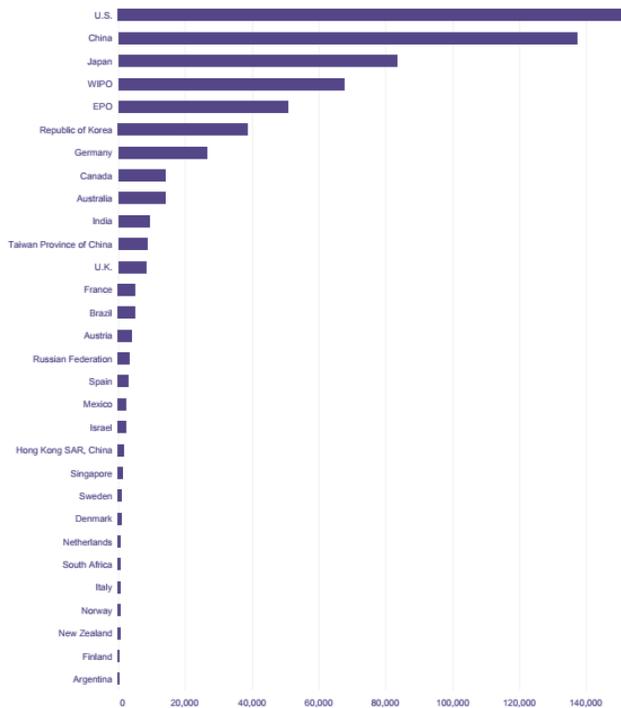
The country also continues to invest heavily in artificial intelligence companies located in China, a state of affairs that shows how some interests transcend significant differences in values, especially concerning the issue of privacy rights, security and free competition.

However, perplexities of various kinds related to the digital realm and the problems it can generate, together with the immaturity of the supporting technologies, have led to a cooling of the markets, which can be effectively described by recalling the approximately 2 per cent drop in sales of virtual reality headsets in December (NPD Research), the \$13.7 billion operating loss in 2022 of Reality Labs, the company that produces the Meta Quest headset, and the significant number of lay-offs in the industry.

Nevertheless, the recent passage of the CHIPS and Science Act has excited scientists and experts in cutting-edge areas such as quantum computing, AI and robotics, which could receive billions of dollars in new research funding.

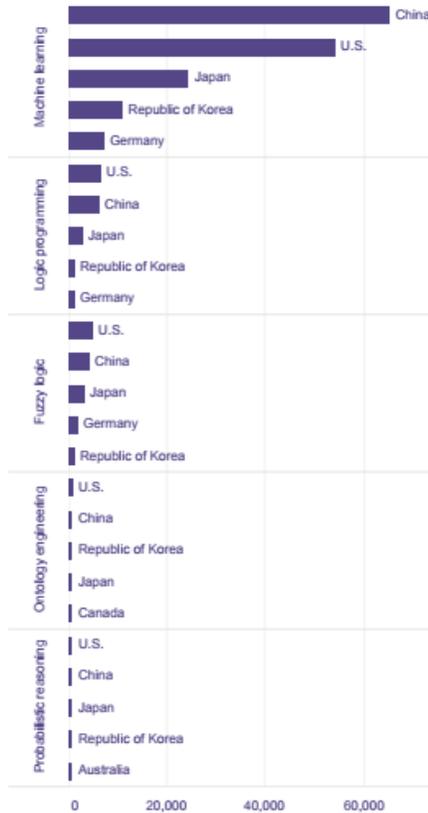
One of the most unexpected inclusions of the bill is a directive for the National Science Foundation to research ‘immersive technology’ – the generic term for the type of virtual and augmented reality that should underpin the metaverse. Its inclusion is a victory for the XR Association, a trade group for virtual and augmented reality technology companies founded by giants such as Google, Microsoft and Oculus, among others, which lobbied hard for Congress to add it. Numerous other regulatory provisions, moreover, would seem to offer funding opportunities for research and development of metaverse-related technologies, which would seem to be seen as a means to assert the competitive advantage and leadership of the United States in the global economy (Congressional Research Service, 2022).

Figure 3. Overall number of applications by patent office



Source: WIPO (2019). WIPO Technology Trends 2019: Artificial Intelligence.

Figure 4. Top patent offices by number of patent applications for different AI techniques.



Source: WIPO (2019). WIPO Technology Trends 2019: Artificial Intelligence.

Confirming the US interest in the Metaverse, it can be observed that the largest number of patent applications on artificial intelligence are filed in US patent offices (Figure 3). In addition, the US ranks first in highly cited patent families, indicating that inventions made in this country have a considerable impact (Figure 4).

The US leads in patent filings for all categories of AI techniques (probabilistic reasoning, ontological engineering, fuzzy logic and logic programming), with the exception of patents for machine learning, which are more widespread in China.

The evolutionary trajectory of global strategies on the metaverse presents high degrees of uncertainty and actors, especially state actors, have not yet revealed their cards. The decoupling of data flows, which has been going on for some time, risks dragging the metaverses along with it, leading to the creation of a system of parallel digital universes, impermeable to each other, founded on highly diversified principles and values: decentralised, democratic, fully or partially interoperable those developed in the western world, centralised, authoritarian and censored

those developed beyond the Beijing techwall. They are present on largely Chinese hardware and are integrated with political preferences and social controls from Beijing or Moscow.

The complexity of management, the risks involved in managing the individual, political and social preferences of a potential pool of billions of users, requires a joint effort to define new multilateral mechanisms for regulatory collaboration, while enabling interoperability, both across national borders and in the metaverse.

The need to invest in this direction is strongly perceived in the European Union, where the desire to regulate, govern and manage this new technological paradigm is strongly emphasised, avoiding the same mistakes made in the past and reducing the risks of potential abuses of power. Although the declarations of intent were very clear and geared towards emphasising the desire to affirm respect for European values, while at the same time safeguarding the competitiveness of businesses, and the plurality of opportunities, the first steps at the moment do not seem particularly satisfactory. The experiment of the Union’s institutional metaverse, Global Gateway, which started as a digital marketplace to raise young people’s awareness of EU policies and values, has been frozen for the time being after the failure of the first public event. Moreover, the investments planned to support the development of the sector and enabling technologies, although considerable, are not yet comparable with those made by other global geopolitical players whose companies dominate the markets and aspire to gain significant competitive advantages (Figure 5).

Figure 5. Companies operating in the Metaverse

US companies	Chinese companies	Other companies
At the forefront: Meta (Facebook)	At the forefront: Tencent	
Others: • Epic Games • Roblox Corporation • Nikeland • Nvidia • Microsoft (Oddly silent: Google and Amazon)	Others: • ByteDance • NetEase • Bilibili (In China, tech companies have formed the Metaverse Industry Committee)	Dyson (UK) Aldin (Iceland) Sensorium (Russia)

Source: Concilium of European Union (2022).

Conclusions

There are many controversial aspects of a deregulated space like the current Metaverse: from the imbalance of powers, to the threat to the sovereignty of States, to the regulation of ownership of digital spaces, to the exercise and protection of rights, to name but a few. In the new digital world, states therefore not only often find themselves dependent on multinational corporations or third-party non-State actors, but also on the technology itself, whose possibilities of control are strongly linked to the regulation of the platform. One can imagine that, as was the case with Google in the Internet, whoever succeeds in acquiring the regulatory and technological tools for its regulation will gain a significant competitive advantage in terms of control and, hence, power.

Understanding the relationship between geopolitics and innovation, defining the interdependence between Big tech and political control, analysing the geo-economic, military and technological rivalry between the world's superpowers, is fundamental, as well as necessary, to decipher the future directions of political and social relations and to prepare the necessary and desirable investments to manage the competition.

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Notes

¹ <https://chat.openai.com/chat>, 19.3.2023.

² <https://accademiadellacrusca.it/parole-nuove/metaverso/21513>.

³ <http://meta.com/it/metaverse/impact>.

⁴ Meta, as it is known, undertook this development activity, iconically abandoning the previous, established brand name 'Facebook, Inc.' in 2022, in order to emphasise the value of the new strategic corporate direction.

⁵ Ibidem, Nick Clegg, President, Global Affairs presso Meta.

⁶ This has fuelled interest in the potential for new digital instruments such as stablecoins - a form of cryptocurrency backed by real-world assets, designed to be platform agnostic and maintain a relatively stable value - to serve as the financial backbone of the metaverse.

⁷ TikTok owner ByteDance, which bought VR headset start-up Pico, recently launched its new Pico 4 stand-alone VR device, which has received positive reception in China, where the competing Quest 2 from Facebook owner Meta Platforms is unavailable.



Photo/Iván Halász

POLITICAL IDEOLOGIES AND SOCIAL IMAGINARIES

Luís Lóia

Political ideologies in question

■ In social studies, a political ideology is a certain set of ethical ideals, principles, doctrines, myths or symbols of a social movement, institution, class or large group that explains how society should work and offers some political and cultural blueprint for a certain social order. Thus, ideologies offer an explanation of the prevailing order, develop a model of the future that is desirable in the idea of an “ideal society” and explain how this end can be realized by the society in question.

Schematically we may point out some functions that a political ideology exercises to give meaning to a social order. They provide comprehensiveness – not only of an ideal, but the needed transformation of society to accomplish the full realization of the ideal; a stable system of ideas – regarding the ‘isms’ – as a configuration ideas and attitudes in which the elements are bound together by functional interdependence; sharedness and identity – between the ideological primary group, social movements, classes or parties; way of translating ideas into action and mobilization – they give general and specific directives for action.

A political ideology largely concerns itself with how to allocate power and to what ends it should be used. Political ideologies have two dimensions: (1) goals: how society should be organized; and (2) methods: the most appropriate way to achieve this goal.

As a system of thinking oriented towards the action, political ideologies are inclusive, they fit to all of the “isms”.

In the modern constitutional scenery, that is, in the post-French revolution and the establishment of constitutional regimes, the “isms” associated with political ideologies appear, such as liberalism, conservatism and socialism. Of course, in the United States of America in which liberals continue to be on the left and conservatives on the right (as is their practice), because in this territory socialism or communism never took hold and therefore liberalism has never been displaced, but those are particular ideologies.

Liberalism, conservatism, socialism or even populism are particular ideologies as they differ from a total ideology. A total ideology, or *Weltanschauung* (world-view) in comparison, is a comprehensive belief about ultimate questions and consequently less vulnerable to relativities. Ideologies such as humanism or theism could be seen as total ideologies, and they are resistant to critical examination. Total ideologies are a matter of beliefs about the world, not empirical constructs about this or that in the world. Total worldviews can survive doubt and adverse experience, but particular ideologies cannot. Particular ideologies, on the other hand, are theoretical constructs about this or that world, subject to empirical verification, space and time located, subject to modifications, variations, and deviations, and, as so, vulnerable to critical examination.

Since they are subject to critical examination, we may question: Does political ideology cease to have a place in a post-modern and globalized world, which has social fragmentation as its characteristics?

The end of ideologies’ thesis

Western neo-liberal democracies are often and shortly characterized by having a representative procedure of participation in the public sphere of life, determining a self-rule form of political regime, affirming the sovereignty of the people in a specific territory; an economic welfare system; political institutions that administer and organize public life on the basis of their citizens’ confidence; public security and order. This instrumental approach to the definition of Democracy, characteristically of a capitalist society, as it was put forward by Joseph A. Schumpeter, means that «the role of the people is to produce a government, or else an intermediate body which in turn will produce a national executive or government. And we define: the democratic method is that institutional arrangement for arriving at political decisions in which individuals acquire the power to decide by means of a competitive struggle for the people’s vote» ([1942]; 2003: 269).

In a democratic neo liberal context, one of the most important aspects that keeps people living together without major conflicts among themselves is economic security, that is, the means to pursue their interests and to flourish by achieving their personal or communal objectives and living a meaning and fruitful live. That implies having the opportunities to climb up the social ladder; to access better jobs and functions available in society and to benefit from a fair social

welfare system, which is presented as one of the most important conquests in the outcome of World War II, as well as higher degrees of industrialization and consequent economic development, that specially contributed to the pacification not only between societies, but also among citizens.

Combined, equality in political liberty and economic security are the foremost characteristics that endorse the importance of National States in the shaping of modern societies in the second half of the 20th Century, yet that has not prevented the rise of other kind of problems and challenges to the spread of democracy worldwide. Not only at a political level but specially on moral grounds since a state is not only a political entity, but also a National one. The justification for it relies on the fact that, as societies become more complex and people's relations and interactions increase and become more intricated, so does the bureaucratic level of administration, as well as the level of expertise to deal with such a complex way of political organization. As a result, professional politicians are required to do the job and those politicians, from top to bottom, do not recognize the ability of an average citizen to address such complicated social matters. This depoliticization increases the feeling that we are faced with what Daniel Bell has called the End of Ideology.

The End of Ideology thesis, put forward by Daniel Bell sustains that ideological differences will become more restricted as nations experience social modernization (Dalton 2005). Considering that the main objective of any government is to generate the resources to respond to the most important social needs: provide economic wealth and security. Considering, also, that the increasing complexity of a developed industrial society leads to the formation of a more differentiated social structures, with more complex patterns of social and economic relations and with more interactions between members of the same political community, the ideals of traditional political ideologies may be conceived as already accomplished. A second element of Bell's thesis is that modern societies are increasingly secular. A trend that diminishes the moral content of the political debate. Furthermore, he argues that, traditionally, political ideologies have had to compete with religion for public support. As religious attachments were moderated, so too could emotional attachments to a political position be moderated. Religion remains an important element in many Western democracies, but its influence has diminished as a consequence of social modernization, the same logic of that argument may be applied to political ideologies.

As Bell suggested, social modernization does seem to transform the extent and bases of ideological polarization within contemporary societies. «In the Western world, therefore, there is a rough consensus among intellectuals on political issues: the acceptance of a Welfare State; the desirability of decentralized power; a system of mixed economy and of political pluralism. In that sense, too, the ideological age has ended» (Bell, 1960: 373). The apparent erosion of class clashes in Western democracies and the emergence of a consensus in support of the welfare state have been taken as indicators of the erosion of traditional ideological divisions. As so, ideology had ended!

In his commentary on the End of Ideology (2000), Bell argues that ethnic and linguistic cleavages are strengthening in the developing world, providing a new basis for division – even if these divisions are not fully expressed in a broader worldwide view or ideology. Those different sets of ideology may explain why developing societies are so polarised, given that political orientations are now also shaped by moral issues and national identity. This pattern also suggests that these divisions will be more difficult to manage than economic competition in advanced industrial democracies (Dalton 2005).

The decline of ideological differences and the observation that ideologies no longer generated fundamental conflicts and violent controversy have to do with the fact that we are experimenting a growing agreement in a number of policy areas where sharp conflicts formerly prevailed. Conservatism, liberalism, socialism are no longer systems of ideas presenting a theory of development and prescriptions. In European societies ideological orientations giving way to pragmatic ones.

Indeed, social modernization does transform the content of ideological polarization and the degree of this division. Nevertheless, the ideological structures are important in modelling processes of coalition formation, political representation, and electoral competition. In summary, it is premature to argue that ideology is ending in any region of the globe because citizens still rely on political orientations such as Left or Right for their political action.

A new engagement for Civil Society

Active citizenship is a recognizable key characteristic to comprehend and justify what may be a healthy democratic regime. Considering that Active citizenship is open concept that may be defined as «an umbrella term for the acquisition and exercise of rights for civic and political participation. As such, it includes citizenship and residence, membership in (political) organisations, voting, running for office, volunteering, or participation in political protest» (EU, Glossary, 2013)

In fact, we may distinguish between consolidated or stablished democracies and new democracies in terms of political participation of citizens, not only in the ballots, but in daily life.

As mentioned by Ekaterina Enchikova, Tiago Neves & Pedro D. Ferreira (2001):

(Historically, the studies of AC have focused very much on formal political participation, which has always been the main concern for politicians and therefore often placed at the centre of research (Parry et al., 1992). However, formal political participation is only one way of being an active citizen. Many researchers currently speak of non-formal or non-conventional political and civic participation (Kennedy, 2007; Menezes, 2003; Zukin, 2006). As stated by Stevenson et al. 2015: 194, *ibid*):

In the past two decades there has been a general movement away from research focused exclusively on the legal status, rules and regulations of citizenship towards research focused more broadly on citizenship as constituted in the routines and practices of daily life, in the meanings of interactions and the dynamics of identities».

This allows us to justify not only the thesis of the end of ideologies as a way to understand citizens engagement in political life, but that a serious analyses of what means to become and participate in our political communities is now more complex and needs to be addressed by political scientists and scholars, in broader sense, at different levels that cannot be reduced to simple or simplistic cleavages between left or right political spectrums.

As stated above, once health and wealth-care, basic liberties, education, civil and political rights are granted, and that is the case on establish democracies (compare, for example, how different countries are index at United Nations Development Programme (UNDP), The 2021/2022 Human Development Report), citizens become to be engaged in other non-formal forms of political participation. Citizens are now engaged, more in questions that they felt that should be addressed not only by politicians, nor only by left or right wings parties, but, additionally, their problems may be addressed by civil society as a whole - perhaps it may be more accurate to affirm, they should be addressed by the communities.

Questions such the manifestation of an identity; preserving national identities, and cultures, in face of the challenges posed by migratory movements; the integration of those migrants in social and political spheres; Human Rights, Gender – affirmation and manifestation, but also equality, parity and political representation –; the generation gap, the problems posed by sustainability (in broader sense) and how to address climatic changes. Those are a few of the major problems that citizens and civil societies are now facing and engaged with (see Eurostat Chart; Appendix).

This new engagement of civil society in informal citizenship participation on political communities can also explains de decrease in Voter Turnout¹. Has pointed out by The International Institute for Democracy and Electoral Assistance (IDEA):

«The number of countries that hold direct national elections has increased substantially since the beginning of the 1990s. However, the global average voter turnout has decreased significantly over the same period. (...) If voter turnout in Europe, for example, continues to decline at the current rate, there is a risk that elections might lose their appeal in the region as a fundamental tool of democratic governance». (IDEA 2016)

Political ideologies and social imaginaries

In what concerns to the End of Political Ideologies debate, we need to go deeper. In fact, ideologies are a resource for ordering, defining, and evaluating political reality and for constituting identities. Ideas that place the individual in a social context and generate a collective feeling of inclusion. They provide a perspective for understanding the world, support certain beliefs or political values that guide human behaviour, and set goals to achieve. They are culture concretions, manifestations of what ought to be social life, and, as so, as they provide different

standards of understanding institutional life, they reflect culture social patterns, i.e., they furnish, among other elements, a social imaginary.

But what is a social imaginary?

In 1975, Cornelius Castoriadis used the term in his book *The Imaginary Institution of Society*, sustaining that the social imaginary has not been composed by conceptions about what a society is but by what gives sense to the symbols, the goods, the institutions, i.e., what configures the *ethos* of a group. In these terms, the best way to define a society is a set of shared and unifying conceptions that provide a significant content and are framed in symbolic structures.

Benedict Anderson emphasizes the constructive aspect of the imaginative creations but goes beyond the specificity of meaning and signification underling several social imaginaries as a differentiator source between societies. To Anderson, the same social imaginary does not only have a differentiator and identity aspect of a particular society. To Anderson, the social imaginary is not the only identity differentiator of a particular society; it is more than that – it is transversal to different groups or societies, and it is formed and developed in history in its civilizational terms. An example of this conception is the social imaginary underlying to the concept of nation. The modern concept of nation has been instituted in many societies, since the end of the 18th century, because people were called to participate and to take part in similar kinds of social practices, forming, due to public participation, imagined communities that helped to fixate new identities or new nations. If we understand nation as «an imagined political community – and imagined as both inherently limited and sovereign» (Anderson 1991: 15), we can understand that the social imaginary is not specific of a group or a society, mas but it is shared by different societies.

Taylor has acknowledged the influence of Benedict Anderson in his formulation of the concept of the social imaginary. He states: «What Is a “Social Imaginary”? (...) By social imaginary, I mean something much broader and deeper than the intellectual schemes people may entertain when they think about social reality in a disengaged mode. I am thinking, rather, of the ways people imagine their social existence, how they fit together with others, how things go on between them and their fellows, the expectations that are normally met, and the deeper normative notions and images that underlie these expectations» (Taylor 2004: 23).

Charles Taylor emphasizes that a modern social imaginary is not the way society imagines, but the way we imagine society. This is a very significant turn in the mainstream theory on social imaginaries. It is no longer a social or sociological theory, an external observation that allows a characterization and an empirical definition of what a society may be, as in Castoriadis; nor if the same social imaginary is extensible or common to different groups or societies as the underlined imaginary of the notion that Andersen uses as an example.

Departing from Andersen´s thesis, although with an emphasis on phenomenological analysis, Taylor reaffirms the importance of cultural models that enlighten a

vision of the world and that are sources of identity to those who share them, but he stresses that the social imaginaries are now modern, i.e., fit not only in groups or nations, but also, in its own way, in the individual.

It is in this sense that the notion of national community, the one of a nation, demands a comprehension of the specificity of a cultural particularity and not merely an assertion of political ideologies that may characterize them. In fact, particular political ideologies, as liberalism, conservatism or socialism are no longer the main identity references for a nation; on the other hand, a collective community compromised with certain values and ideals that articulate the same social imaginary in factual political programs seems the most adequate criterion to define, nowadays, what a political ideology may be.

This is, in Western neo-liberal societies, I suppose, a much deeper sign, a sign that shows or anticipates the end of classical cleavages between political ideologies such as liberalism and socialism. People no long care whether left or right wings control political institutions. But that, I think, is only the superficial outlook of a misguided or distorted interpretation. There is a spread sense that the State is too big to solve small problems and too small to solve big problems and the majority of problems that people face in their everyday lives are too small to deserve attention and the intervention of a centralized government. As such, we are starting to witness a growing sentiment of frustration, especially because participation in political life, to be involved in determining the shape of our societies, is an important aspect of affirming our own personal identity.

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What it is determinant to understand modern active citizenship or what are the major interests of civil societies may be are not the political ideologies, those can be easily identified, but what is fundamentally are the cultural models which are shared in a similar way and the common implicit schemes of the world interpretation.

A collective identity is composed by different and subjective interpretations of what unites its members, and, because of it, it is a shared mental realm, more symbolic than normative, more imaginary than statutory. It provides the context through which a specific political organization may exist and the comprehension and justification of its institutions (Steger 2009).

As we experience this changing in the political ideology to the social imaginary, the feeling of interdependency and the need of a relation and the encounter between cultures and civilizations, which is inherent to that change and to the evolution of the social imaginary, is, at the same time, the reason of his weakening and fragmentation. The thesis is: in the same way the globalized world has been affirming a global imaginary, the social imaginary of a Nation is degrading, what, necessarily, results in a diffuse understanding and in a disfigured affirmation of the personal and collective identity. The national feeling, of belonging to a Nation, is progressively defied by a global feeling, the one in we belong to the world.

Of course this global imaginary is only possible because it has the means to constitute and to affirm itself, and that affirmation goes through out the action of the individuals that, for reasons like distorted representativity, partisanship, elitism, populism and negative nationalisms, but in particular by economic globalization and by the affirmation of a public opinion through media networks that are formed worldwide (Urbinati 2014), forge new identities or identify other sources of identity that also give meaning to their being and their being in the world, giving rise to new cosmopolitan ideologies. However, this global imaginary is incomplete and dysfunctional since it lacks the foundations and the social and political institutions to constitute itself as a global social imaginary.

In terms of the imaginary globalism attempted by economic and political elites, it points out its positive aspects such as the general increase in the standard of living, the reduction of poverty on a global scale and technological progress. However, we can also identify its dangers: accentuated social inequalities and marginalization of those who are left behind, the proliferation of conflicting forms of self-interest satisfaction, the accentuation of individualism and the destruction of the bonds of solidarity between individuals and peoples, environmental destruction and, above all, the weakening of democratic forms of participation in the construction of the world in which we live and want to live in.

Although incomplete and dysfunctional, this global or planetary imaginary is a cosmopolitan imaginary that is created around a social and political sense, individually formed, and affirmed in opposition to the social and political sense of a collectively shared nationality. It emerges through a notion of cultural unity promoted by globalization and depoliticization of principles of social and political organization that are now considered natural and universal. Without the need for institutional support, allied with an ideal of authenticity based on an individualized, atomized, and radicalized notion of autonomy and self-realization, the consequence is the rise of an ordinary life in which the affirmation of the equal dignity of choices leads to moral relativism.

Nevertheless, UN is attentive to this new reality, with its inherent virtues and risks, and, as so, has target as one of the goals of her 2030 Sustainable Development Strategy, Global Citizenship, considering that:

“Global citizenship is the umbrella term for social, political, environmental, and economic actions of globally minded individuals and communities on a worldwide scale. The term can refer to the belief that individuals are members of multiple, diverse, local and non-local networks rather than single actors affecting isolated societies. Promoting global citizenship in sustainable development will allow individuals to embrace their social responsibility to act for the benefit of all societies, not just their own.” (UN SDG 4)

It isn't, anymore, a question of political ideologies. New models of citizenship are in place and, in order to understand them, we may need to conceive the current formation of a different social imaginary.

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Notes

¹ «Voter turnout is one of the crucial indicators of how citizens participate in the governance of their country. Higher voter turnout is in most cases a sign of the vitality of democracy, while lower turnout is usually associated with voter apathy and mistrust of the political process. In Europe, voting is compulsory in Belgium, Greece, Cyprus, and Luxembourg» (IDEA 2016).

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CAPACITY TRAINING: TRAINING AND CAPACITY IN THE EVOLUTION OF PUBLIC ADMINISTRATION IN ITALY

Gianluca Luise

Introduction

■ More than 25 years have passed since Law 241 of 1990 that introduced new principles concerning what was considered the main “product” of public administrations: the administrative procedure. Law 241/90 outlined a reform that was completed with another law of principle relating to the system of local self-government, Law 142/90, and with Legislative Decree 29 of 1993, which attempted to enhance the role of the public manager by clearly separating the functions, and therefore the responsibilities, of political figures and managerial figures.

The 1990s were the years in which Minister Cassese introduced the view that public administration is at the service of citizens, opening the importance of improving the skills, including cultural skills, of public administration personnel. The revolution was to incorporate into the administrative, bureaucratic and self-referential culture the principles of effectiveness and efficiency that were so distant from that culture that they were not immediately understood and, consequently, properly incorporated into organisational processes.

This reform was followed by the one led by Minister Bassanini that, in the wake of the previous one, strengthened the concept of simplification of administrative procedures, that of transparency and, above all, introduced the principle of subsidiarity, defining a model that decentralised and entrusted the municipalities, the local authorities, with responsibility for all administrative actions, entrusting higher-level bodies with coordination and support roles. The amendment of Title

V of the Constitution is also part of this phase, consolidating the principle of autonomy of local authorities and the principle of subsidiarity, including horizontal subsidiarity.

This great change in the role of public bodies has generated serious difficulties in defining the boundaries of administrative action and the actual roles of the bodies. The realisation of this great change therefore clashed with the confusion generated by a very strong model change that was not accompanied in its concrete implementation.

The third major reform was that of minister Brunetta, who in 2009 again sought to improve the efficiency, transparency and productivity of public administrations, emphasising the need for quality public services and a high level of organisational and individual performance.

Almost 10 years have passed between the second and third reforms, in which the only relevant step with respect to reform processes is not regulatory but project-related in nature. It was a National Programme to support change that the Department of Public Administration followed for about 5 years, involving thousands of public administrations, working on the creation, dissemination and enhancement of the know-how and skills of managers and officials. The limitation of this Programme was that it did not have a strong political heading: shortly after the Programme was launched, the minister changed and the successors did not play a strong role within governments.

The fourth reform is the one initiated in the Renzi Government with the approval of the Delegated Law 124/2015, named after the Minister Madia who signed it.

Counting them well, the years are 26, the Governments 18, the legislatures 8 and 15 are the different ministers of the Civil Service. We have passed 15 legislative interventions and what is certain is that all of them have had the certain effect of introducing reference principles and possible ideas for change without, however, succeeding in significantly changing the functioning of their ultimate recipient: the PA.

All the reforms mentioned have addressed the issue, in different ways, of conceiving a change of a cultural nature as well, which, starting from a new idea of the PA oriented towards service and the pursuit of the common good, would devote great importance to training or retraining the skills of employees, building a “public service vision” as well as an “innovative mission”, capable of innovating the very idea of the strategic role played on a daily basis for the country by the integrated system of public administrations, its managers and operators, improving the European data according to which Italian public employees are among the least qualified: only 30% of public employees have a university degree, compared to 40% of their colleagues in Great Britain.

In such a scenario, therefore, it seems inevitable that the enhancement of the human capital of public administrations and the development of skills, is central to the National Recovery and Resilience Plan: the success not only of the NRP, but of any public policy aimed at citizens and businesses, is at stake on people.

The stages of change and the role of training

Investing in the training of PA staff is, therefore, a practice that has been consolidated for many years in our country: already in the spirit of the Government-Syndicate Memorandum of Understanding of 23/7/93, structural instruments for the promotion of professionalism were drawn up. Article 1 of Legislative Decree No. 29/93 assigned the Administrations the obligation to take care of the training and professional development of personnel, with the aim of “gradually integrating the discipline of public employment with that of private employment”; this was achieved in the light of the then new wording adopted (Legislative Decree No. 80/98) by the delegated legislator: in fact, it is envisaged to “achieve the best use of human resources (...) by applying uniform conditions with respect to those of private employment”¹.

In this way, not only was the part of the reform relating to the so-called implementation of the contractualisation of the employment relationship of public administration employees considered to be underway, but above all the attention was decidedly turned to the next phase, namely the identification of more effective and efficient ways of using human resources, which was expected to take place through specific interventions, such as training and the promotion of the professional development of employees.

The above-mentioned objective of the reform was contained in Article 1(1)(c) of Legislative Decree No 29/93, as replaced by Legislative Decree No 80/98, and was accompanied by the principles set forth in subparagraphs (a) and (b), which were not reformulated by Legislative Decree No 80/98, such as: (a) “to increase the efficiency of administrations in relation to that of the corresponding offices and services of the European Community (...)”; (b) “increase the efficiency of the administrations in relation to that of the corresponding offices and services of the European Community (...)”; (b) “rationalise the cost of public labour, containing overall expenditure on personnel, direct and indirect, in compliance with public finance constraints”. By rewriting letter c), the delegated legislator emphasised the principles contained in letter a) of the same article, relating to effectiveness and efficiency; it was emphasised that they are also pursued through the better use and valorisation of human resources, attributing to them a leading role in the pursuit and achievement of these objectives.

It has been emphasised that linking organisational strategies with personnel policies can create an effective synergy for an administration at the service of the citizen, which seeks and wants to pursue its objectives with efficiency and effectiveness, since “personnel development policies are placed with respect to organisational strategy in an active and anticipatory position, aimed at removing constraints and developing opportunities for both the organisation and the personnel”. In this way, the principle of human resources development has come to play a central role in the new structure of Legislative Decree No 29/93 and subsequent amendments and additions.²

In fact, it is quite evident that, starting with the aforementioned legislative decree and continuing with law no. 127/97, which mandated all the aforementioned redesigning of the architecture of the structures, and finally with the new professional regulations (in which the powers of personnel management on the part of managers or holders of organisational positions are increasingly accentuated), employees have finally been considered as a resource, and a resource that is increasingly financially borne by the local communities, and therefore to be managed according to managerial logic, preceded by a study, let us say, of profitability. The attention paid to training in the CCNLs also took the form of the mandatory indication of allocating 1% of the wage bill to the training of the employees of each Administration, in application of directive No 14/95 of the Department of the Civil Service.

The new employment contracts provided for a professional system that allowed for horizontal and vertical economic progressions based on a system of evaluation and selection. All the training activities carried out by employees were thus to lead to the awarding of a qualification for subsequent evaluation in the context of economic progressions. To carry out these training activities, the Administrations had to cooperate with the Scuola Superiore della Pubblica Amministrazione, with the Institutes and Training Schools existing within the Administrations themselves, with Universities and with other public bodies and private companies specialised in the sector.³

On 12 March 1997, the government and the social partners also signed the “Protocol of Understanding on Public Employment” in which a large section was devoted to the enhancement of human resources. The protocol emphasised the need for a significant economic commitment, including through the use of EU resources, to trigger reorganisation and modernisation processes based on staff training.

The importance of public-sector staff training was also emphasised during the first National Conference on Training in the Public Sector held in February 1998.

The conference constituted the first important opportunity for wide-ranging reflection on training issues in the public sector. The intention was to overcome the difference between the public and private sectors and to affirm the issues of quality and the necessary planning of training for public employees.

As evidence of the increased role of training, the “Social Pact for Development and Employment” of 22 December 1998 provided, inter alia, for the government’s commitment to create a Master Plan on training and, within it, an Extraordinary Multi-year Training Plan for PA personnel, subsequently prepared and approved in 1999 by the Unified State-Regions-Local Authorities Conference. The contents of the Plan were aimed at promoting training linked to innovation and reform processes.

Subsequently, the Directive of 13 December 2001 of the Department of Public Administration was addressed to all ministries, Local Authorities and public organisations in any capacity concerned⁴

The Directive, destined to mark the retraining of all public personnel, is a complex and exhaustive document that identifies two objectives and tools for “an

effective analysis of training needs and the planning of training activities to guarantee the individual right to lifelong learning in line with the institutional objectives of the individual administrations".⁵

In summary, the Directive identifies three essential challenges for public training: the demand for new skills, computerisation and the management reform process. By placing at the basis of the retraining process the responsibility of managers towards their staff and the adoption of quality criteria (corresponding to the most advanced methods of designing and managing training actions), the Directive provides indications on the priority contents of training and on teaching methodologies, drawing heavily from the conclusions of the Annual Reports on Training in the Public Administration. Furthermore, it appropriately identifies actors and roles in the process and provides hints on possible partnerships and resources to be employed.

In the context of partnership, another document worth mentioning is the Memorandum of Understanding between the Department of Public Administration and Confindustria, signed on 7 November 2001, which in Article 6, among the support actions and implementation measures, mentions training, indicating that "the Parties, also with a view to developing a training path for public managers that takes into account the contribution that the public administration can make to economic development, agree on the need to collaborate in the definition of innovative training methodologies and contents." In this context, topics relating to human resources management, planning tools and management control, as well as training and information on issues affecting the competitiveness of the productive fabric, such as the environment, safety, health and town planning, also in relation to the competences of the European institutions in this area, were addressed. In addition, the parties promoted the development of training projects oriented towards the managerial application of the new budget rules, which, also at the request of the regions concerned, would be jointly addressed to civil servants and officials of the business associations, in order to foster the construction of common languages and the sharing of management techniques and tools of the two systems.

On 28 May 2008, the so-called "Programmatic Lines on the Reform of the Public Administration - Industrial Plan" were presented⁶ to address the modernisation of the Italian administration through a series of reorganisation measures, the revision of production processes and the improvement of services.

This reform programme was then transferred, to a large extent, into regulatory measures on the optimisation of public work productivity and the efficiency and transparency of public administrations. In this regard, we should also undoubtedly recall the Directive of the Minister for Public Administration 10/2010, which emphasised that as part of the administrative system reform strategy, the enhancement of human capital should be considered a key element of any reforms of the Italian administrative system.

Within the directive, therefore, training of public administration employees became a fundamental and essential dimension to manage the changes triggered in the administrative system in the period following the great economic crisis and to guarantee a high quality of services to citizens.

The document, moreover, through a reference to the Lisbon Strategy, underlined how the issue of training public personnel was also central to the European political agenda.

The results obtained

Addressing the issue of training of public personnel in Italy, one is faced, first of all, with the need to recompose a framework starting from a number of incomplete and uncertain pieces: lack of detailed structured data on the training provided and on the recipients, but also on the supply available, set up by public and private subjects; weakness of the training planning systems at the level of individual administrations.

This is an incomplete and not exhaustive picture, which does, however, clearly show some trend lines: it is objective, for example, that the training provided to public employees has shown a significantly decreasing trend over the last decade, also as a result of the spending review policies: in 2019, expenditure on training for public administration personnel amounted to 163.7 million euro, more than 110 million less than 10 years ago: with this expenditure, each employee has benefited, on average, from about 10 hours of training per year. The only exception was the period of the Covid-19 pandemic, which saw an increase in investment in staff training, thanks in part to the overcoming of expenditure ceilings⁷.

Quantitative data show a progressive disinvestment process co-responsible for the serious shortage of public personnel, in terms of skills, whose negative effects are accentuated by the speed of change processes and the ageing of employees. The contraction of information expenditure has deeply damaged the quality of human capital, due to the failure to promote new skills, starting with those related to digitisation processes. Yet, if we broaden the perspective of analysis beyond the ways of investing in training that we could define as ordinary, administrations have received few resources in recent years to finance interventions to strengthen the skills and capacities of their staff. Impressive, for example, has been the volume of training provided in the form of coaching and support for the implementation of public administration reform policies, financed with national funds and with European structural and investment funds (EIS); the most recent example, in this sense, is represented by the national operational programme “governance and institutional capacity” 2014–2020, which has provided for a specific objective (OT11) dedicated to institutional and administrative capacity (strengthening institutional capacity and promoting an efficient public administration in the delivery of services).

The aforementioned investments, by reserving a significant amount of resources for administrative strengthening and capacity building activities, have not only made it possible to significantly offset the reduction in ordinary training expenditure of individual administrations, but also to provide training with high added value, enabling innovation and transition processes (administrative, digital, etc.).

Of course, there was no lack of criticalities. Often, for example, staff training interventions financed with Sie funds have been conceived and implemented as a sort of shortcut in investment processes on administrative capacity, due to the relative ease of setting up and implementing them, of reaching a high number of recipients and, therefore, of realising the expenditure, which unfortunately remains, in the philosophy of the use of these funds, the main objective.

It is difficult, also for this reason, to attempt a balance, even if only as a first approximation, of the results of the training provided in favour of public administration personnel. It is even more difficult to assess the link – most of the time not very explicit and conscious, at least in the objectives, at other times to be reconstructed ex post – between the development of employees' individual knowledge and skills and the structural strengthening of administrations. One link, however, is fundamental to interpreting and evaluating training policies, investment in people from the perspective of administrative capacity building: developing people skills structurally strengthens administrations.⁹

Linking staff training and administrative capacity building, investments in institutions capable of administering and organisations capable of learning through the development of human capital skills, means giving a framework of meaning and a strategic and systemic perspective to policy interventions. It means projecting the training needs identified at the individual and organisational level into the more general strategic need for capacity building.

Training of PA staff in the NRP

The (low) administrative capacity of Italian public administrations is both the starting point and the measure of the PNRR's results. Linking the theme of skills development with the more general one of strengthening administrative capacity, moreover, is useful insofar as it makes it possible to segment the complexity of public policy relative to training, facilitating the focusing of central questions (and hence the elaboration of preliminary answers) concerning, for example, the definition of needs, the planning of training demand, the orientation of training supply, its contents and actors.⁹

The reform of the public administration envisaged by the NRP moves from the requalification, in a new strategic perspective, of the policies for the management of public administration employees and of its main levers: new procedures and rules for recruiting personnel; revision of the tools for analysing skills needs; revision of promotion opportunities to senior management positions; activation

of training paths differentiated by target audience and identified on the basis of the actual detection of skills gaps with respect to strategic areas common to all employees or specific and professionalising ones.

The human capital of administrations thus returns to being the main intangible asset of public administrations and is directly related to the other resources of the new alphabet of public administration, namely good administration and digitalisation.¹⁰

This interpretative key has the merit of reaffirming, and making it even more explicit should the need still exist, the causal link between human resources, on the one hand, and the change objectives and innovation processes of administrations, on the other. The latter, in fact, in order to have a chance of success from the implementation point of view, cannot disregard the knowledge and active adherence of the stakeholders who are the actors and recipients, starting with the very staff of the administrations.

Entirely innovative is the perspective of training and, more generally, of interventions for the development of personnel skills, which can be deduced not only from the necessarily synthetic contents of the National Recovery and Residency Plan, but also from the programmatic lines of the Ministry for Public Administration and from one of the first acts of the Draghi government: the pact for innovation in public work and social cohesion signed on 10 March 2021. The pact is an agreement signed by the President of the Council of Ministers, the Minister of Public Administration and the general secretaries of Cisl, CGIL and UIL, which identifies the social issue in the creation of good jobs as the pillars of every reform and every public investment envisaged by the PNRR.

In the interpretation given by the Pact, later taken up by the PNRR, the construction of the new public administration is based on the entry of new generations of men and women workers and on the enhancement of people at work, including through professional growth and updating (reskilling) with constant, effective and continuous modernisation action to meet the challenges of digital transition and environmental sustainability. Among the many objectives of the pact, the promotion and development of human capital is of strategic importance. An objective to be achieved also starting from the recognition of the centrality of the lever of training, which must be of value for people and for the administration. In order to achieve these ambitious results, the pact for innovation in public work and social cohesion envisages the definition of a skills plan on which to build the planning of needs and the hiring of personnel, on the basis of a precise reconnaissance, taking into account the review of the professional profiles needed to accompany the transition towards innovation and the sustainability of all the activities of public administrations. At the same time, tools should be developed to recognise the qualifications, skills and abilities of staff already in service.

For the training and retraining of civil servants, this is a real paradigm shift. First of all, every civil servant must have a subjective right/duty to training. A right that public administrations must take it upon themselves to guarantee. This is also why

learning and training activities must to all intents and purposes be considered as work activities.

Secondly, training acquires the rank of a necessary organisational investment and constitutes a strategic variable that cannot be assimilated as a mere cost item in the context of public employment policies.

The possibility of translating these assertions into practice lies in the investments of the NRP: in fact, after a decade of freezing expenditure on training, there is a return to investing in people, their skills and careers. The plan allocates unprecedented investments of EUR 5.2 million, or 40.5 per cent of the resources on administrative capacity set out in the plan, to the training of public personnel. Furthermore, synergies between funding sources are envisaged: to the Plan's resources are to be added complementary resources amounting to 390 million euro relating to the 2021 National Operational Programme "Capacities for Cohesion", which aims at the systemic and transversal development of administrative capacity for the implementation of development and cohesion policies, focusing on the strategy of administrative regeneration and the strengthening of local administrations on issues such as human capital, organisation and processes, transversal tools, and knowledge sharing.

Residual, compared to these, but absolutely relevant and exceptional, are the financial resources from the state budget, amounting to 50 million euro already by 2022, earmarked with the aim of achieving full digital, ecological and administrative training of public administration employees.

Finally, it must be borne in mind that an annual quota of no less than 1 per cent of the total payroll of employees is routinely earmarked for financing training activities, as already established and described above. However, this is not only a quantitative aspect, which is also relevant. The deed of policy for the contractual renewal of the three-year period 2019–2021 for the personnel of the central functions sector, signed on 19 April 2021, which marked the start of the new contractual season for the civil service, devolves to collective bargaining the enhancement of training, guaranteeing all personnel access to specific training courses with reference also to IT and digital skills and advanced skills of a professional nature.

The most interesting fact, however, is that in the perspective of the National Recovery and Resiliency Plan the issue of skills development is directly related to that of administrative capacity, as is clear from the first implementing measures.

Public administration reform improves administrative capacity at central and local level: it strengthens the processes of selection, training and promotion of civil servants; it encourages the simplification and digitisation of administrative procedures. For this reason, too, this reform is qualified by the National Recovery and Resilience Plan as a horizontal (or contextual) reform, such as to bring about structural innovations in the system, of cross-cutting interest to all the missions of the plan, capable of improving equity, efficiency and competitiveness and, with them, the country's economic climate.

With specific reference to the issue of training, the plan envisages the activation of training courses differentiated by target audience, on transversal and specialised skills, to strengthen the administrations but also and above all to implement the plan's projects and interventions. To this end, it contemplates both a wide range of open and mass online courses (the so-called Moocs) and the introduction of skills communities.

The start of the declination of training measures is entrusted to the strategic plan for the enhancement and development of the human capital of the public administration "Re-forming the PA. Qualified people to qualify the country", launched by Public Administration Minister Renato Brunetta. In the Minister's words, this is the largest training plan for public employees ever carried out in the country's history, which will involve the entire universe of the 3.2 million public employees for the entire duration of the national recovery and residence plan.

The strategic plan indicates two main areas of intervention: the first concerns basic digital skills for civil servants, which are necessary for each employee to understand, accept and adopt new tools at their disposal, in order to be a promoter of innovation with a view to improving service, relations with citizens and the quality of their work.

The second area of intervention, implemented in cooperation with universities, pursues the objective of increasing the number of public employees with a university degree, enabling all civil servants to enrich their knowledge, thanks also to an economic incentive for access to degree courses, masters and specialisation courses of interest to the activities of public administrations.

Skills and training actors

Touted as a great opportunity for the country, for citizens' businesses, the NRP constitutes a great challenge for public administrations: to demonstrate and develop the capacity to seize the opportunities made available by the considerable resources that the European Union has earmarked for achieving the objective of territorial, economic and social cohesion, in the face of the crisis produced by COVID-19. From a managerial point of view, this is a real challenge, as demonstrated on the one hand by the number of complex projects to be operationally declined in order to invest financial resources; on the other hand, by the performance in terms of spending capacity, but also in terms of result capacity, of public administrations, which is far from exciting, in the management of European funds.

The capacity deficits in the management of interventions financed by cohesion policies, which are most evident in the design and implementation phases of interventions, but which also concern the aspect of strategic programming, sector planning, monitoring and ex post evaluation, largely derive from the general regulatory restrictions on recruitment that have lasted for two decades and concern many administrations, but are more accentuated in fragile contexts throughout the country.

The consequence of these deficits is the evident reduced speed of resource absorption, particularly for the larger and more complex programmes of the less developed regions in the last programming cycles.

The National Recovery and Residency Plan and the public administrations are united by a twofold link: on the one hand, the operational planning and implementation of the measures envisaged by the plan must be supported by adequate administrative capacity to ensure that the timeframe is met and the expected results are achieved; on the other hand, the country's revival depends on overcoming the structural criticalities of the Italian administrative system. The paradox is that precisely at a time when public institutions have shown, caught up in the pandemic crisis, all the limits of their capacity to solve collective problems, partly as a result of the low degree of coordination, poor planning capacity and lack of resources, they have been called upon to take on the role of pillar of the country's recovery project. The public administration reform envisaged by the NRP is assigned the task, among others, of creating the conditions for overcoming these critical issues, starting precisely with investment in the human capital of administrations.

The scale of the investments envisaged by the NRP makes, from the point of view of means, the lever of public personnel training, which is fundamental for the realisation of the modernisation objectives of the administrations and for increasing their capacity to respond to the needs of citizens, concretely and effectively operable. However, experience teaches us that the mere availability of financial resources, which, moreover, are not small, has not in the past produced the expected results in terms of strengthening the administrative capacity of public administrations. At least it has not produced them uniformly. The results achieved certainly depend on the policies and interventions put in place and on how these have been implemented and interacted with the often peculiar characteristics of the individual target administrations. However, the role of the implementing bodies and, as far as the public ones are concerned, their administrative capacity, is not secondary.

Key players in the design or implementation of training initiatives are the public institutions, starting once again with the National School of Administration (SNA)¹¹ and the training institutions at regional level. The SNA remains the main training centre for state managers and civil servants, with the aim of fostering professional growth and updating in support of the change processes in administrations. Its main targets are to strengthen the knowledge and skills of public personnel and, at the same time, to contain the phenomena of obsolescence of public human capital. But the SNA, and that is crucial in the perspective of the analysis considered here, is not only a training centre according to the law that established it: it has the more general purpose of supporting and promoting the process of innovation and reform of the public administration. Among its purposes are those of promoting and disseminating the culture of public administration effectiveness and efficiency and of promoting and disseminating technological and process innovation in the services provided by the public administration.

The SNA, therefore, is conceived as an instrument of transformation: it does not only aim at transferring ideas, knowledge and consolidated experience to the youngest officials or, for officials to the longest serving managers, to take care of the maintenance and periodic updating of a culture previously acquired by them. It must be a place for the continuous renewal of administrative culture or, better, a place for the elaboration, promotion and dissemination of an administrative culture that is constantly open to innovation, change and reform. In this perspective, the contribution that the School can offer administrations does not only concern the provision of training for the development of individual skills: it must extend to the design of contents, professional figures, training priorities, training delivery methods in relation to objectives and recipients and, more generally, the conditions that transform individual knowledge into administrative capacity.

In the wide range of training providers for public administrations, universities play an important role: in fact, there are numerous experiences of collaboration between administrations and universities in the field of skills development of public personnel. However, in the strategic perspective of the NRP investments, it is necessary for this collaboration to become systemic and structured, more organic and less extemporaneous. In fact, it is not only a matter of better focusing and communicating the educational offer already available (degree courses, master's courses, specialisation courses, doctorates), which must also be the subject of a punctual reconnaissance and a specific assessment in terms of usability and usefulness in relation to the training objectives and needs of administrations and their staff. In this perspective, for example, the memorandum of understanding signed on 15 October 2021 between the Ministry for Public Administration and the Ministry for Universities and Research provides, of reference to PhDs, for the monitoring and census of the PhD courses currently activated, in order to create a database of public administrations. However, there is a need for universities to be incentivised to set up degree courses that correspond to the training needs of administrations and not to their capacities or requirements.

In addition to the subjects identified above, a fundamental role for the development of human capital in the perspective of administrative capacity building is played by the national centres of competence: this refers to administrations and public subjects identified by virtue of their expertise in a specific thematic area (e.g. digitalisation, administrative simplification, etc.) capable of providing information, data, processing and technical-scientific contributions and, more generally, of supporting and sustaining change interventions by other administrations. The use of national centres of competence, for example, has been identified by the Department of the Civil Service as the preferred method for implementing administrative capacity building interventions financed under the 2014–2020 NOP Governance and Institutional Capacity.

The involvement of other training agencies, called upon by the administrations to intervene in a complementary manner with respect to the training schools, whether national or regional, or to which they themselves may turn in a comple-

mentary function to activities directly organised and managed by them, is unavoidable. This means that training and skills development measures for civil servants require strategic coordination of all the main players involved with the aim of creating a major hub for the growth of human capital in the public administration. After all, there is a large training market for civil servants, made up of generalist and technical-specialist training companies. It is necessary, however, that the latter does not take on the features of a wild market, but rather a market that is firmly governed and regulated by public bodies.

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² Bianco, A.–Di Filippo, A.–Laezza, M.: *La gestione del personale negli enti locali*, Maggioli, 2000.

³ Natalini, A.: *Il tempo delle riforme amministrative*, Il Mulino, 2006.

⁴ Ministro per la funzione pubblica, Direttiva 13 Dicembre 2001. *Formazione e valorizzazione del personale delle pubbliche amministrazioni*, 2001.

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⁶ Presidenza del Consiglio dei Ministri, Ministro per la Pubblica Amministrazione e l'innovazione, "Linee programmatiche sulla riforma della Pubblica Amministrazione - Piano industriale", Roma, 28 maggio 2008, pubblicato sul sito di Astrid alla pagina: http://www.astrid-online.it/Riforma-de/Documenti/Linee-programmatiche-RIFORMA-PA_piano-industriale-28_05_08.ppt

⁷ Agus, D.–Argiolas, B.–Ciccarelli, G.–Cimino, B.–D'Alterio, E.–Giurickovic–Dato, A.–Mattarella, B. G.–Rivellini, G.–Screpanti, S.–Tonetti, A.: *La gestione del personale tra incentivi e disincentivi*, in AA.VV., *La riforma della pubblica amministrazione: problemi e proposte*. RIDP, 4, 2021.

⁸ Bandera S., Donzelli P., & Labriola T. *Programmazione dell'offerta formativa, revisione dei processi e nuovo modello organizzativo della formazione*, in Presidenza del Consiglio dei Ministri, Scuola Nazionale dell'Amministrazione, *Formare la PA. Rapporto SNA 2017–2020*. Roma, 2021.

⁹ Piano nazionale di ripresa e resilienza (abbrev. PNRR), in www.governo.it, 23. 04. 2021.

¹⁰ Iacono, G., *E-leadership. Come guidare la trasformazione (digitale) della PA*, Franco Angeli, 2021.

¹¹ Battini S., *Introduzione*, in Presidenza del Consiglio dei Ministri, Scuola Nazionale dell'Amministrazione, *Formare la PA. Rapporto SNA 2017–2020*, Roma, 2021.

sidering the differences between the conditions, situations, and needs of women and men in all Community policies and actions (COM(96) 67 final). This evolution, although appreciated from the perspective of its great potential to generate substantial transformations, has not been devoid of critical analysis, which has brought to light the fact that this gender mainstreaming EU strategy was supported mainly by ‘soft’¹ rather than ‘hard’ law interventions, by norms that were primarily advisory rather than judicially enforceable (Walby 2004; Beveridge 2012).

Nevertheless, gender mainstreaming remains a strategy undergoing continuous consolidation, even if, for some, the progress may seem too slow. Conducting a retrospective analysis of the first 20 years of gender mainstreaming in the EU, Hubert and Stratigaki (2016) demonstrate the resilience of this concept. Even in challenging contexts, such as the 2008 economic crisis and the 2004 EU enlargement to include Central East European states, which both entailed severe budgetary restrictions and administrative reforms for gender equality policies, this resilience persists in the face of vocal conservative opposition in the background. The recent Covid-19 health crisis has also tested the resilience of gender mainstreaming. Anna Elomäki and Johanna Kantola (2021) give relevant arguments to support the fact that feminist governance (operationalised as dedicated gender equality bodies and gender mainstreaming and including civil society advocacy networks) in the European Parliament was successful in inserting a gender perspective into the COVID-19 response. Also, the field’s latest ‘hard’ law evolutions can be identified in the Structural Funds 2021–2027, the Inter-institutional agreement on the Multi-annual Financial Framework and standard budgetary procedures, Common Provisions Regulation (EU) 2021/1060 Art. 9.2 Horizontal Principles but also in the Next Generation EU package 2021: the Recovery and Resilience Regulation (EU) 2021/241 Art. 16.2. a) and 18.4. o) and The Technical Support Instrument Regulation (EU) 2021/240 Art. 5 a)² 8 d) and 14.2). These developments reinforce the significance of gender mainstreaming from the perspective of the necessity for gender analysis, gender impact assessment, gender budgeting, and consideration of gender impacts in policy-making.

Therefore, we have reasons to believe that gender mainstreaming (GM) will continue its consolidation process for several reasons: the potential transition from soft to hard laws or the only by soft due the fact that the effectiveness of GM is supported not only by the institutional (formal/hard) conditions but also by the soft ones (Beveridge 2012); the important influence of actors (the velvet triangles – feminist civil society, academia, and politicians, Woodward 2004) who work and collaborate behind the scenes and across political group lines can be decisive (Elomäki–Kantola 2021); the presence of a strong legal and policy framework for gender equality, resting on the foundation of gender mainstreaming (see Art. 2 and Art. 3.2 TUE) (Hubert–Stratigaki 2016); the financial incentives linked to the implementation of GM in national public policies. This is because “when GM is linked to eligibility for EU funding, its impact has to be acknowledged, evaluated, and credited to EU policies” (Hubert–Stratigaki 2016: 32).

From values to conditionality and tracking, from EU to Romania

This more in-depth understanding of the continuum between soft and hard in attaining gender equality takes us to the links between the EU policy framework in the field of gender equality and the ones of the member states (MS), which are acknowledged as moving at different speeds to a more just gender world. In addition to the EU gender equality acquis, which is directly implemented in the Member States, recent developments also involve the EU conditioning access to its key research and innovation funding program (Horizon Europe – €95.5 billion). This is achieved by mainstreaming gender into the institutional processes and outcomes (the gender equality plans) of certain organisations that are eligible to apply for funding.³ Also, the EU's last gender equality strategy "includes specific *enabling conditions*, requiring a Member State to have in place a national gender equality strategic framework as a precondition to make use of the funds when investing in improving gender balance in the labour market, work-life balance or childcare infrastructure." (COM(2020) 152 final: 16).

Concurrent with these developments and the necessity for transparent financial management, the EU and other international actors⁴ have progressively established methods for acknowledging, evaluating, and measuring the commitment of various stakeholders (including Member States) to using GM tools in policy design. These methods encompass tracking methodologies or markers such as the humanitarian Gender-Age Marker and the Public Expenditure and Financial Accountability Gender Equality Tracking Methodology.

Despite the consolidation of hard legislation and financial incentives at the EU level, Romania has shown little interest in implementing gender equality reforms, resulting in a consistent second-to-last ranking on the European Gender Equality Index. Further examination is necessary to evaluate Romania's actual implementation of gender public policy designs and to determine its commitment to gender as a relevant variable. To this respect, this paper analyses Romania's current strategic governmental planning (55 approved strategies) through document analysis using the OECD's qualitative tracking methodology presented below.⁵ I consider the chosen methodology the most useful in the context of the assumption that Romania implements few aspects of gender mainstreaming, and the OECD criteria for the three categories of the marker (0, 1, and 2) offer detailed minimum criteria. In the study I also examined intersections and whether gender equality is a fundamental principle in the strategic document.

Score 0 Not targeted	The project/program has been screened against the marker but has not been found to target gender equality.	
Score 1 Significant/ Gender mainstreaming	Agender analysis of the project/programme has been conducted;	Yes
	Findings from this gender analysis have informed the design of the project/programme;	Yes
	Presence of at least one explicit gender equality objective backed by at least one gender-specific indicator;	Yes
	Data and indicators are disaggregated by sex where applicable;	Yes
	Commitment to monitor and report on the gender equality results achieved by the project in the evaluation phase.	Yes
Score 2 Principal/ Specific gender equality policies	A gender analysis of the project/programme has been conducted.	Yes
	Findings from this gender analysis have informed the design	Yes
	The top-level ambition of the project/programme is to advance gender equality and/or women’s empowerment.	Yes
	The results framework measures progress towards the project/programme’s gender equality objectives through gender-specific indicators to track outcomes/impact.	Yes
	Data and indicators are disaggregated by sex where applicable.	Yes
	Commitment to monitor and report on the gender equality results achieved by the project in the evaluation phase.	Yes

Source: OECD–DAC NETWORK ON GENDER EQUALITY (GENDERNET) • DECEMBER 2016

The Romanian strategic planning: (un)committed to gender equality?

Before presenting the research results, it is crucial to emphasise that gender equality policies in Romania are primarily regulated by Law 202/2002 on Equal Opportunities between Women and Men. Among other measures, the law provides a legal basis for positive action as well as gender mainstreaming (art.1, art. 23 d). In this regard, the national authority in this field (A.N.E.S.) is responsible for actively integrating the gender perspective into all national policies and programs. Additionally, the data presented in the following pages are collected based on the strategies officially listed by the General Secretary of the Romanian Government from January to the beginning of March 2023,⁶ namely 55 documents.

Gender equality as a fundamental principle and intersections

The decision to examine if gender equality was adopted as a fundamental principle in the strategies was based on two reasons. First, according to Beveridge (2012: 29), soft patterns can guide behaviour. Secondly, the Romanian Government issued a methodology for developing national strategies that include basic principles such as transparency, responsibility, and evidence-based reasoning (HG nr.379/23.03.2022). Therefore, if gender equality is adopted as a fundamental principle, it may be further operationalised in a mainstreaming approach or acknowledged through a gender perspective? What does the data reveal? On the one hand, only six of the 55 strategies explicitly state gender equality as a fundamental principle, while four others refer to non-discrimination, equal treatment, or equal opportunities. It is also worth noting that among the six strategies asserting gender equality as a fundamental principle, two are specific gender equality policies, rendering them somewhat redundant. The remaining four strategies pertain to immigration, disability, Roma people inclusion, and seismic risk reduction.

Does declaring gender equality as a fundamental principle correlate with a score of 1 or 2 in the OECD–DAC tracking methodology? The answer is rather negative. Only two of the four assessed strategies scored 1 (Roma and disability), while the other two scored 0 (immigration and seismic risk). The immigration strategy registers NO for gender analysis, gender design, gender-disaggregated data, and monitoring and reporting, with a mild/permissive YES for gender-connected sub-objective (B.4). The seismic risk strategy has a score of 0 (with none of the criteria checked) and no intersections, which suggests it is entirely gender-blind. This outcome is paradoxical and may be interpreted as a result of mimetic copy-pasting during the elaboration process. Furthermore, as the subsequent analysis will demonstrate, there are three other strategies (HIV, sustainable development, and workforce occupation) that scored 1 (indicating gender mainstreaming) but did not declare gender equality as a fundamental principle.

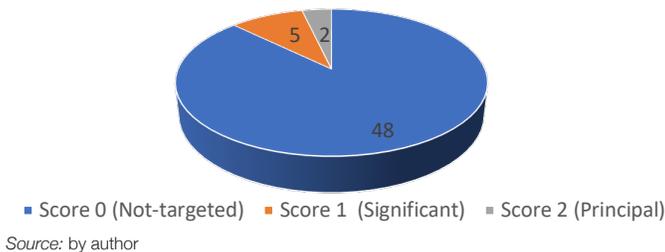
When examining intersections, some clarifications regarding the methodology employed are necessary. Specifically, when counting intersections, I excluded those deemed default intersections. For example, in the Roma people strategy, ethnicity is not considered an intersection because it is inherently embedded within the core of the strategy. Similarly, in the long-term care and active aging 2023–2030 strategy, age is not treated as an intersection, and so on. In this context, 11 of the 55 strategic documents analysed refer to intersections between gender and other categories. The most common intersections involve age (10 instances), disability (4 instances), and residence (rural) (4 instances). Conversely, sexual orientation and religion are mentioned only once as intersecting with gender. Age intersects with gender primarily from the perspective of women's traditional reproductive roles⁷ and concerning human trafficking and violence against women. Apart from the two dedicated strategies⁸, references to intersectional inequalities can be found in the Roma people inclusion strategy (age, disability, residence), the social inclu-

sion and poverty reduction strategy (disability, age, ethnicity), and the sustainable development strategy (ethnicity, religion, sexual orientation, disability, age), as one would expect.

Gender equality – not-targeted in the Romanian strategic planning

Out of the 55 strategies analysed, only 5 scored 1, indicating that gender equality is a significant and intentional objective but not the primary reason for undertaking the project or program. Furthermore, the project or program is designed to have a positive impact on promoting gender equality and/or the empowerment of women and girls, reducing gender discrimination or inequalities, or addressing gender-specific needs (OECD–DAC NETWORK ON GENDER EQUALITY 2016). As expected, the two dedicated strategies previously mentioned scored 2, while the remaining 48 strategies are either gender-blind and/or do not target gender equality.

Tracking for Gender Equality (OECD methodology - DAC marker)



In light of these findings, it is essential to mention all five strategies that scored 1: the HIV strategy, the sustainable development strategy, the workforce occupation strategy, the disability strategy, and the Roma people strategy. Concerning correlations, it is worth noting that a score of 1 directly correlates with an intersectional perspective but not with the assertion of gender equality as a fundamental principle. Specifically, all five strategies that scored 1 included references to gender and other intersecting vulnerabilities, but not all declared gender equality as a fundamental principle.

Finally, we must also closely examine the strategies that scored 0 on the OECD–DAC methodology, indicating that they failed to meet the minimum criteria for gender analysis and mainstreaming. Out of the 48 strategies analysed, 24 are entirely gender-blind and lack any consideration of gender in their design. For some of those 24 strategies, gender blindness can hardly be explained, such as in the case of the Cybersecurity Strategy, even though the Romanian legislation regarding domestic violence in correlation with the Istanbul Convention provisions regulates cyber violence.

Another example is the National Strategy for preventing and combating anti-Semitism, xenophobia, radicalisation and hate speech, which is also gender blind despite being developed in consultation with public authorities designated as equality bodies, such as the National Council for Combating Discrimination and the Ombudsman. In line with the previous argument, it is worth noting that the multi-year strategy for the development of human resources in health services, a field well-known for being feminised, is entirely blind to gender considerations. Although the strategy covers the implementation period of 2022–2030, which coincided with the pandemic, widely regarded as a gendered crisis, none of the extensive data on healthcare and gender was deemed relevant to the strategy. Similarly, the Anti-Covid strategy is unsurprisingly devoid of consideration for gender issues. However, it would be expected that some strategies to have a gender perspective due to their subject matter, such as the National Strategy Against Organized Crime, which addresses issues like human trafficking, sexual exploitation, migration, and cybercrime. The strategy is addressing even the lover-boy phenomenon, but not correlated with gender (*sic!*). Nevertheless, there is no reference to women's specific vulnerabilities in these areas, while for instance minor victims are identified in several occasions (more than 10 mentions in the text).

The second issue concerns the presence of sexist and biased remarks that persist in official documents, such as The National Probation System Strategy, which identifies the gender structure of graduates as a factor that could negatively impact staff stability due to maternity leaves and employment suspensions. The HIV strategy, scoring 1 in gender mainstreaming, exhibits gender bias by targeting pregnant HIV-positive women and emphasising the childbearing age of the "female population infected with HIV." The strategy's gender equality objective aims to prevent the spread of sexually transmitted diseases by providing medical devices and counselling to persons practising commercial sex, primarily women, without first aiming to empower/protect them. See also the intersection with age from the perspective of traditional reproductive roles.

Thirdly, some strategies have undergone relevant gender analysis, which is not reflected in the policy design or objectives. For instance, the National Strategy for Social Inclusion and Poverty Reduction identifies gender inequalities in employment rates, women's risk of poverty and social exclusion, the feminisation of poverty, part-time work, women's education, women's access to health, and domestic violence. Men are often the aggressors in these cases. Similarly, the National Strategy on Long-Term Care and Active Aging acknowledges gender inequalities, such as the higher vulnerability of women with dementia, women's lower workforce participation rates, women employed in care roles, and the feminisation of household care. Finally, the Human Trafficking National Strategy highlights women's vulnerability to sexual exploitation on 12 occasions, but no specific objectives or measures are related. However, some of the objectives are mentioning minor victims as a targeted particular group, but not doing the same for women victims.

Conclusions

Unfortunately, the analysis of the assumed strategic planning framework confirms Romania's mild commitment to promoting gender equality. Although Romania has two dedicated strategies in this field, only 5 out of 55 strategies met the minimum criteria set by the OECD–DAC tracking methodology for score 1 – gender mainstreaming. How can we explain this situation, considering that the EU has promoted gender gender mainstreaming since the mid-1990s? One possible explanation brings up the distinction between hard and soft approaches, meaning that as long as the EU does not impose gender equality as a priority, Romania does not consider it a priority either. However, gender mainstreaming is still not assumed as a directive (hard law), and recent consolidation processes at the hard law level suggest that, in the future, we will be obliged to do more gender mainstreaming. Therefore, the question remains: how do we explain the situation in Romania? While in a sea of gender blindness, copy-pasting or lack of correlation between diagnosis and treatment (measures), five strategies still integrate the gender perspective. One possible answer could be related to how Beveridge (2012) argues that soft measures still work, but further research is needed to see how. Another possible answer may be related to elements that could be conjunctural, such as the insular existence of experts “to guide soft processes such as gender mainstreaming” Beveridge (2012: 42), feminist organisations present in the consultation process, and even political decision-makers (perhaps femocrats?) who contributed to the drafting of strategies. So, a deeper analysis of the formal and informal processes of elaborating these strategies (actors involved, decision-making and consultation processes) is necessary to identify the factors that have contributed to the integration of the gender perspective and which, if conjectural, may be institutionalised.

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¹ See The European Resolution on Gender Mainstreaming 2003, The provisions on gender mainstreaming of Treaty on the functioning of the EU 2007, The EU Charter of Fundamental Rights. art 23 – 2010, EU Resource Package on Gender Mainstreaming in EU Development Cooperation (2015), Gender Action Plans for External Actions (foreign policy) (1st 2010–2015; 2nd 2016–2020; 3rd 2021–2025), EU Action Plan on Women, Peace and Security (WPS) 2019–2024, EU Gender Equality Strategy 2020–2025.

² Public financial and asset management, budget process, including green and gender budgeting, macro-fiscal framework, debt and cash management, expenditure and tax policy, tax compliance, revenue administration and customs union, as well as fighting aggressive tax planning, tax fraud, tax evasion and tax avoidance.

³ Public bodies, such as research funding bodies, national ministries or other public authorities, including public-for-profit organizations; Higher education establishments, public and private; Research organisations, public and private.

■ CHANGING THE PATH

⁴ That work together in promoting gender equality – the UN, OECD;

⁵ The E.U in the REGULATION (EU) 2021/1060 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL is sets a three code quantitative methodology for assessing gender equality, but it also recommends the use of the OECD qualitative tracking methodology which is based on the use of a gender equality policy marker. The OECD Development Assistance Committee gender equality policy marker is also a key monitoring and accountability tool also in the context of the 2030 agenda SDG 5 which is asumed as a commitment in the EU in its last strategic plan adopted (COM(2020) 152 final: 2).

⁶ Strategies on field of intervention, The General Secretary of Romanian Govern, accessed between 25 February and 14 March 2023. <https://sgg.gov.ro/1/strategy-unit-unitatea-de-coordonare-a-strategiilor/>



Photo/Iván Halász

INTELLECTUAL ORIGINS OF PUTINISM AS RUSSIA'S STATE IDEOLOGY

Nicolescu Valentin Quintus

Introduction

■ There are two conflicting views on the Russian-Ukrainian war: a Western one, reflecting the current international order, based on international law and the principles of the U.N., and a Russian one, based on a deeply ideological understanding of international (geo)politics and a particular interpretation of recent Russian history, centered around a neo-imperial ethno-culturalist concept of a Russian World. The first one calls the war an invasion of a sovereign state, while the latter defines the conflict as a “special military operation”. The first one talks of international war, the second one talks of an internal civil war. The Russian justification for military intervention in Ukraine has meanwhile morphed from an inward-looking ideological assessment of the post-soviet turbulent history and implicit Russian aspirations for the future into a rallying cry against the post-Cold War US dominated international order that apparently coagulated a global coalition of revisionist states, from Belarus, Iran, Syria or Nicaragua to the People’s Republic of China and North Korea. It appears that we’re witnessing an ongoing challenge to the established power and institutional international order (AFP, 2023). The following pages are not an attempt to discuss the current global power struggle, but rather an investigation of the ‘prime motor’ of this development, by exploring the origins, dimensions and subsequent evolutions of Russian state ideology after the fall of the Soviet Union in 1991. In order to achieve this, I aim to explore the historical process of nation building in Russia and its impact on shaping state ideology during the Putin era.

To this respect, I am planning to argue for a reassessment of current understandings of Russia's political regime and ideology, by abandoning the simplistic view of an authoritarian regime dominated by a strong man figure using a simulacrum of ideology to legitimate his position and political decisions, and to place Putinism into perspective, as an organic development of a mainly pre-Soviet era Russian ideological and collective identity discourse.

A diachronic approach – the Russian nation building project, continuity and change

“The mistake we have been making for many decades is that we have still not admitted to ourselves that since the time of Peter the Great and Catherine there has been no such thing as Russia: there has been only the Empire” (Sergei Vitte 1909–10, in Hosking and Service 1998: 1)

In the Russian language the word *natsiia* (nation) is seldom used outside social sciences specialists' circles. George Hosking notes that, when speaking of themselves, Russians use three words, each one having a distinct meaning, describing a specific aspect or dimension of Russian nationhood – *Russkii*, *Rossiiskii* and *narod*. The first one refers simultaneously to the people, the language and the culture, the second relates to the statehood and the Russian empire, while the latter means simply the people. Consequently, Hosking concludes that, at least from a linguistic standpoint, the Russians “are not really a nation and that their ethnic and cultural identity is distinct from their political one” (Hosking in Hosking and Service, 1998: 2). Larouelle–Grek–Davydov (2023: 3) tried to identify the semantic space in which *Russkii* and *Rossiiskii* are deployed in contemporary Russia by examining datasets provided by the Russian Presidential Administration, president Putin's speeches and also by the debates held in the Russian parliament, the Duma. Their findings seem to suggest that there can be identified a trend of culturalizing the political national identity which the authors don't necessarily see as a marker of ethnonationalism, but rather as an intersection between global trends of consolidating authoritarian regimes and the culturalization of citizenship which is present not only in Russia but also in the European Union.

In my view, the terminological confusion regarding the Russian collective identity reflects – quite differently from their European counterparts – a historical reality built around three main instances – the ruling class, the intelligentsia and the society at large, the people. Throughout time, they found themselves often disconnected or sometimes in conflict vis-à-vis Russia's right path of political, social, economic or cultural development. Moreover, these three groups constituted, for lack of a better term, three distinct realities within Russian society, fact that would prove to have an immense effect on Russia's nation building process to this day. The dynamic between these realities within the broader political framework of an expansionist empire historically shaped the efforts towards nation building

and, frankly, also marked its relative failure, consequently impacting the way in which today's Russian state ideology approaches nation, culture and identity in its attempt to construct a stable polity.

The fourth relevant ingredient to this mix is represented by the Russian Orthodox Church, which throughout history, by adopting the byzantine principle of *symphonia* (Antonov 2020) and codifying it in the *Stoglav* of 1551 (Kollmann 1980), managed to support the monarchy while at the same time trying to push its own political agenda. After the fall of the USSR, the Orthodox Church reassessed in 2000 its theological and social principles by returning to the Russian national-religious renaissance envisioned by the Slavophiles and other religious thinkers of the 19th century (Arola–Saarinen 2002). During the Putin era, the Church found again its central place as a powerful actor in the Russian political order and, as in the pre-Soviet era, became once more a legitimizing force for the regime. Moreover, after the 2009 enthronement of the current patriarch Kirill, another theme was added to the Russian Orthodox public discourse – the apocalyptic end of times, caused by the decadent and corrupt West (Agadjanian 2017), an issue that not only fits well within the overall discursive framework of Russian state ideology (eg by actively demonizing civil society actors such as the NGO's for promoting 'corrupt' or decadent Western values), but, in my view, also plays a particularly dangerous role in the current context of the Ukrainian war, legitimizing Putin's recurring nuclear threats.

The Ruling elites and the production of ideology in Russia

First, the ruling class, during the pre-soviet times, comprised two elements – the imperial family and the landed aristocracy. The absolute monarchy was shaped around the concept of autocracy, which in actuality represented much more than the power of a Western absolute monarch. The Russian Czar had “undiminished and undiluted exercise of the power of the sovereign”, as Stephen Lee (2006: 1) puts it. Unlike its Western counterparts, the Russian monarch had total and arbitrary power of taxation, was the source of law (also being above it), and retained power of life and death over all his subjects (Henshall 2013: 170). Even after the 1905 revolution the monarch retained the ultimate authority to supersede the power of the law (Rabow-Edling 2006a: 2). The autocratic hyper-centralizing hold on power and the emerging bureaucratic-administrative complex were seen, even by some of the staunchest critics of state power in the 19th century, as assuring the necessary control and coherence of an immense empire that was in dire need of a unifying force. Also, by resting initially on two main pillars – loyalty to the czar and faith in the Orthodox church, it also assured, albeit in a limed way, some sort of an identity for the diverse peoples inhabiting the Russian empire. In 1832, Count Sergey Uvarov, at the time minister of education wrote a report on education where, amongst other things, under the impression of recent nation-

alistic uprisings in the empire's western provinces, coined the official ideological national doctrine of the czarist regime under the slogan "Autocracy-Orthodoxy-Nationality", which he saw as the central elements that distinguished Russia from the corrupt Western ideas and practices. Almost two centuries later, Vladimir Putin would literally reformulate the imperial slogan and try to reapply it to the Post-Soviet Russian society in a new formula that reflected the same age-old ideas – the vertical of power (as a centralizing force) and the principle of rule by the law (as an alternative to the Western concept of the rule of law, which in my view reframes the imperial autocratic and personalistic principle of arbitrary rule from above the law, but by the law), orthodoxism (as an unifying culturalist discourse) and the concept of *Russkiy Mir* (as a vision of imperial national identity opposing Western aggression, corruption and hegemonic ideologies).

After the enactment in 1722 of Peter the Great's Table of Ranks (*Tabel' o rangakh*), the old landed nobility was replaced by a more diverse class of small service gentry of bureaucrats, military and navy men that ensured hereditary nobility to people of ordinary origins and thus a vertical mobility that would eventually contribute to a more dynamic at the same time loyal Russian elite which was tightly controlled from above by the imperial family (Kollmann 2017: 427). It's relevant to note here the fact that this system put in place by Peter the Great proved to be so successful (in Russian terms, off course) that it was kept in place until the 1917 revolution. Moreover, after the Bolshevik takeover it was replaced with something eerily similar – the nomenklatura (see Rigby 1988: 523), while the role of the czar as an all-powerful arbitrary ruler controlling the access and the mobility within this new class was taken by the Party's General Secretary and the Politburo. After the fall of the USSR, many of the former members of the communist ruling elite shifted from power to property, making the transition from Soviet apparatchiks, managers and state bureaucrats to Russia's new political and economic ruling class (Kryshtanovskaya–White 1996), of which Vladimir Putin himself is an example. Moreover, after getting to power, Putin reinstated the long tradition of recruiting the political and business elite from the ranks of the bureaucrats in the state administration (Huskey in Fortescue 2010: 185).

Returning to the imperial era, the new nobility proved to be both a blessing and a curse for the czarist regime. Not once, but many times members of this new noble class of bureaucrats and military men conspired to overthrow the regime or to assassinate the czar, usually inspired by the Western-imported ideas and practices first brought into Russia by Peter I. Perhaps the most well-known is the case of the Decembrist conspiracy, which later became one of the recurring Russian political myths (Trigos 2009), usually linked in part to the intelligentsia's aspirations towards a civic-republican Western-inspired Russian nation and state (see Rabow-Edling 2006b).

The intelligentsia and the Russian Exceptionalism

From this new nobility emerged the class of intellectuals, the intelligentsia (see Raeff 1966: 3) which had to play – in the Russian context – both the role of an intellectual elite and that of an emerging civil society. These were a relatively small group within Russian society, a ‘revolutionary subculture’, as P. Pomper called it (Pomper 1993: 3), mainly comprising men of letters, former civil servants, petty nobility, teachers and so forth who “saw themselves as separated and alienated from the rest of society due to their higher level of education and the progressive ideology they subscribed to” (Kochetkova 2010: 12). To this definition I would make just one small amendment – the intelligentsia was not of one ideological persuasion, but many. Both Slavophiles and Westernizers were part of the intelligentsia, sharing similar aristocratic origins, similarly isolated in their crystal towers of ideas and doctrinal debates, although they embraced opposite worldviews and imagined the Russian national identity in very different terms. The Westerners were nobles and bureaucrats who were sent by the state to obtain their education in the West (Raeff 1966: 145), and they were aiming to profoundly change Russian politics, culture and society by adopting a modernizing, Western-inspired strategy that would have transformed the empire into a liberal (in terms of the 19th Century Western liberal theory) polity, and embracing a civic-institutionalist view of nationhood. Apart from this Decembrist tradition perhaps best embodied by Pavel Pestel’s constitutional project (see O’Meara 2003), the Westerners were split amongst themselves in a variety of currents and sub-currents often at odds with each other (see Walicki 2015), from moderate liberals to religious Westernists, nihilists, populists or Marxists.

On the other hand, starting from the 3rd decade of the 19th century, the Slavophiles adopted a culturalist view on the national project, heavily influenced by the German romantic thought (Larouelle 2009: 14). They were, nevertheless, akin to their Westernist counterparts in their diversity of views regarding Russia’s future. The main tenet of the Slavophile’s political thought was the historical and cultural differences between Russia and the West indicated not only Russia’s radically different nature in both society, culture and history, but also that these differences were granting Russia a position of superiority vis-à-vis the West (Hamburg–Poole 2010: 27).

Slavophiles saw the Russian Orthodox Church and faith as one of the central pillars of Russian identity, one that could and should be used in the edification of the nation. Their answer to the Westernizers was to reshape the idea of the West as a threat to a Russian soul that defined not the nation, but the community within the empire. They strongly rejected the practice of imitation of Western ideas and practices, and thus engaged on a path of discovery and construction of the Russian fundamental elements around which the nation should be built. Thus, they imagined a Russian enlightenment (*prosveshchenie*) that would not be just borrowing the Western ideas, but an original Russian phenomenon that would “evolve

as a result of national regeneration would reveal Russia's role in universal history, and thereby furnish her distinctiveness with common meaning" (Rabow-Edling 2006a: 86). To this respect, Slavophiles like Ivan Kireevsky and Aleksei Khomiakov looked deep into Russian history and found the much-needed alternative to Western individualism, egoism and rationalism – Russia's own form of social evolution was in their eyes to be found within the Christian Orthodox faith, more specifically in the principle of conciliarism (*sobornost*) (Walicki 2015: 170; Ware 2011). What is interesting about the Slavophile ideas on nation and nation building is that they did not view the Russian identity neither in civic, nor in ethnic terms. For them, the imperial-national identity would have been built not around institutions or ethnicity, but around a shared morality and ethical principles (Hughes 2000). Nevertheless, it is very important to note that the core values and principles on which the Slavophile school of thought built their idea of Russian identity were implicitly seen as countering a Western philosophical and ideological threat. This reactive stance originates the 'Western existential threat' narrative still present in contemporary Russian society and culture (Galeotti 2019; Blachford 2020) that currently stands as one of the cornerstones of Putinism as state ideology, along with the Orthodox anti-Western paranoid and apocalyptic discourse professed by the Russian Orthodox Church.

The overwhelming diversity of political positions and debates within the intelligentsia during the 19th century is a tribute to the Russian intellectual milieu of the era, but had literally no impact on the society at large, being contained within the elitist circles of the nobility. This represents one of the markers of the failure of the national project in pre-communist Russia, underlying the disconnection between the autocratic power of the czar, the bureaucratic-administrative system, the intellectual elite and the people. After 1917, the term intelligentsia changed its meaning, referring to the white-collar workers created during the industrialization process (Kochetkova 2010: 12), but nevertheless still implying higher education and the fact that they had jobs requiring such a degree. The main difference though, consisted in the nature of their occupations – if the traditional intelligentsia worked in the administration, state bureaucracy, the military or were members of the Orthodox Church, now they could also be coming from managerial positions, the educational system itself and so forth. And, just as during the imperial period, the intelligentsia was frequently required to exist and operate in a more or less covert manner, in order to avoid the Soveit state's prying eyes. During the post-soviet era, the intelligentsia resurfaced and regain its leading ideological role as a civil society actor, and its most significant contribution to Putinism was the way in which it reignited the discussion regarding nation and nation building in Russia, at the same time reasserting the historical imperial Russian identity around the concept of Russian World (*Russkiy Mir*) which it partly borrowed from the 19th century Slavophiles (Laruelle 2015) and which constitutes one of the main ideological arguments for the invasion of Ukraine in the winter of 2022.

The People and the construction of a Russian identity

Last but not least, the majority of the people living in the Russian Empire were themselves a world apart from the other strata of society. Prior to the 1861 emancipation of the serfs by Alexander II, three quarters of the population of the empire was in serfdom, either to the nobles or to the state (Moon 2014). The Russian empire lacked a well-developed educational system, and the existing one was often the site of tensions between popular demands and the idealized views of the elite regarding of what the peasant should be and know (Eklof 1984: 562). As an example, the census of 1897 shows that only 30.1% of the populace was literate (Mironov 1991: 240). Moreover, the multiethnic, religiously diverse imperial realm provided another challenge to the would-be educators of 'the people', through the various pre-existing religious educational institutions (such is the case of the Islamic schools present throughout Central Asia for example) that were a commonplace amongst the non-Russian population and that had no incentive of disseminating the state-sponsored identity discourse in their communities (Frank 2012). On the other hand, religion and church were definitory for their civil status and cultural identity, thus – amongst other things – reinforcing the relation between political and religious authority. These facts taken into account, it clearly appears that when the minister of education, Sergey Ulianov coined the imperial nationalist credo in the first half of the 19th century – Autocracy, Orthodoxy, Nationality – the formula was nothing but empty words, or at best an ideological statement used by the Czar Nicholas I for propaganda purposes and nothing less in the wake of the nationalist uprisings in the Polish provinces during the early 1830's (Engelstein 2009: 193). Until the end of the century, when the education system was reformed such projects were more or less just statements of intention, a matter of debate amongst the ruling classes. The Russification (understood as imposing the Russian culture, language and institutions as the dominant ethno-cultural identity) of the people of the empire was never an achievable goal for the administration in terms of concrete policy, the same 1897 census showing that ethnic Russians (defined in terms of language) were only 44% of the populace. What was possible was using of the Church (which had the necessary infrastructure in place, so to speak) as an instrument of integration through conversion and to increase people's loyalty to the empire and the czar as the autocrat and the head of the Orthodox Church (Rodkiwicz 1998: 10). During the last decades of the 19th centuries up to the 1917 revolution this strategy was doubled by an increased imperial nationalistic rhetoric focused on Russian ethnicity constructed with a healthy dose of Slavophile exceptionalism.

Conclusions

Contemporary Russian state ideology clearly can be placed within a broader historical framework, from which it organically evolved, reflecting certain Russian intellectual traditions, political and cultural practices and institutions. Putinism mixes a strand of Slavophile thought regarding Russian identity and nation building strategies with 19th and 20th century Russian theological thought and philosophy defining Russian exceptionalism as an anti-Western reaction and as a specific imperial/civilizational identity. To this mix, Putinism adds the czarist strategy of nation building coined by count Uvarov in the first half of the 19th century and the Soviet heroic mythology of heroic sacrifice (in respect to the Soviet contribution in the Second World War) and popular revolution in order to consolidate and legitimate a regime that, in my opinion, for the most part escapes Western taxonomies and is – unfortunately – reduced to authoritarian (sultanist), populist, and conservative (Fish 2017: 61, Țăranu–Pîrvulescu 2022). This reductionism is counterproductive, as it lacks the ability to provide an in-depth understanding of the state ideological discourse in Russia and, most importantly, of the effects it has, when turned into propaganda, over the Russian society at large. Even if the Putin regime will eventually collapse in the future, Putinism will hardly disappear and, as a consequence of the current international situation and the nature of this type of discourse, most probably it would be consolidated and radicalized. The exceptionalist-civilizational discourse on which Putinism is founded it's the brainchild of more than a century and a half of Russian political thought and represents the cornerstone for the institutional shape Russia's regime has taken for the last twenty years – the vertical of power as a mean of centralizing power without having institutional checks and balances, the concept of sovereign democracy which is clearly an attempt at designing political institutions by securitizing the fear represented by the Western existential (understood as a threat to what could be called Russian cultural security) threat in the Russian political imaginary and thus subverting any real attempts to construct a healthy democratic culture or a strong civil society, or the idea of a Russian World that transgresses borders and sovereignties in an imperial ambition to overlap political and civilizational borders, and ultimately becoming a legitimating tool for arbitrary military intervention but also adding anti-Westernism as an essential marker of Russian identity. Russia was, is and will most probably continue to be a multicultural empire. This intimately structures the shape taken by any attempt at constructing a national identity discourse by denying the use of a monoethnic identity that would necessarily inflame the tensions with the non-Slavs and the non-Christians, and thus feeding the centrifugal separatist tendencies and steering instability in the Russian state. Appealing to the ethnic core could threaten the very existence of the state. Thus, the main challenge for the Russian rulers and elites remains the construction of a coherent national identity that would address both the pre-modern and the post-communist realities of the multiethnic Russian empire. But in this particular context, the concept of an ethno-

cultural nation remains at best illusive and clearly unfit to explain Russian reality.

Surprisingly, in the Russian imperial case probably the most fitted approach to construct a national identity would be a civic one, that aims at creating unity in diversity around inclusive Republican-democratic institutions and practices empowering people and communities to keep their cultural identities and also to rally around in support of the national state. But the way in which the political regimes were historically constructed around autocratic power in Russia means that such a strategy is doomed to fail ab initio. This contradiction, between a centrifugal multi-ethnic Empire and an arbitrary, centralizing Autocracy ensures the long-term failure of the Russian nation building project in its imperial form.

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COMING TO TERMS WITH THE COLONIAL LEGACY? IMPERIAL MORES AND ENDURING CLASSISM IN THE UNITED KINGDOM

Palade Brindusa

Introduction

■ The death of Queen Elizabeth II on September 8, 2022 has rekindled across the world the debate about the legacy of the British Empire, given the historical ties between the British monarch and the imperial order. Although Elizabeth II's personal legacy has often been romanticized, she has also played an institutional role at the end of the British Empire.

In colonial countries that wanted to gain their independence, the final years of the Empire were a period of authoritarian rule, abuses and violence. This brutal legacy is by no means consistent with Elizabeth II's portrayal as a genteel champion of peaceful decolonization. Today, inquiries into past colonial injustices seem more necessary than ever, especially given the imperial amnesia that is so widespread in the UK. The oblivion coexists with a selective nostalgia for the imperial rule that has recently inflated, as well as with an upper-class paternalism preserved since imperial times.

The transition from the British Empire to the Commonwealth of Nations didn't involve significant structural reforms or new symbols of national identity. The responsibility for past colonial injustices including massacres, rapes, famines and so on was never seriously addressed by the British establishment. Harvard historian of the British Empire Maya Jasanoff wrote in a piece published by the *New York Times* on September 10, 2022, "Mourn the Queen, not her empire" that the late Queen "helped obscure a bloody history of decolonization whose proportions and legacies have yet to be adequately acknowledged"!

Great Britain was a crucial ally of the United States during WWII. After the defeat of the Axis powers by the Allies, no one questioned British political structures or imperial practices. The country was also seriously affected by the war and the victory over Nazi Germany was followed by years of economic austerity. Official historical narratives still emphasize heroism and post-war hardships, downplaying or hiding altogether the issues that eventually led to the independence of many colonies and the crumbling of the Empire.

The British Empire has been a clear example of government by racist double standards: rights, liberties and rule of law in Britain and abuses, corruption, and violence in remote colonies. At a closer look, however, even if formal liberties have been legally recognized in Britain for centuries, fair chances to succeed are even now less democratically spread across British society. Classism, or the discrimination against people with a lower socioeconomic status, is common on the British job market. Although the access to higher education at top universities (Oxford and Cambridge) from state schools has become more frequent over the last decades,² the old bias in favor of students from privileged backgrounds who are recognized through an upper-class accent lives on. In the United Kingdom, the gold standard remains the King's English that is only shared by a privileged minority.

Anti-immigration sentiments with xenophobic undertones are often unapologetically expressed by conservative politicians and journalists, currently under the guise of an 'anti-woke' crusade. A hardline conservative journalist like Douglas Murray may be said to epitomize this right-wing self-congratulatory, anti-immigration and 'anti-woke' movement, although his latest book, *The War on the West* has apparently failed to convince even British conservatives about the urgency to engage in an intricate culture war.³ Moreover, the intellectual frivolity of dedicating an entire book to argue against the 'danger' of wiping out the West through a war of ideas became even more obvious when Vladimir Putin invaded Ukraine on February 24, 2022, waging a real war against the Western values of democracy and human rights.

The history of the British Empire promoted by the conservative intelligentsia is full of triumphalism and half-truths. For example, great emphasis is placed on the Act of Parliament that decided to abolish slavery in 1807, decades before the US Civil War. This rhetoric understates the fact that all compensations for freeing slaves were paid to former slave owners, thus making them and their heirs very rich. Former slaves didn't receive any reparations for their brutal subjugation to other human beings.

Although courses in Postcolonial and African Studies are offered by many British universities, in the mainstream public discourse the history of colonial violence is covered by conservative narratives. There is evidently also a progressive minority, usually younger, that is keen to bring up the injustices of colonialism. Not surprisingly, British progressives often share to a larger degree the preference for an elected head of state. Many of them believe that modern societies may outgrow the need for monarchic symbols that incidentally preserve paternalistic social hierarchies.

Historical amnesia, combined with a selective imperial pride, has very likely influenced the vote to leave the European Union at the 2016 Referendum. It has already been argued that the Leave vote has conveyed an ideological clash between the older generations' nostalgia for old-fashioned imperialism and a more cooperative and solidarity-driven spirit within the European Union that used to hurt British narcissism⁴.

Of course, many other countries in the EU also had colonies in the past and their dark legacies are worth exploring as well. Nevertheless, despite some remaining imperial myths in other European cultures, the outdated colonial spirit has been questioned to a large extent in favor of more democratic values. The problem with British nationalism seems to be that it is still ridden with an overblown sense of belonging to an extinct Empire, the legacy of which is not critically examined. On the contrary, imperial rituals and traditions invented centuries before and expanded in order to represent colonial authority in British India and Africa, such as Jubilees, coronations, royal weddings and funerals (Hobsbawm, E.–Ranger, T. 1983: 120–262) are still meant to keep alive 'the splendor' of British monarchy.

Amidst the current UK cost of living crisis, the coronation of King Charles III on May 6, 2023 has been blamed by anti-monarhist pressure groups such as Republic for being too extravagant. The imperial habit of grand royal rituals, usually exploited by consumer-oriented firms, was reenacted in 2023 with enough pomp to look preposterous, especially during a period of economic hardship.

In the same vein, imperial symbols like the Order of the British Empire, a distinction that has the motto "For God and for the Empire" and is still bestowed by King Charles III on various individuals, sound rather obsolete and bombastic today. If we consider the imperial legacy of racism, theft, genocide and oppression it may even be morally insensitive to keep such a high distinction under this name.

The 'civilizing mission' – the ethos of the former Empire

In the nineteenth century and the first half of the twentieth century, the British rule over faraway nations that were seen as barbarian was justified through a 'civilizing mission'. While the notion was by no means new and has also justified the Spanish domination over and violence against American natives, this 'civilizing' ethos has been known to legitimize many unjust British laws, aka colonial dictates, against the natives in colonized Asian and African countries. In Africa, such laws took the land of natives and enabled white settlers who belonged to the British gentry to set farms and cultivate 'cash crops' (tea, coffee, and so on). Many colonial laws were set in order to make Africans dependent on wages for labor on their former land. That was followed by missionary attempts to convert the natives to Christianity, so as to limit cultural traditions such as polygamy or female circumcision.

Although one may argue that women's rights were implicitly promoted through noble missionary expansion overseas, it was done at the cost of depriving colonies, especially in Africa, of many resources and in order to condone many abuses and crimes perpetrated by white landlords. There was also a less than implicit ideology of white supremacy in the colonial worldview, since racial inferiority was often associated with the natives' 'savagery.'

The British Empire also exported a private-school kind of paternalism (Elkins 2005) which presumed that the innocent indigenous mind had to be improved by harsh methods. Initially, the settlers regarded most natives as child-like creatures who needed discipline. But later, when they refused to conform to their 'civilized' expectations, they treated them like wild beasts.

The righteousness displayed by the British colonialists in Asia and Africa also conveyed a sense of British superiority over other races (Elkins 2005: 83–84). Such 'moral superiority' was of course compatible, in their own minds, to the torture and suppression of rebels or people suspect of being rebels, as they effectively did during the Malaya Emergency (1948–1960) and the Kenya Emergency (1952–1960), in order to preserve the dwindling imperial order.

The repressive stage of the British domination in Kenya

The history of the colonial domination of Kenya by the British Empire shows how the white settlers managed to influence a colonial agenda that favored only their economic interests, while inflicting many grievances on the natives (Elkins 2005: 30–61). Furthermore, since young white settlers were later directly involved in the repression of the Kikuyu population, at the height of the Mau Mau uprising in the early 1950s, they were responsible for the torture, illegal detention and murder of many people, some of whom were innocent children. Even if most historians of the Kenyan war of independence against the British Empire don't go as far as to compare it to Nazi Germany, the atrocities committed against Kikuyu rebels, not to mention women, children and elderly people during the Mau Mau revolt are a very murderous chapter of the history of the Empire.

The colonial administration allowed for illegal centers of 'screening', that is harsh interrogation of people with supposed Mau Mau connections. The screening was usually coordinated by white officers, some of them very sadistic and experienced in torture. White officers were assisted by 'loyalists' (Elkins 2005: 62–90). The 'loyalists' also belonged to the Kikuyu tribe, being distinguished and heavily rewarded by the British administration for their active role in the brutal repression of the Mau Mau uprising. Later, after Kenya's independence in 1963 the British authorities handed the political power to the same loyalists. To this day, Kenya's political class is dominated by descendants of those who have benefited from British rule.

The cruelty of many black loyalists who tortured their fellow Kikuyu was often more egregious than the one displayed by the Europeans. This chapter of history allows for a more nuanced approach of colonialism than the one that only blames settlers with lighter skin color for all abuses and atrocities committed in remote areas of the Empire. As in the case of the African slave trade, which heavily involved black Africans who sold captured black people to Western slave owners, the historical facts may prove more complex than a simplistic binary ideology of white supremacy. There seems to be nothing inherently good or bad in the ethnicity or skin color of human individuals, although most historical trends seem to suggest that a darker skin tone is often associated with a more vulnerable socioeconomic status.

After the notorious Operation Anvil that purged Nairobi of all Mau Mau suspects in April and May 1954, the British administration built detention camps to which they deported the Kikuyu individuals they considered more radically involved with Mau Mau. They also coerced many detainees to labor although they managed to avoid formal charges of breaching the ILO Convention through an artifice borrowed from Malaya's colonial government: they claimed that most prisoners worked voluntarily, even if the reality was very different (Elkins 2005: 128–130).

The British colonial government in Kenya also violated the Geneva convention through the harsh way in which they treated Kikuyu POWs. The colonial administration classified prisoners according to white-grey-black categories and invented a 'Pipeline' system by which 'whites' were considered clean and sent back to Kikuyu reserves, 'greys' were sent to work camps and 'blacks' were considered irredeemable and sent to detention camps.

These classifications could change according to the level of cooperation of detainees with colonial authorities, since screening that squeezed confessions and intelligence was a constant process. During the interrogation the screening teams often whipped, burned, sodomized, castrated and forced to eat feces suspects whom they believed could be hard core Mau Mau adherents. One such suspect, a man who survived the torture and eventually confessed, recounted that after refusing to talk about his Mau Mau activities, one of the European settlers ordered the native soldiers (*ashkari*) to force scorpions into his back private parts until he began making up stories and giving names (Elkins 2005: 132–135).

The Pipeline system was predicated on the idea of increasing cooperation of the detainees with the colonial government. It wasn't intended as ethnic cleansing of the Kikuyu population. However, the brutal methods applied during screening and in detention camps caused the death of an unknown number of Kikuyu, which is believed by historians to be far higher than the official figure of 11000. According to the history reconstructed by Caroline Elkins, the British colonists effectively built 'a Gulag' in Kenya and dehumanized detainees, many of whom didn't survive the abuses.

In addition, terrible sanitary conditions in camps led to the Manyani typhoid outbreak in 1954. The British press, including some relatively conservative newspapers such as the *Times* and the *Daily Telegraph* brought to the public the news of the outbreak and pleaded for urgent remedies. However, in 1954 a new Colonial Secretary took office. His name was Alan Lennox-Boyd and he was a Tory with aristocratic pedigree, elite education, and a high-minded sense of duty. Unfortunately, he also possessed an authoritarian sense of moral righteousness and used to dismiss every African project of independent rule. After a choreographed visit to Kenya and an inspection of the Manyani camp in 1954, he misinformed the House of Commons about the actual sanitary conditions. His cover up couldn't prevent the eventual disaster, and countless detainees perished in that epidemic. Others died of nutritional diseases or waterborne infections such as dysentery, diarrhea and vitamin deficiencies (Elkins 2005: 145–148).

With some notable exceptions, such as Tom Askwith's Department of Community Development and Rehabilitation, most colonial structures during the Kenya Emergency were inhumane or utterly repressive, while at the same time the colonial administration and the Colonial Secretary in London tried to misinform the general public about the gravity of the situation overseas. Even Askwith's Department needed to make serious compromises due to its tiny budget that only amounted to 0.5% of Kenya's colonial budget. At one point, about half of the staff employed as rehabilitation officers were in fact screeners. One of them was Peter Muigai Kenyatta, Jomo Kenyatta's son, a loyalist converted from a former detainee who was notoriously cruel during interrogations, brutalizing detainees to force them into confessions from his new position of authority.

Elkins has counted over a hundred camps built in the Rift Valley and the Central Province as part of the Pipeline system (Elkins 2005: 154–191). This amounts to an African 'Gulag Archipelago' that, apart from specialized Postcolonial Studies, is very seldom mentioned in most conversations about the 20th Century atrocities.

The aristocratic backbone of colonial rule: the Kenyan case

Kenya was colonized not only by a strong foreign government that imposed unjust laws on the native population, dressed up in 'civilizing' rhetoric, but, even more importantly, through European settlers whose demographic mission was to eventually turn it into a white country. The social origin of settlers was usually aristocratic. Many were younger sons who didn't inherit land and titles and therefore were ready to settle elsewhere, taking advantage of the farming opportunities created by the colonial government on 'available land'. In Kenya, that 'available land' traditionally belonged to the Kikuyu, an agriculturist tribe settled in a fertile highland area that was known during the imperial times as the 'White Highlands'.

The Kikuyu consequently lost control over their land and many became squatters on European farms. They worked on those farms, thus getting permission to

cultivate a portion of the land for themselves and their families. The settlers were always lobbying the colonial government for more privileges at the expense of the natives. Indeed, most colonial laws in Kenya were dictates that favored the white upper-class settlers by impoverishing the African natives.

After the Mau Mau revolt began in 1952, most Kikuyu lost their squatter status and were sent to overcrowded reserves. Those who were suspected of Mau Mau activities were passed through screening and later through the 'Pipeline' system. Screening was similar to the third degree and not everyone was able to survive it.

As we have already seen, many British settlers supervised screenings in both formal and informal centers and ordered the use of brutal methods on the most hard core suspects. This supervision was again predicated on the British private-school system of educating ignorants, in this case the savage natives, through harsh discipline. Paternalistic behavior was of course more extreme against Mau Mau 'terrorists', since most settlers believed that brutal methods were fit to beings who ceased to belong to humankind. Although the British colonial settlers wanted to appear 'benevolent', their behavior to the anti-colonial Kikuyu in the Pipeline system was similar to what the Nazis did to Jews in concentration camps and the communists did to their ideological enemies in the Gulag.

The harsh repression of colonial uprisings was politically sustained by Tory governments. Perhaps the most famous Tory supporter of preventing the dissolution of the Empire at all costs was Winston Churchill, who in November 1942 had declared to the House of Commons that he had not become the King's First Minister to preside over the liquidation of the British Empire. Coincidentally or not, fast forward to the 2010s the Brexit propaganda was backed by prominent members of the same Tory party, beside the far-right populist UKIP led by Nigel Farage, that was also known as the 'Brexit' party.

British (post-)colonial classism

The debate over a classism that is inherent in socioeconomic structures is anything but recent in the UK. For decades there has been a public pressure on the top British universities (Oxford and Cambridge) to admit freshmen students from more socially diverse backgrounds. Figures obtained through social research show that they did.⁵ Likewise, the educational hierarchy that started from primary school and placed the alumni of private schools in the most favorable position has been balanced by higher academic standards in some state sponsored schools.

However, according to the *Diversity in Journalism* report from National Council for the Training of Journalism, in 2022 80% of British journalists came from professional or upper-class backgrounds. That figure has increased by 5% since 2020, when 75% of journalists came from privileged backgrounds.⁶ Such data reveal an industry that is highly unrepresentative and socially biased, while being very adept at forming the narrative. No wonder that the British media often perpetuates

stereotypes about the ‘bigoted working-class’ which voted for Brexit and dislikes people with different lifestyles, when actual research shows that the British working-class tends to be more tolerant than the upper- and middle-class.⁷

In the British Parliament, the representation gap is even wider. According to a 2022 study of the Institute for Public Policy Research cited by the *Guardian*, only 7% of the MPs can be considered working class, while the percentage of the working class in the UK population is around 34%. This figure looks better however than the staggering 1% working-class Tory MPs.⁸ The presence of multiracial conservative MPs, one of whom is the incumbent prime minister Rishi Sunak, doesn’t change that picture.

Classism does not mean only a socioeconomic bias in favor of the privileged classes. It also implies that everyone who comes from a lower background, either from a working-class or an immigrant family, and wishes to be successful in the UK is encouraged to boost their chances by learning how to mimic the upper-class behavior, attitude and pronunciation. Such is the ‘education’ project of London’s ‘finishing schools’ of etiquette and manners.

Although it may seem far-fetched to connect this enduring classism of British society with its colonial legacy, we must not forget that the symbolic foundation of the British Empire was the monarchy (aka “the British Crown”), supported by the nobility. The imperial mindset and the ‘civilizing mission’ came from an upper-class elite that believed in its own moral and intellectual superiority and cultivated a high-minded sense of duty that was usually expressed through patronizing behavior. The same trust in the intrinsic qualities of upper classes appears to influence even today the selection of ‘public voices’ in both British media and politics. The social background of the elite hasn’t changed much since imperial times.

What is more, the above figures show that the classist bias has even increased in the media over the last two years. Whether or not Brexit pride has been a factor, by encouraging British society to refocus on imperial righteousness and lost grandeur, is an open question. It seems clear however that a more socially diverse representation is not a genuine priority in Britain today.

Old mores perpetuated through conservative propaganda look safer than ‘progressive experiments’. Conservative propaganda has explicitly adopted a defensive discourse over the last years: the post-Brexit UK is portrayed as the last citadel against far-left ‘woke’ trends endorsed by both the US current Democratic administration and the EU. Once again, the UK has a mission to save civilization against extremist barbarians that topple statues and want to ‘change the world’ by destroying it.

Colonial nostalgia and failed transnational cooperation

The United Kingdom has closed up ‘the process of decolonization’ in the late 1960s. In 1975, it joined the European Union. To many, this seems a short period over which it is understandably difficult to reform old institutional practices.

The transition from imperial domination to 'partnership', first in the Commonwealth, then in the EU, wasn't however intended as a radical move from paternalistic diplomacy and politics to a more cooperative approach. On the contrary, the UK was known to exploit its membership to the EU to enhance its political control and promote its economic interests.

The old habit of leading other countries by colonial dictates has reemerged to a lesser extent through the ability of the UK to negotiate an opt-out of the Schengen acquis that was incorporated in the EU legal framework in 1999 by the Treaty of Amsterdam. The UK has also managed to preserve the British pound after the introduction of the Euro as a single currency.

Even long before Brexit, British exceptionalism was plainly asserted inside the EU. The UK usually demanded special treatment from the EU and resisted many Brussels policies. The psychological foundation of such exceptionalism could hardly be described in any other terms than a post-imperial syndrome.

That syndrome has become even more evident during the Brexit negotiations with Brussels. Then, the UK adopted a victim-like mentality for the populist camp, defensively fantasizing about a reversed colonial position. In this narrative, the EU bureaucrats were mercilessly trying to 'colonize' Britain. Such populist discourse may also reflect an inability to conceive transnational cooperation outside the imperial logic of domination and victimhood.⁹

Brexit propaganda and imperial pride

After the 2016 Brexit Referendum, the *Journal of Postcolonial Writing* dedicated a special 'Brexit' issue in which it interpreted the British choice to leave the EU as rooted in a narcissistic nationalism and persisting imperial mindset.

According to a postcolonial perspective, the UK suffered from the anxiety to unleash, as an EU member, its old colonial structures and cultural hierarchies¹⁰, most of which acknowledged the British superior values and skills over the awkwardness of 'savages'. The Brexit anti-immigration campaign of a populist like Nigel Farage was based on this very assumption of British superiority. The colonial history of Britain that is so little discussed and critically examined in the UK provides, according to the same analysis, a key to the Brexit campaign and the interregnum of Brexit negotiations.

It is also significant that the Brexit campaign has exerted a particular fascination on those who have witnessed the collapse of the Empire. The EU destabilized their sense of national pride and self-esteem by increasingly demanding policies (Beaumont 2018).

What was also challenged by the EU was the sense that Britain alone possessed the compass of 'Western civilization', especially through its enlightened upper classes. The idea of allowing 'less civilized' members of the EU, especially bureaucrats from new, Eastern European member-states, to dictate to Britain whatever laws and policies they should adopt, was clearly insufferable for nationalists.

Brexit propaganda has therefore relied on a nationalism rooted in nostalgia for imperial domination. That domination has been the undisputable achievement of the British upper classes. The latter have 'benevolently' spread civilization in backward countries around the globe. No wonder that conservatives are still vociferous supporters of Brexit, even after two years outside the EU in which the British market has adversely felt the effects and the average cost of food has increased with about 6% per year.¹¹

Concealments, abstractions and settlements

The history of British colonial repression during the Mau Mau uprising that I evoked here to illustrate the brutal reality of imperial domination was largely reconstituted through interviews with Kikuyu survivors by historian Caroline Elkins in her 2005 book, *Imperial Reckoning*, as a research into claims made by Mau Mau veterans during a lawsuit. Elkins mentions that British colonial authorities were eager to conceal records by locking them away in forgotten archives. According to her, other records of the Mau Mau suppression were 'cleansed' (Elkins 2005). Some relevant records have been later rediscovered however and used to support the claims. But the pattern was to conceal the unsavory side of detention in camps and to leave untouched the files concerning detainee reforms and the 'civilizing mission'.

After the collapse of colonial rule, the concern of the British administration has been how to save face in front of public opinion. They didn't want to appear guilty of oppressing and terrorizing native people, even if they couldn't entirely hide from the press and the Labour political opposition their deeds during the Kenya Emergency.

A psychological explanation of the British reluctance to apologize for past colonial oppression is offered by Philipp Wüschner (Wüschner 2017). He points out that a feeling of shame, like the one caused by the imperial crumbling, that doesn't transform into guilt can effectively lead to a 'narcissistic rage' that ignores the situation of the ones who have been wronged and only feels sorry for 'the loss of social recognition.' After losing an empire, the narcissistic self would feel even more hurt by recognizing its injurious past.

In more material terms, after suffering a humiliation in the post-WWII era of austerity, when taxes on inheritance diminished the wealth of British aristocracy, in recent decades the upper class has managed to thrive again. Today, it is still amassing capital, has privileged access to education and political influence and enjoys unparalleled social prestige. Since the ties between the upper class and the imperial history of Britain are so strong, that class is particularly interested in a self-aggrandizing version of the colonial past that praise the British contribution to expanding civilization, the formal abolition of slavery in 1807, the introduction of modern governance system and industrialization, and so on. The self-image of the old aristocracy depends upon the past splendor of the Empire and its positive impact upon less civilized nations.

When explicit apologies for colonialism and slavery are demanded, as it was the case during the 2022 Caribbean royal tour of Prince William and his wife Catherine, it seems easier for a member of the British royal family to revert to abstract condemnations ('slavery was abhorrent')¹² rather than inquire into the responsibility of their own predecessors for past colonial crimes. Likewise, during the then-Prince Charles's visit to Canada in 2022, indigenous leaders asked for a royal apology over the 'assimilation and genocide' of indigenous children. In reply, the royal only 'acknowledged' failures in the treatment of indigenous people.

Equally tone-deaf is a generic condemnation of racism by the British royal family that fails to address particular injustices, like the ones perpetrated against African natives during the reign of Queen Elizabeth II. Even if senior royals like Prince William and King Charles III occasionally address 'conscious' issues such as diversity and inclusion and denounce the horrors of slavery, a comprehensive royal apology for past colonial injustices is still hard to imagine. Even more unlikely is a policy of postcolonial reconciliation implemented by the British government. That would involve an expression of guilt that may be strongly rejected by the post-imperial narcissistic self of older generations. For the royal family, addressing colonial injustices would mean tarnishing Queen Elizabeth II's legacy, by admitting her complicated role at the end of the Empire.

Historian Maya Jasanoff reminds in her New York Times piece that shortly after Elizabeth II learned of her father's death and her ascension to the throne from the Treetops lodge in Kenya, British colonial authorities suppressed the Mau Mau revolt and established a vast system of detention camps in which tens of thousands were tortured, raped, castrated and killed.¹³

However, given the fact that the Colonial Secretary at the time, Alan Lennox-Boyd, was known to be a master of disinformation, even the Queen may have been kept in the dark in regard to the extent of the Mau Mau's repression carried out in her name. Or else, she could have been given the 'flowery officialese' during briefings, to use a phrase employed by a BBC correspondent writing about the Mau Mau Massacre on November 30, 2012.¹⁴ Historians doubt that, but as long as there are no available proofs of the monarch being cognizant of the brutality of her colonial government against the Kikuyu, we can at best surmise that she didn't know everything. Whether or not she wanted to know more, given the sensitive issue of detention camps and massacres so soon after WWII, is another question left unanswered.

Eventually, in 2013, the British government paid around £20m in the lawsuit brought against it to the High Court by four Mau Mau veterans. As I already mentioned, the claims were also based on the extensive research undertaken by Caroline Elkins. Another crucial research into the claims belonged to the historian of East Africa David Anderson, author of the book *Histories of the Hanged. The Dirty War in Kenya and the End of Empire*. In addition, some records of the interrogations that were previously concealed have resurfaced, thus providing a stronger support to the claims.

Following the survivors' victory in the court case, William Hague, the then Foreign Secretary, gave a statement to the House of Commons expressing the British government's regrets 'that these abuses took place.' A final result of the settlement agreement was the unveiling in 2015 of a memorial in Nairobi commemorating the victims of colonialism.¹⁵

Concluding remarks

The passing of Queen Elizabeth II has reignited questions about British imperial history and her own responsibility for the colonial legacy of violence. However, this international debate doesn't seem to inspire the British establishment to come to terms with this controversial legacy.

The Brexit agenda has in fact relied upon imperial nostalgia and outdated nationalism. Brexit triumphalism is being voiced today by a jingoistic media despite growing living costs and other adverse effects of departing from the EU.

Self-aggrandizing propaganda seems still very convenient to the British upper classes. After all, imperial history wouldn't have been possible without the British noble ruling class. Most of their descendants are therefore inclined to overstate the positive impact of the Empire and forget about the rest.

Classism is still an issue in British society. Not only did imperial structures rely on social hierarchies, but most British institutions rewarded the merits and obeyed the authority of individuals coming from privileged backgrounds. Although that kind of hierarchy is more flexible today, it still exists.

The specter of the British Empire keeps haunting those who have witnessed its humiliating demise. The Brexit vote was proof that imperial nostalgia may as yet cater for political delusions. Similar delusions have fueled the faith in British exceptionalism during the UK membership to the EU. The re-enactment of royal rituals such as the pompous coronation of King Charles III on May 6, 2023 is proof of imperial traditions still being used to reinforce British nationalism, as well as the belief in UK's structure of government, whose predictability is "unique".

Yet, if British conservative politicians from Winston Churchill to Boris Johnson have bolstered nationalist sentiments through imperial rhetoric, not all conservatives worldwide were equally impressed with the achievements of the British Empire. For the right-wing individualist philosopher Ayn Rand, for example, the only two invaluable contributions of the British Empire to civilization have been the afternoon tea ritual and the detective novel.

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Photo/Iván Halász

THREATS OF WARTIME RESTRICTIONS TO POST-WAR DEMOCRACY IN UKRAINE

Mykola Polovyi

Introduction

■ We live in the world of threats – to life, to freedoms, to democracy etc. All those threats are anthropogenic, naturally. In the case of natural disasters, the influence of the unconscious and ill-considered actions of humanity itself is generally recognized. In the case of many political processes, external forces, although anthropogenic in essence, often appear as a source of threats. In particular, contemporary authoritarian regimes are an undeniable threat, trying to expand their spheres of influence and revise the foundations of the modern world order. The main troublemakers in this sense are undoubtedly the authoritarian Russian Federation and China. At the same time, more and more studies have appeared recently devoted to the analysis of the internal mechanisms of the evolution of once-democratic regimes into authoritarian ones (Rak–Bäcker 2022). A lot of publications analyze in detail the ways of transforming democracies into different formats of militant ones (Baker–Rak 2022; Rak 2020; Kirshner 2014, Ellian–Rijpkema 2018).

Modern Ukraine provides an example of a state that is gradually taking the path of abandoning democracy and civil society activities, but under the influence of factors that are extremely unusual for the modern world – under the influence of the armed aggression of the Russian Federation. In wartime conditions, the already fragile democracy of Ukraine is experiencing additional authoritarian pressure of an internal nature.

So, the aim of the paper is to assess the amount and essence of measures, connected with wartime restrictions of political process and communications, adopted in Ukraine during the Russian–Ukrainian war from February 2014 to January 2023, and to assess the grade of their threat for post-war democracy in Ukraine.

Sources and methods

I analyzed three main channels of political information in Ukraine – “Ukrainian Pravda” (“Ukrainian Truth”), “Dzerkalo Tyzhnja” (“Mirror of week”), “UNIAN” (“Ukrainian Independent Information Agency of News”) – and searched for references to political transactions.

Research based on the well-known idea, that in the information era, political transactions receive an existence only in the form of some public communicative act, which is recorded in media messages.

Theoretical framework of the research is bidirectional. The first direction connected with the theoretical grounds of neo-militant democracies analysis, proposed by R. Backer and J. Rak. The second ground of the research is my theoretical model of political density. This model was developed with the aim to determine and assess the relationship between the degree of density of political process and the stability of the regime. But it turned out that the model establishes a certain correlation between the density of politics and the degree of democracy or authoritarianism of the political regime also. So, public communicative acts, that constitute the content of the political process, are taken into account based on the main provisions of this model, which are as follows:

The central concept of the model is the notion of political volume (a three-dimensional social space, bounded by the borders of the state, in which there is some density of social relations. The closest analog is the density of gas in some volume.

The density of social relations depends on the number of interactions and the number of subjects of those interactions:

Then

$$DSR = I * St \quad (1)$$

Where DSR is the density of social relations;

I – is the number of all interactions in a society;

St – the number of individual subjects of social relations.

It is clear, that the density of social relations is directly correspond to civil society activities.

Based on this assumption, the concept of “density of politics (political activity, political process)”, is defined through the concept of political interactions.

Political interactions include any interaction in which at least one party is a translator of a political text.

Then a “political text with the attributes of subjectivity” is directed toward politics, and its translator proceeds from an awareness, possibly erroneous, of his subjectivity. That is, he interprets himself as a subject, i.e. as someone who has his own political goal and the right to achieve it.

I draw on Thomas’s theorem here, according to which “if a situation is recognized as real, it is real in its consequences.”

Applied to political subjectivity, this means that if, for example, I believe that I am acting in the sphere of politics, then I recognize myself as a subject and my actions have the character of the subject’s actions, which bears external signs of subjectivity.

Both physical actions and simple text are treated as a text.

I am referring specifically to the translator of a political text (in the broad sense I mentioned above), to emphasize that the author of the text may not be known. I assume the possibility of existence both a collective and an individual translators. It is also obvious that each act of translating a political text has some number of recipients.

An important provision of the model is condition, that the number of interactions is ultimately determined by the availability of their (as a matter of fact, technical) possibility. The possibility of interactions is determined by the number of available channels of communication, both organizational and technical.

Thus, we can propose the concepts of:

Proportion of political interactions:

$$PPI = I_p / I \quad (2)$$

where

I_p is the number of political interactions;

I is the number of all interactions in society;

Proportion of political actors (translators):

$$PPA = S_{pt} / N \quad (3)$$

where

S_{pt} is the number of subjects of political transactions (political actors);

N is the entire population of the country.

Then the density of politics can be defined as follows:

$$DP = PPI * PPA = (I_p / I) * (S_{pt} / N) \quad (4)$$

Simplified with the aim of quantification, I define density of politics as the relative number of political transactions:

$$DPs = I_p * S_{pt} \quad (5)$$

where

I_p is the number of acts of political interactions;

S_{pt} is the number of political subjects (subjects of political transactions).

Extensive examples in the political history of the 19th and 20th centuries convince that *ceteris paribus*, as we approach modernity, the number of political actors (in the broad sense of translators of political text I mentioned above) increases and at the same time the relative integrity of these actors decreases. In other words, there is a tremendous increase in the number of transactions in contemporary politics, which greatly simplifies any complexity of potentially possible discourse. Internet is precisely an appropriate way of multiplying the number of transactions, or imitating them, which, in the light of Baudrillard's ideas, has the same ontology.

Based on abovementioned concepts I suggest that the dynamics of policy density can serve as an indicator of the regime's movement toward democracy or authoritarianism.

Based on the model, I suggest that evidence of movement toward democracy would be an increase in density of politics, and evidence of movement toward authoritarianism would be a "thinning of the political atmosphere" – that is, a decrease in density of politics.

An simple self-checking confirmation of such suggestion would be the current situation in Russia: the increasing tightening of the regime is accompanied by an effective reduction in the number of actors (the defeat of all NGO's, non-systemic and now also systemic (the KPRF) "opposition", although this name looks strange in relation to Russia in the last 5–6 years, and, simultaneously, also a huge reduction in the number of political interactions.

The main parameters, taken into account, were various restrictions of political activity and civil society energies, usually associated with the neo-militant democracies' measures.

There were:

- 1) freedom of speech, the press,
- 2) freedom of religion,
- 3) freedom of association and public gatherings,
- 4) possibilities of protests in social media,
- 5) possibilities and confines for anti-Ukrainian propaganda.

The period of study was divided into three stages – 1) from the beginning of the war till Covid–19; 2) the period of "semi-peaceful" Covid–19 restrictions (2020 – the beginning of 2022); 3) from 24 February 2022 till January 2023.

Results of the analysis

The study shows that two first periods from the beginning of the war till the 24 February 2022 have a lot of common features. Not the beginning of the war in 2014, nor Covid-19 didn't affect significantly rights for speech, press and religion.

For instance, Russian newspapers/books remain as available as they were before the beginning of the war. Any restrictions on their distribution were a headache of enthusiasts. Support for Ukrainian book publishing was also a matter for enthusiasts, not state authorities.

Even after the Tomos adoption in 2018, the Ukrainian Orthodox Church of Moscow Patriarchy (pro-Russian) feels completely confident. Moreover, throughout the entire time before the start of the open invasion, there were additional difficulties in registering the communities of the new, Ukrainian Orthodox Church of Ukraine.

Even after the start of an open invasion, no one touched the Russian branch of the Orthodox Church in Ukraine. Only by the end of the summer of 2022, there were calls from public organizations and local authorities (in western Ukraine) to limit the influence of the pro-Russian Church, or even close its parishes. In this case, we are dealing with that rare situation when civil society initiates the introduction of measures of militant democracy.

Freedom of speech was not limited also. This can be seen from the fact that the possibilities of pro-Russian propaganda promoting in social networks and in the press were not limited in any way. Of course, it became impossible to publish direct calls for the elimination of Ukrainian state from the end of 2014. But poorly veiled anti-Ukrainian exhortations was still possible. Openly pro-Russian media also existed until April-May 2022. Pro-Russian propaganda also circulated freely on social media until the February 24 invasion.

At the same time, the fact of waging war was periodically used by the authorities in order to fight against political opponents. In particular, both under the presidency of Poroshenko and under the presidency of Zelenskyy, attempts were made to close down TV channels owned by the opposition. Since in Ukraine those channels usually owned by oligarchs, at the end of 2021, as part of the implementation of the law on the fight against oligarchs, an attempt was made to deprive Ukrainian oligarchs of the media that they owned. In fact, this was the sole purpose of passing this law. It is generally accepted that the result should have been the transfer of media under the control of the office of the President of Ukraine. As a result, large media facilities owned, for example, by Poroshenko, were forced to change their formal ownership structure. However, the old owners retained indirect control over them.

Before the start of the full-scale Russian invasion, among all the factors taken into consideration, the restriction of freedom of assembly during Covid was the most severe. Let's remind, that according to my model of political density, political density is captured as the product of interactions and actors. A decrease in any of the multipliers leads to a decrease in policy density, and so would be a step towards authoritarianism.

According to the analysis of political transactions in Ukraine we can see three trends of political dynamics:

1) since the Revolution of Dignity in 2014 and on one's inspiration until the beginning of the Covid restrictions, there has been an upward trend in the number of political transactions (both verbal and physical). So we can conclude strengthening of the democracy in Ukraine and weakening of authoritarian means in this period. 2) after the beginning of the Covid restrictions we see a steady downward trend in the share of political interactions. Moreover, due to the specifics of the period of the epidemic, the agenda is deeply "simplified" – up to 10% of all political interactions during this period are related to "medical and health care" activities. Naturally, those activities have an external form of politics but are ad hoc reactions of the state to epidemy only.

Thus, data analysis based on the proposed model shows a slow implementation of militant democracy measures in Ukraine after the start of the period of Covid restrictions. It must be emphasized that Ukrainian data shows that neither beginning of the war in 2014 nor the Covid–19 lockdowns couldn't bring the country to significant militant democracy measures. All the time state authorities slowly had gone further to authoritarian-minded consolidation in front of the perceived danger of the political crisis. At the same time due to "off-line restrictions" during the Covid–19 period we can see the trend of increase of the quantity of controversial decisions of authorities despite people's protests.

3) The third trend, the trend of fast implementation of militant democracy measures began with the moment of Russia's open invasion to Ukraine.

From 24 February 2022 Ukraine implemented a martial law which entails a lot of restrictions for political activity. Freedom of assembly and freedom of speech were restricted. At the same time, Ukrainian authorities made additional confines for pro-Russian-minded forces. In particular, the activities of several pro-Russian parties such as "Opposition Platform – 'For Life'" and "Sharyi Party" were prohibited.

It looks understandable and welcomed by Ukrainian society, but it should lead to many discretionary consequences for the future development of democracy in Ukraine.

The most notable measure of militant democracy of a non-directional nature (i.e. not directed at any specific political actors) during the invasion was the beginning of a single television broadcast in March 2022 – a round-the-clock marathon "United News #UArazom". At the same time, the implementation of this decision during around a year of hostilities had different facets: for example, at the beginning, almost all TV channels were simply closed, including openly opposition ones, for example, the "Prjamoi" ("Direct") channel which is affiliated with the former president Poroshenko. Then a part of even dubious but loyal to the authorities TV channels were added to the process of organizing a single broadcasting, but openly opposition ones were not included in this single broadcasting network.

Plans also emerged during the summer 2022 to introduce a ban on political activity for former members of (already banned) pro-Russian parties. Moreover, there were persistent rumors that in the wake of the success of the summer counter-offensive and the expected imminent victory of Ukraine in the war, the Ukrainian authorities were preparing to hold pre-term parliamentary elections. Given the ban on participation in politics of some oppositionists and on the wave of euphoria from the victory, the presidential party should have gained a constitutional majority (more than 300 seats) in the Parliament, and this would undoubtedly create a serious threat to democracy in Ukraine. So far, these plans have not been implemented, but there is no doubt about the feasibility of their implementation within a few months after Ukraine's victory in the war. There is no doubt also that the people of Ukraine will support this process. For the January 2023 there is no any decisions of termination of powers of Verkhovna Rada deputies, elected from the banned party "Opposition Platform – 'For Life'". Everybody agree, that there is social approval of such deals, but all invented ways of the termination conflict with the Constitution of Ukraine. It can be assumed, that such termination of powers of deputies from banned parties will be the next visible step of Ukraine to the neo-militant democracy.

There is one more issue raised recently: in the later autumn 2022 and in winter Russian forces had become targeted especially objects of civil infrastructure, such as power plants, power lines etc. In this case, we are dealing with classic terrorist tactics. As you know, this tactic involves intimidating the holder of power – the people – so that they, being frightened, in turn, put pressure on the government to comply with the terrorist's demands. This tactic is extremely successful in the case of genuine democracies, where, under the pressure of frightened people, the governments, that are true to their employees, are ready to make practically any concessions to terrorists.

However, in the case of modern Ukraine, the successful introduction of elements of militant democracy – and above all the undemocratic centralization of the media space – leads to the opposite result. Instead of demanding a speedy truce with Russia from the government (which Putin obviously wants), the people were calmly and even militantly accepting the restrictions associated with interruptions in the supply of electricity, water, and heat.

Conclusions

So, in the conditions of a military conflict, the negative manifestations of militant democracy, primarily in the area of limiting media freedoms and forming a single media agenda, restrictions of oppositional political activity, turn out to be very useful for ensuring people's mobilization for struggle (mobilization in the broad sense of the word) and for successful armed resistance to a stronger enemy.

In modern Ukraine, anti-Russian and pro-war propaganda, reinforced by the monopolization of the media, actually deprives the “terrorists” from the Russian political leadership of the opportunity to successfully pressure the Ukrainian government through the people.

So, we can argue that a by-product of the implementation of the measures of militant democracy is the guarantee of victory in the war.

At the same time, an extraordinary strengthening of militant democracy in the first months after the end of the war (as the trend prolongation) looks inevitable. There can be no doubt that without additional efforts to eliminate the influence of militant democracy measures, after the end of the war, Ukraine will inevitably fall into the trap of neo-militant democracy. Moreover, criticism of this regime from outside and inside the country will be extremely difficult because it will be a regime that has led the country to victory over a more powerful enemy. All these factors will limit freedom of expression and development of civil society in Ukraine after the war.

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focused on important stages in the evolution of Judeo-Christian apocalypticism, but also the analysis of its function and how it is used.

Before I speak of the end narratives, apocalypticism, Apocalypse, and the contexts in which they arose, I want to define briefly the idea of a political imaginary and explain how it is to be included in this work. This concept is defined by Charles Taylor in the book *Modern Social Imaginaries*. He argues that the political imaginary represents how human societies imagine social existence, how their members relate to each other, and how events of any kind are interpreted (Taylor 2004: 23). This approach to the concept can also be extended by adding to the observations made by two authors (Browne–Diehl 2019: 394), in a way that allows me to study apocalyptic narratives. More specifically, the two talk about a “collective structure” that allows the organization of imagination and symbolism in the political space and which organizes the processes of political life.

In the Western cultural space, the idea of the end of the world is in most cases associated with the Apocalypse of John, one of the most influential and controversial texts in the Christian canon, and with the narratives and myths it has generated or influenced over time. However, in order to respect the historical approach and to have an overview of the apocalypse, I want to start from the period of antiquity. I must point out that the term “apocalyptic” is used in this paper in the form proposed by Greg Carey, that of the historical and social context that leads to the formation and evolution of apocalyptic eschatologies, but also of the narratives they produce. For these reasons, I believe that my discussion must start from Zoroastrianism and how the worldview proposed by this religion was a fundamental transformation from the myths that had previously appeared. More specifically, Zoroastrianism proposed an idea of an imperfect, even chaotic world that would eventually be replaced by a new, perfect world (Cohn 1999: 31). He preached his apocalyptic ideas in a pastoral society, relatively stable, but facing profound social transformations. Norman Cohn argues in *Cosmos, Chaos & the World to come: The Ancient roots of apocalyptic faith* that the “world” in which Zoroaster lived and preached was in a state of relative tranquility for centuries, in which human groups were divided into two large groups: the tribes of shepherds, who lived from animal husbandry, and the “warrior” tribes, the prophet identifying with the first. The technological military developments that led to profound social transformations: The emergence of the warrior class and their dominance over the groups they were part of, starting an era of chaos, imbalances (Cohn 2001: 94–95).

Based on the political and social realities of the world in which he lived and his message, Zoroaster can be called “the first millennial prophet,” Cohn points out. Thus, he preached a violent end to the physical world, followed by a state of balance and harmony between human beings, but also between humanity and divinity (Cohn 2001: 95–100).

“What lies ahead, at the end of time, is a state from which every imperfection will have been eliminated; a world where everyone will live for ever in a peace that nothing could disturb; an eternity when history will have ceased and nothing

more can happen; a changeless realm, over which the supreme god will reign with an authority which will be unchallenged for evermore.”, according to Cohn (Cohn 2001: 99).

The evolution of Zoroastrianism as the state religion of the Persian Empire has led to a profound transformation of the practitioners apocalyptic millennial visions, so that the doctrines of the end of the world and its change do not conflict with the imperial idea and the political imaginary built around it (Marlow–Pollmann–Noorden 2021) (Cohn 1999: 43–44).

Despite the similarities between the modern apocalyptic imaginary and the one proposed by Zoroastrianism, most historical approaches to the former take as their starting point the apocalyptic visions produced by the ancient Jews and the context in which such narratives were born. As Alison McQueen explains, when we talk about the apocalypticism in ancient Palestine, its spiritual and religious side cannot be separated from the political one, from the way those communities imagined their limits, their relationship with the rest of the world and especially the situation they were in. This author calls this situation “political theodicy” (McQueen 2018: 26) and points out that those who first produced the end-of-the-world narratives were trying to create a form of rhetorical balance between official religious dogmas, namely the covenant with divinity, and the objective political reality of the world in which they lived. In accordance with this approach, some prophets such as Isaiah or Amos built a worldview of a spiritual nature and with profound political implications in which the political problems of the Jews ultimately represented a punishment from God for their sins (McQueen 2018: 26).

The connection between apocalyptic myths and the political imagination can also be seen in the way in which the former were used by the political and religious elites of ancient Palestine to explain or even support the relationship between their communities and the surrounding empires that exercised their hegemony over their. More specifically, George Ricker Berry argues that in addition to the explanatory role, apocalypticism was more or less surprising to offer consolation to those who suffered (Berry 1943: 9). Thus, texts of this kind spoke of a better world that would replace the present one. As far references to immediate political realities go they tend to be sporadic and hidden in metaphors. However, in general, they indicated that the end of the world, here with the sense of its profound transformation, would be the result of direct intervention by the divinity.

In parallel with the idea of offering conformt to those who suffered, apocalyptic texts were used to create and justify the need for resistance in the political imagination of Jewish communities. In general, this leads to two planes in which this resistance to external influences and violence can take place: Social transformation, coupled with liberation from political domination; plus a cultural approach that involves preserving one’s own culture and narratives about the past (Harlow 1985: 6–7).

It should be stressed that there is no absolute consensus on how apocalyptic narratives were integrated into the political imagination of ancient Jewish communities.

More specifically, some researchers, including William Lamont, argue that they were used to reinforce the status quo at a given time and even the hegemony of foreign powers over the groups that produced such narratives. The relationship of Jewish apocalypticism with the political imagination can also be understood by reference to its authors. Commonly, common knowledge and many researchers argue that such narratives originate at the fringes of societies, among those with limited social and political influence. However, John Reeves and William Adler argue that it originated in some cases within the political and religious elites, benefiting from their influence on public perceptions (Adler 1996: 6) (Reeves 2005: 3).

As I explained above, I start from the idea that the political imagination is one of those factors that allows a community to represent its position in the “world” and its relations with people and groups outside it. Some authors propose interpretations of how apocalyptic narratives created in ancient Palestine were used that capture this function. Specifically, apocalyptic has provided patterns for understanding social and political reality, but also a framework for acting or, on the contrary, not doing so in certain contexts (Portier–Young 2014: 156).

Historically, Christian apocalypticism can be considered an extension, at least in the first decades and centuries, of the Jewish one. However, the different theologies, but especially the social and political contexts in which the two religious traditions developed, have made the end-of-the-world narratives constructed from different concerns. Discussions about the end of the world in Christianity mistakenly start with the Apocalypse of John, the last book in the Bible. However, as some biblical scholars point out, such debates should start from Jesus Christ and the message attributed to him. Among them is Albert Schweitzer, an author who proposes a historical analysis of the doctrine of this prophet, rather than theological or spiritual. Thus, he argues that Christ may be considered an apocalyptic prophet of the first century of our era who would not have expected the material world to continue its existence until the 21st century (Schweitzer 1978).

With the spread of Christianity and the rise of the first Christian communities around the Mediterranean Sea, the first translations of the Gospels and other books of the New Testament began to circulate, including the Apocalypse of John, accepted into the Christian canon around the year 200 of our era (Talbert 1994: 1). These groups read this text as a warning about the collapse of the Roman Empire, a natural approach given the apocalyptic substratum of the doctrines they adhered to, and their initial position as fringe of Roman society. Over time, with the political imagination, interpretations of apocalyptic narratives have also transformed, including the events described in the original text, along with interpretations linking the end of the world to the possibility of nuclear war or the effects of global warming (McQueen 2018: 22–23)

The role that Christian apocalyptic play in the political imagination can also be understood by interpreting biblical narratives as political myths or at least as starting points for them. More specifically, as Henry Tudor argued, the early Christian communities did not see the end of the world as a distant future event.

On the contrary, for them, it was a phenomenon that was taking place in their own time, although this end did not come, eschatological scenarios were “rewritten”, being brought back to the public attention by various natural disasters (Tudor 1972: 94–95). With the stabilization of Christianity’s position in the Roman Empire, a process of limiting the eschatological approach took place, in which the Church tried to support the reading of the Book of Revelation only in a spiritual key (Tudor 1972: 98). I believe that this process has ultimately led to the marginalization of concerns about the end of the world and how it could be related to the everyday problems/crises in the Western political imagination. However, it can also be argued that even allegorical interpretations of a spiritual nature can have political implications, especially in those cases where apocalyptic narratives that refer to divinity eventually reach the point of view. question the authority of political institutions that oppose social change (Pocock 2003: 46).

With social, cultural, scientific and technological developments, apocalyptic narratives have diversified, resulting in two broad categories: sacred Apocalypses and secular Apocalypses. If in the case of sacred apocalypses, events occur as a result of divine intervention, in the case of secular ones, the underlying crises are controlled/caused by humans or by nature, not to mention the intervention of divinity (Jones 2022: 45).

One of the premises from which I start in this paper and on which I build my doctoral thesis is that apocalyptic narratives are and can be analyzed as political myths, or at least these or only elements of them can be integrated into political myths. Thus, assuming this premise allows me to argue that apocalypticism has always been included in the political imagination and to briefly analyze the implications of this conclusion.

Richard Kyle argues that apocalyptic narratives of a secular nature have their roots in a “naturalistic” worldview, which often referred to what we might call “environmental factors” such as climate or problems caused by the use of nuclear weapons. Apocalypticism has been brought back to the public’s attention by world wars, the Cold War and the threat of nuclear annihilation. Fears about nuclear weapons, environmental catastrophes, or public health issues have captured the Western political imagination and beyond (Kyle 2012). Based on this argument, Simon Dein argues that the Covid–19 pandemic was perceived in apocalyptic terms, its impact on the political imagination being that of profound changes in societies (Dein 2020).

In conclusion, I believe that biblical apocalyptic myths have been an important part of the Western political imagination, by referring to the social and political contexts in which they were born, but also by the way in which over the centuries and communities have managed to adapt, to produce new variants. They were used to build the worldview of various social groups and to establish the relationships within them, but also that they had with otherness.

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MIGRATION BETWEEN LATIN AMERICA AND THE UNITED STATES OF AMERICA IN 2015–2018

DIFFERENCES OF IMMIGRATION POLICIES BETWEEN THE OBAMA AND TRUMP ADMINISTRATIONS

Stefanita Puiu

Introduction

■ The history of immigration from Latin America to the United States is complex and has been impacted by a number of factors, including economic, social, and political factors from all of the countries involved. Latin America is the largest source of immigrants to the United States, accounting for over half of the total foreign-born population in 2019. (Lopez–Radford 2017). The majority of these immigrants come from Mexico, with 11.2 million Mexican-born immigrants living in the country in 2020 (Esterline–Batalova 2022). The list of major contributing countries in the migratory wave consist of El Salvador, Guatemala, Honduras, and other Central American countries. The number of Latin American immigrants in the US has increased significantly in recent decades. It is relevant to mention that there were 19.5 million Latin American immigrants in the US in 2020, accounting for 47% of the total immigrant population (Pew Research Center 2022).

The reasons why Latin American immigrants come to the US vary, but some of the most common factors include economic opportunity, family reunification, and political instability or violence in their home countries (Esterline–Batalova 2022). For example, in recent years, many immigrants from Central America have fled violence and gang activity in their countries (Babich–Batalova 2021). The issue of illegal immigration from Latin America has been a contentious political issue in the US for many years. In recent years, the Trump administration implemented a series of policies aimed at cracking down on illegal immigration, including building a wall

along the US-Mexico border and implementing strict immigration enforcement policies (Nazario 2020).

The history of Latin American immigration to the United States is long and complex, with waves of immigrants coming at different times for different reasons. For example, in the early 20th century, many Mexican immigrants came to the United States as migrant workers, especially in agriculture. In the 1960s and 1970s, political instability and violence in countries like El Salvador and Guatemala led to an increase in immigration to the United States (Tienda–Sanchez 2013). Despite political controversy around immigration from Latin America, many Latin American immigrants make significant contributions to the US economy and society. For example, Latin American immigrants are more likely than US-born workers to be employed in industries such as construction, agriculture, and hospitality (Esterline–Batalova 2022).

Overall, immigration from Latin America to the US is a complex and multifaceted issue that continues to shape the country’s demographics, culture, and politics. Today, immigration from Latin America to the United States is the subject of much political debate, with some advocating for stricter immigration policies and others arguing for more lenient policies that provide a path to citizenship for undocumented immigrants.

Legal and illegal immigration from Latin America

Latin America has been a major source of immigrants to the United States for many years. A relevant input is that there were approximately 11.3 million unauthorized immigrants in the United States in 2016, and 78% of them were from Mexico and Latin America (Passel–Cohn 2019). This number represents a decline from the peak of 12.2 million unauthorized immigrants in 2007 (Krogstad–Gonzalez-Barrera 2019). Legal immigration from Latin America to the United States has been declining in recent years. According to the Department of Homeland Security, there were 467,370 legal immigrants from Latin America in 2015, which decreased to 427,318 in 2016, and further declined to 414,238 in 2017 (United States Department of Homeland Security 2019). According to data from the United States Department of Homeland Security, there were approximately 2.8 million legal immigrants from Latin America between 2015 and 2018. Of these, the majority were from Mexico, with over 1.1 million Mexican immigrants coming to the United States during this time period (United States Department of Homeland Security 2021). This trend is mainly due to the changes in the U.S. immigration policies under the Trump administration. In 2017, the Trump administration announced the end of the Deferred Action for Childhood Arrivals (DACA) program, which protected young undocumented immigrants from deportation. The administration also announced a travel ban on citizens from seven Muslim-majority countries, which created uncertainty and fear among immigrants from all over the world. Furthermore, the

administration has implemented stricter rules and procedures for obtaining visas and green cards, making it harder for immigrants to enter and remain in the United States (Krogstad–Gonzalez-Barrera 2019).

Illegal immigration from Latin America to the United States has also been declining in recent years. It can be observed that the number of unauthorized immigrants from Latin America decreased from 7.7 million in 2007 to 6.2 million in 2016 (Passel–Cohn 2019). The majority of unauthorized immigrants from Latin America are from Mexico, but the number has been declining in recent years. The number of unauthorized immigrants from Mexico decreased from 6.9 million in 2007 to 5.4 million in 2016 (Krogstad–Gonzalez-Barrera 2019). The decline in unauthorized immigration can be attributed to a number of factors, including the improving economic conditions in Latin America, the increased border security and enforcement measures, and the changing U.S. immigration policies.

Immigration policy of the Obama administration

The Obama administration's immigration policy for Latin America was focused on improving border security, increasing legal immigration opportunities, and providing a pathway to citizenship for undocumented immigrants. The administration also sought to address the root causes of migration by promoting economic development and democratic governance in the region (The White House 2014). The Obama administration invested heavily in border security, with a focus on preventing illegal immigration and drug trafficking. The administration increased funding for border security technology and personnel, and implemented a program to detect and apprehend undocumented immigrants who had committed crimes (The White House 2014).

The administration also sought to increase legal immigration opportunities for Latin Americans. In 2014, the administration launched the Central American Minors (CAM) program, which allowed certain children from El Salvador, Guatemala, and Honduras to apply for refugee status or parole in the United States (United States Citizenship and Immigration Services 2015). The administration also expanded the Deferred Action for Childhood Arrivals (DACA) program, which provides temporary protection from deportation and work authorization for undocumented immigrants who arrived in the United States as children (United States Citizenship and Immigration Services 2016).

The Obama administration supported a pathway to citizenship for undocumented immigrants. In 2013, the administration worked with a bipartisan group of senators to develop a comprehensive immigration reform bill that would have provided a pathway to citizenship for undocumented immigrants, as well as increased border security and reformed the legal immigration system. However, the bill ultimately failed to pass Congress (Los Angeles Times 2013).

The Obama administration recognized that addressing the root causes of migration was essential to reducing the number of undocumented immigrants entering the United States. The administration worked to promote economic development and democratic governance in the region through programs like the Alliance for Prosperity, which provided economic assistance to El Salvador, Guatemala, and Honduras (Reuters Team 2016).

Immigration policy of the Trump administration

The immigration policy of the Trump administration for Latin America was characterized by a strong focus on reducing illegal immigration and increasing border security. The administration also implemented policies to restrict legal immigration and made efforts to limit aid to countries that did not cooperate with U.S. immigration enforcement efforts.

The Trump administration prioritized border security as a key component of its immigration policy for Latin America. The administration increased funding for border security technology and personnel, and implemented a “zero tolerance” policy that led to the separation of families at the border (CNN 2018). The administration also worked to build a border wall along the U.S.-Mexico border (The White House 2017).

The Trump administration implemented policies to restrict legal immigration from Latin America. In 2017, the administration ended the Deferred Action for Childhood Arrivals (DACA) program, which provided temporary protection from deportation and work authorization for undocumented immigrants who arrived in the United States as children. The administration also made it more difficult for people from certain Latin American countries to obtain visas and green cards (Shear–Hirschfeld Davis 2017).

Trump administration made efforts to pressure Latin American countries to cooperate with U.S. immigration enforcement efforts. The administration threatened to cut off aid to countries that did not do enough to prevent their citizens from illegally immigrating to the United States. In 2019, the administration also signed a controversial agreement with Guatemala (Reuters Team, 2019) that allowed the United States to send asylum seekers to Guatemala to seek protection there instead of in the United States (BBC News, 2020).

Comparison

The immigration policies of the Obama and Trump administrations for Latin America were markedly different in their approaches to undocumented immigration, border security, and legal immigration. The Obama administration implemented the Deferred Action for Childhood Arrivals (DACA) program in 2012, which allowed

undocumented immigrants who arrived in the United States as children to apply for protection from deportation and work authorization. The program was later expanded to include parents of U.S. citizens and lawful permanent residents. The Trump administration, on the other hand, ended the DACA program in 2017 and implemented a “zero tolerance” policy that led to the separation of families at the border (Shear–Hirschfeld Davis 2017).

Both administrations prioritized border security, but the Trump administration focused heavily on building a border wall along the U.S.–Mexico border and increasing funding for border security technology and personnel. The Obama administration also increased border security funding and personnel but focused on strengthening relationships with Latin American countries to address the root causes of illegal immigration (Acosta–Collinson 2014).

The Obama administration supported comprehensive immigration reform that would have provided a pathway to citizenship for undocumented immigrants and increased legal immigration from Latin American countries (The White House, 2017). The Trump administration, on the other hand, implemented policies to restrict legal immigration from Latin America and made it more difficult for people from certain Latin American countries to obtain visas and green cards (BBC News 2020).

The Obama administration made efforts to strengthen relationships with Latin American countries and address the root causes of illegal immigration, including poverty, violence, and corruption (Brookings Institution 2015). The administration provided aid to countries in the region to support economic development and security (BBC News 2020). The Trump administration, on the other hand, made efforts to pressure Latin American countries to cooperate with U.S. immigration enforcement efforts and threatened to cut off aid to countries that did not do enough to prevent their citizens from illegally immigrating to the United States.

Conclusion

The immigration policies of the Obama and Trump administrations during 2015–2018 were vastly different, reflecting contrasting attitudes towards immigration and the role of immigrants in American society. Under the Obama administration, there was a focus on comprehensive immigration reform, which aimed to provide a pathway to citizenship for undocumented immigrants and address issues such as border security and visa backlogs. The Deferred Action for Childhood Arrivals (DACA) program was implemented, which allowed undocumented immigrants who arrived in the US as children to apply for protection from deportation and work permits. The Obama administration also prioritized the deportation of criminals and those who posed a threat to national security, while providing some leniency for non-violent offenders and families with children.

In contrast, the Trump administration implemented a series of restrictive immigration policies that targeted undocumented immigrants and refugees. The administration sought to increase border security through the construction of a border wall and the deployment of more border patrol agents. The administration also sought to restrict legal immigration through measures such as the Muslim travel ban and the termination of the Diversity Visa Lottery. The Trump administration also sought to eliminate the DACA program, which resulted in a legal battle that is ongoing.

The differences between the two administrations' immigration policies reflect different priorities and attitudes towards immigration. The Obama administration prioritized the integration of undocumented immigrants into American society, while the Trump administration prioritized the protection of American jobs and national security. These policies have had significant impacts on immigrants and their families, as well as on American society as a whole. While the Biden administration has sought to reverse some of the Trump administration's policies, the issue of immigration remains a highly divisive and complex issue in American politics.

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WARS, STATES, AND LIBERAL VALUES: RESHAPING THE INTERNATIONAL ORDER IN A GLOBAL WORLD

Radu-Sebastian Ungureanu

■ Introduction

■ Since the end of the Great War, the basic organizing principles of the international system have been those formulated by the American president Woodrow Wilson, the “archetype of the inclusive liberal in international relations” (Lascu-ettes 2020: 133). As an answer to the conditions of the moment (Lascu-ettes 2020: 132–163), the Wilsonian normative project aimed at building a peaceful world. The scope of the self-determination principle is ensuring the legitimacy of peaceful nation-states. They could thus work to avoid war and, if necessary, to jointly punish the warmonger in protecting the collective security. Though the age of extremisms, World War 2 and the bipolar confrontation challenged this liberal order at certain times, the decolonization process reinforced it, while the perils of nuclear confrontation made the idea of interstate war even more repulsive. Briefly put, the fundamental principles formulated one century ago are still the normative basis of the international realm, even if constantly adapted to a changing world.

Considering both its constancy and the dynamic inside the contemporary international order, the goal of the present paper is to investigate it, namely the impact of the current Russo-Ukrainian war. The paper thus first tries to offer some major analytical elements when discussing the changes of the international order from the end of the Cold War, when the Wilsonian perspective had a powerful general recognition. The impact of the globalization processes has revealed the progressive impact of the non-traditional threats, accompanied normatively by a cosmopolitan

approach, of Kantian inspiration. Therefore, the Ukrainian war indicates a new assertion of the Wilsonian conception, bearing an important globalist component.

The essential elements of the international order

In a famous definition, Hedley Bull says that international order is “a pattern of activity that sustains the elementary or primary goals of the society of states, or international society” (Bull 2002: 8). The study of such arrangements being one of the main preoccupations of Bull’s English School this approach is a natural starting point for this paper. As my intention is to question the present tendencies, rather than test a peculiar epistemological point of view, I will parsimoniously use some major tenets of the English School and, as I will argue, constructivism.

The English School places itself between realism and liberalism, between selfishness and goodwill (Jackson–Sørensen 2013: 133), so both the significance of the power distribution and the role of the ideas are relevant when discussing international order. In the following pages, I will consider it as dynamic. Bull does not address how the international order is changing, Flockhart even saying that “his analysis become *de facto* static”, due to the stability of the institutions (Flockhart 2022: 27). However, as any student of sovereignty or war can notice, these ideas are continuously reshaped. I therefore borrow the ‘change’ argument from a constructivist perspective, option justified as the links between the English School and constructivism were often noticed (Reus-Smit 2002; Flockhart 2022). Finnemore’s study concerning interventions is an eloquent constructivist discussion in this sense (Finnemore 2003).

Even if the globalization processes amend sovereignty, states preserve the responsibility to manage the security issues. The relations between great powers – dealt with through mechanisms such as balance of power, the politics of spheres of influence, or concert (Bull 2002: 200) – affect the general order, inside which international security is handled. The closer they are to common action, the more important the normative dimension becomes. If a balance is indifferent to norms, operating inside any international system, a concert needs them when defining the common Good to be jointly pursued. A concert (and a workable system of spheres of influence) can only be built inside what Bull calls an international society – a group of states, conscious of common interests and common values [...] conceive themselves to be bound by a common set of rules in their relations with one another” (Bull 2002: 13).

Briefly put, I consider that three major elements describe an international order at a given moment. The power distribution is important when defining the structure of the system, the big ideas are relevant for understanding the interactions among states, while the major events, processes and phenomena reveal its dynamic.

This paper is written in March 2023, when major events are still ongoing, leaving no other option than to consider an interpretative stance, consistent with both

the English School and constructivism. The lack of important reliable information imposes a precautionary attitude, so that the inquiry may aspire at most to indicate as plausible certain directions for the foreseeable future. Bull himself would probably endorse such an attitude, as he stated, in the debate with the behaviourists, that 'Thinking is also research' (Holbraad 1990: 193).

The 1990s: from Wilsonianism to cosmopolitanism in a multilateral era

Huntington coined the term 'uni-multipolar system' for describing the power distribution in the post-Cold War era (Huntington 1999). The term itself is suggestive, simultaneously pointing to the status of the 'lonely superpower' enjoyed by the United States, and the presence of other major actors in the system. The liberal values, in American terms, offered the legitimizing background for the international order corresponding to this particular power-distribution. Wilson's legacy seemed then to come to fruition, and two examples suffice in this regard. The collective security principle was used to protect Kuwaiti independence from Iraq's aggression, while the self-determination principle was the basis for German reunification.

The Wilsonian conception of managing international security has the idea of peace between states at its core, legitimized by nations inside their borders. If the premise is not fulfilled, then this statist conception of security is useless in managing internal disputes. Therefore, the 1990's saw an enlarged version of international security. The humanitarian conception of the era, supported by what was called 'the Clinton doctrine', was destined to defend human rights all over the world even by force (Wittkopf et al. 2008: 68–69). The perspective was not exclusively American. In 1994, the UN Development Program coined the term 'human security' for emphasizing the necessity of centering the international security on the basic needs of individuals, simply because they are humans (UNDP 1994).

The enlargement of international security needed a compatible normative basis, so the Kantian rationale slightly replaced the Wilsonian one during the period. Both perspectives have peace as the core value, the former based on individual morality and rationality, rather than states. Together, the individuals form the largest political community possible, so the recognition of the universality of human rights is the dominant normative dimension of the globalization processes. The world not being conceived as divided into exclusive sovereign polities, a certain cosmopolitan turn took place inside the liberal order of general peace among states. The Kantian approach was possible under Wilsonian conditions.

A visionary scholar like Bull defined the individuals' 'world order' in the '70s (Bull 2002: 19–21). Other approaches, such as Linklater's, support the need of regarding humanity as a reference point (Linklater 1998). The changing and mutually influencing nature of normativity and political processes is widely commented.

Kaldor's 'new wars' concept not only recognizes globalization as a fundamental cause for non-Clausewitzian conflicts, but also for the spread of transnational attitudes in managing them, contributing to the development of the civil society inside the war-torn state as a condition for peace (Kaldor 2012). Putting the logic behind humanitarian operations in Bull's terms, the international society should work for the benefit of the world order.

Obviously, some states' behavior did not fit the normative stance supported mainly by the liberal West. The conflict between the states' particularistic logic and the cosmopolitan universalism became apparent in the very humanitarian interventions, which eventually opposed Yugoslavia's sovereignty to human rights principle during NATO's bombing campaign in 1999 (Wittkopf et al. 2008: 85–88). *The Responsibility to Protect (R2P)* resolution, adopted at the 2005 World Summit, tries to solve this dilemma. The doctrine, while recognizing states' responsibilities to protect their citizens, stipulates that the international community is entitled to interfere if one of them is unable or unwilling to secure its population (UNGA 2005). The above dynamic regards the systemic order and should not be considered unique or evenly spread, but only a tendency supported by liberal societies. The dismantlement of the USSR put Russia, its main heir, in the situation of redefining the political community it represents and its international attitude. Russia assumed a role of managing what it considered to be its natural sphere of influence in a manner that I defined somewhere else as a Power-Oriented Post Imperial Order (POPIO), built to the benefit of the former metropolis - opposed to a Norm-Oriented PIO, oriented to the advantage of the former dominated society (Ungureanu 2011). By declaring a right of protecting the Russian-speaking communities abroad or unilaterally assuming a peacekeeping role in post-Soviet area, Russia used the rationale of the general order in a particular manner, closer to the old-style imperialist, unilateral policies than to the cosmopolitan multilateral ones.

The 2000s crises: reassertion of statehood

The terrorist attacks in 2001 mark the moment when the states tried to control the most unintended consequences of globalization. At least some of these 'non-traditional threats' (Terriff et al. 1999) were to be addressed with states' traditional means.

In Bull's rationale, the Global War on Terror is consistent with the idea of international society, as states protect their first goal of maintaining exclusive memberships (Bull 2002: 16). They commonly defend the very feature of their statehood, the monopoly on legitimate violence, refusing other actors any claim in this area. In 2008's global financial crisis, the great economic powers took the responsibility to commonly rule over the general conditions, forming G20. Three things are interesting to note about G20. Firstly, all major economies, no matter the nature of their domestic regime (unlike G7), take part in it. Secondly, all participants declare their

trust in the liberal principle of free trade. Finally, the sovereignty norm is relaxed, as the EU is part of the arrangement (G20 2008). The early 2000s' saw several manifestations of the concert of power, generally enjoying the support of the rest of the international community, as in the case of the Libyan intervention, made on R2P logic (UNSC 2011). However, for the Syrian war, begun in 2011, the great powers have not reached a common position.

There is not only one direction in the tendencies inside the international order. In 2003, the US-led intervention in Iraq was legitimized by liberal-based arguments, such as punishing a rough state or freeing people from a dictatorship. In this manifestation of "Wilsonianism with teeth" (Mearsheimer 2005: 1), unipolarity (considered as such, even if it was actually a multilateral intervention) allowed peculiar ideological convictions to provoke the generally agreed norms of intervention. The intervention marked the nadir of America's popularity in all post-Cold War era. The US failed to obtain a UN authorization, its allies were divided into opponents and supporters of the intervention (Gordon-Shapiro 2004), and tens of million protested against the war all over the world (Verhulst 2010). The normative and political imbroglio lasted, at least nominally, until August 2003, when the UN Security Council, welcoming the formation of an Iraqi Governing Council, also established an Assistance Mission (UNSC 2003).

If the American interventions of the era had a liberal foundation, the Russian challenges to the international order make sense in the POPIO rationale. In 2008, it intervened in Georgia in a 'peace enforcement' labelled military operation and unilaterally recognized the secessionist Abkhazia and South Ossetia. In 2014, it went even further in provoking the currently accepted general norms, by annexing Crimea. J. Kerry, the US Secretary of State, called it "an incredible act of aggression", as Russia behaved "in a 19th century fashion" (VOA News 2014). The crisis marked a reassertion of sovereignty as the basic norm for international order, while, in political terms, it signaled that even a great power can be subject to international (or, actually, Western) sanctions, aimed to punishing its behavior (Åslund 2019). It was a major crack among the great powers in the post-Cold War era, heralding the end of the concert.

Following this direction announced by the great powers actions, an increasingly statist conception on security became apparent in the crises of the second part of the 2010s. The management of the non-traditional threats confirmed the significance of statehood. During the 2015 refugee crisis, some EU states reaffirmed the role of borders. In the management of the pandemic, the first crisis that affected virtually simultaneously and with equal force all societies, governments all over the world appealed to extraordinary measures. The 'state of exception' justified measures beyond the regular institutional framework.

The pandemic had a powerful impact on societies, states and the globalization processes. Until now, in more than 760 million cases, almost 7 million lost their lives (WHO 2023). In 2020, the value of the global trade was about 9% (USD 2.5 trillion) lower than in 2019 (UNCTAD 2022a: 6). The international security landscape

suddenly changed, due to the general anxiety – ISIS instructed its adepts to avoid travelling to affected areas (Harper 2020) – and states’ policies.

In this context, the great powers tried to end the long-term interventions justified by the fight against terrorism. After two decades, the American-led coalition left Afghanistan. The initial reason for the intervention (to ensure that this country is not a safe harbor for terrorist groups) was supposedly reached. However, the very fact that the Taliban, the group defeated in 2001, returned to power in a matter of hours in 2021 signals a certain failure in other respects. In 2022, France ended its intervention in Mali in a similar manner.

The Western great powers apparently abandoned the use of violent means in fighting terrorism abroad during the pandemic, and, partially and symbolically, even withdrawing from Third World countries. In turn, they dedicated their energies not only to combating the pandemic and its effects, but also to offering help in this regard. For OECD, an increase of 4.4% in official foreign aid to developing countries from 2020 to 2021 is explained mostly through the help provided for fighting the pandemic (OECD 2022).

Briefly put, the pandemic had the effect of making the states more prone to asserting their control over societies, while abandoning external military involvement. At the same time, this ubiquitous threat made the states contemplate their duty to cooperate in order to cope with this unprecedented danger.

2022: The Russo-Ukrainian War and the Wilsonian re-turn

The Russian war on Ukraine suddenly challenged the cosmopolitan optics on the world, more or less assumed by the states, as the peace among states was broken. I suggest that the aggression reinforced the general reorientation to the statist conception of the international order, without abandoning the global dimension. The following discussion is made on three tiers, watching first the Russian rationales, then the answers offered by the international community, and finally addressing the attention given to non-traditional threats.

The Russian justifications

In the days prior to war, Russia unilaterally made some steps in order to ensure a certain legalistic framework. It recognized the two ‘people’s republics’ of Donetsk and Luhansk, then concluded assistance treaties with them, and after that invoked the right to self-defense in order to protect them against an alleged Ukrainian aggression. A speech given by Russia’s president, V. Putin, on February 24, the very day when the intervention began, offers the legal arguments and some other reasons for it, such as preventing a genocide or protecting the compatriots (Putin 2022a). Even if none of Russia’s explanations seems to fulfill the pro-

visions of the international law (Värk 2022), it should be noted that Russia made efforts of appearing to respect the Wilsonian order. Even the expression ‘special military operation’ used to describe the invasion is eloquent in this regard – in a pacific world, war is illegal.

Anyway, Russia justified the war in various ways. In the already mentioned speech, V. Putin referred to NATO’s expansion eastward as “a policy of containing Russia [...]. For our country, it is a matter of life and death, a matter of our historical future as a nation”, and he mentioned that “we will seek to demilitarise and denazify Ukraine”. These two narratives are connected, as “Focused on their own goals, the leading NATO countries are supporting the far-right nationalists and neo-Nazis in Ukraine” (Putin 2022a). D. Medvedev, former president and prime minister, current deputy chairman of the Security Council, added that “Russia is fighting a sacred battle against Satan” (Reuters 2022). There were no more details in this particular direction, but Putin declared, one year after the start of the war, that “Millions of people in the West realise that they are being led to a spiritual disaster” (Putin 2023).

All three philosophies of war distinguished by Rapoport – the political, eschatological and cataclysmic (Rapoport 1968) – are used in the Russian narrative. The first two are identifiable in the mentioned speeches, while the nuclear argument would cover the third. Putin stated, in a clear allusion to this possibility, that “In the event of a threat to the territorial integrity of our country and to defend Russia and our people, we will certainly make use of all weapon systems available to us. This is not a bluff” (Putin 2022b). However, in an effort to calm the spirits, the presidential spokesman D. Peskov said that “emotions must not prevail” (TASSa 2022). The ambiguity of the issue continues as Russia decided to suspend its participation in the New START treaty on February 22, 2023. While explaining this measure as caused by the support offered by the Western nuclear powers to Ukraine, Russia also stated that it “will continue to adhere to the quantitative restrictions enshrined in New START” (TASS 2023a).

The simultaneous use of different philosophies obviously explains a certain inconsistency in Russia’s war objectives, visible on the battlefield. It also suggests three major interconnected, hierarchically organized rationales for challenging the international order. The most important one is the denouncement of unipolarity, which asks for a re-affirmation of Russia’s power. The release from the supposedly unfair consequences of the end of the Cold War and dismantlement of the USSR would demand the denial of Ukraine’s sovereignty. The second reason, the denazification (and “fight against Satan”) aims at ensuring the moral status of resisting the Westernization. These two goals are pointing to a mythical ‘golden age’ of Russia’s position and freedom of action. As an instrument to achieve them, the nuclear rattling is “not a bluff” – Russia is determined to pursue these objectives and any attempt to stop it implies risking Armageddon...

The international community's replies

Russia's aggression pushed the international community to protect its fundamental norms. As no common action is possible under the UN Charter due to Russia's veto power in the Security Council, only the possibility of a moral condemnation remained. On March 1, the General Assembly affirmed "its commitment to the sovereignty, independence, unity and territorial integrity of Ukraine", condemned in "the strongest terms the aggression" and asked Russia to "immediately, completely and unconditionally withdraw all of its military forces from the territory of Ukraine" (UNGA 2022a). On October 12, the same forum declared that the referenda staged by Russia in four Ukrainian regions are 'illegal', thus dismissing its claims of territorial aggrandizement (UNGA 2022b).

The two resolutions obtained virtually the same results (141 in favor, 5 against, 35 abstentions and 12 absents, and 143, 5, 35, 10, respectively). Belarus, North Korea, Nicaragua, and Syria opposed, alongside Russia, states which nowadays can be regarded either hugely indebted to Russia, or sharing its views regarding the desirability of the present international order. The abstaining and absent states are countries from the Third World, including some former post-Soviet republics and three of BRICS members (India, China, and South Africa, while Brazil voted in favor in both cases). These three 'alternative giants', theoretically the most interested in a multipolar world, the basic Russian narrative, preferred to refrain from voting. China's position in particular deserves some comments.

China is, one can say, caught between two different imperatives. A traditional leader of the Third World, it consistently protected the sovereignty norm, to which these countries are particularly sensitive. More importantly, it needs this argument to push its Taiwanese claims, so China cannot ignore its fundamental role as guardian of statehood and territorial integrity. Politically, a good relation with Russia is, nevertheless, of major importance, mainly due to the common opposition to the American/ Western hegemony. On February 4 2022, the leaders of Russia and PRC declared that "Friendship between the two states has no limits" (TASS 2022b). In 2023, PRC issued an official position proclaiming, at §1, the necessity of "Respecting the sovereignty [...] of all countries". The declaration does not necessarily represent a support for Ukraine, as Russia claimed annexation of Ukrainian regions, but more a reassertion of its long-standing position on this issue. It plainly discourages Russia's ambiguous nuclear position by stating "The threat or use of nuclear weapons should be opposed" (§8). The signs of the friendship are best identified in §2, "The security of a country should not be pursued at the expense of others", a reference to the justification of war, and §10, "Stopping unilateral sanctions" imposed by the West on Russia (MFAPRC 2023).

Most countries condemned the aggression and the so-called referenda, aimed at legitimizing the annexation. The 'collective West' (term used by Putin himself – Putin 2022a), under a strong American leadership, coordinated the widespread moral condemnation. If for the general attitude of the international community

a Wilsonian perspective of protecting peace suffice, this proactive stance asks for a more profound liberal perspective, such as the Kantian 'democratic peace' discussed by Doyle (Doyle 1983). However, the details are important, and this explanation seems to have some flaws, not all democracies embracing the same position. The assertive attitude of the 'collective West' makes more sense when considering this group a 'security community', as defined by Adler and Barnett in a constructivist perspective, since it assumes the common identity of its members (Adler & Barnett 1998). Nevertheless, these normative and sociological epistemic references may actually reinforce each other, as proved by Risse-Kapen (Risse-Kapen 1996).

If the Western interpretation looks dominant in the moral component of the present international order, it is obvious that Russia is losing in terms of power distribution. Its claimed exclusive sphere of influence seems to be in a state of disarray. Out of several examples, two seem clearer in this respect: Armenia refused to host CSTO military drills (ArmenPress 2023), while in Central Asia, China stepped in to support Kazakh sovereignty (MFAPRC 2022). Strategically, if Finland and Sweden will join NATO, as foreseen, Russia will share more than 1300 kilometers of border with its nemesis and, even worse, watch how the Baltic Sea comes under the control of the Alliance. A war intended to stop NATO's enlargement and strengthen Russia has in reality the opposite effects.

Russia seemed to worsen its situation by starting the war. It produced an unconvincing narrative and showed poor military performance, while its strategic position suddenly deteriorated. Russia looks, due to its structural conditions, ill prepared to face dramatic changes. Its economy is now under the blow of the sanctions. Politically, this conservative, populist, and personalistic autocracy (Fish 2017:61) appears to face some new difficulties, as shown by the rise of the non-state military actors. Avoiding further speculation, all these signs may point to a rather grim future for Russia and its international posture.

Addressing global challenges during the inter-state war

In this collapsed concert of power, the question of the global problems remains. "Today you have a huge number of countries in Africa, Asia, Central America, Latin America, the Caribbean, Pacific who feel that our issues are being put on the side and the entire oxygen is being sucked up by the Ukraine conflict", affirmed S. Jaisankar, the External Affairs Minister of India (Print 2023). I suggest here that, even if it is obvious that the war in Ukraine is nowadays, at least for the global North, the first point on the agenda, the transnational challenges have a certain weight in reshaping the international order. These areas ask, I suggest, for a reassertion of the cosmopolitan approach, in various proportions.

The consequences of war spread well beyond the battlefield, so that many non-traditional threats became apparent. Migration, food security and energy are three examples in this respect.

UNCHR estimates, as of February 2023, that there were more than 8 million refugees only in Europe (UNCHR 2023). The drama of these people has profound effects on the societies receiving them. The help provided, by offering shelter and humanitarian aid, proves that the cosmopolitan attitude is actually enforced, not weakened. The transnational civil society mobilized to fight the sufferance of those affected by war, and asked states to take action in this direction. Hence, the Wilsonian orientation did not replace the Kantian one, but became more visible.

The other two mentioned fields need a more nuanced approach. The Black Sea Grain Initiative, signed in July 2022, is a singular example of cooperation between the warring parts, mediated by Türkiye, under the aegis of the UN. It intends to answer the kind of preoccupation expressed by the Third World countries. Not letting all 'oxygen' be aspired by the Ukrainian war means, in this case, averting the risk of famine in the global South, thus addressing a basic human need. The direct interest of Ukraine – to restart the much-needed exports for its strangled economy – was, supposedly, an important factor in placing the issue on the international agenda. A similar Russian desire made the agreement possible (UNCTAD 2022b).

As for energy, discussing it as a security issue in the current war demands both a strategic and an environmental dimension. The green transition and the necessity to frustrate Russia of its leverage on European affairs are simultaneously tackled in the REPowerEU plan, prepared by the European Commission in May 2022 (EC 2022). In February 2023, the EU, G7 and Australia formed a 'Price Cap Coalition' to limit the revenues of the Russian war chest provided by the export of gas and oil (EC 2023). This Coalition is, basically, the security community acting in the energy sector.

Conclusions

The paper intends to investigate the present dynamics of the international order, using Hedley Bull's influential work as starting point. Emphasizing here the changes of international norms, the liberal values offered the world's common moral basis in the decades following the end of the Cold War. A Wilsonian conception of security, insisting on interstate peace, powerful at the beginning of the period, was slightly replaced by a cosmopolitan one, of Kantian inspiration, as globalization revealed new challenges. In time, a more statist conception on security has begun to resurface. The pandemic was relevant for the significance of nontraditional threats, while its control was a litmus test for statehood.

The Russo-Ukrainian war sent a shockwave in the whole world, as it recalled the spectrum of the interstate war. The Wilsonian direction regained its full significance, with a Kantian nuance given mainly by the attitude of the transnational

civil society. Over all, it seems that that the liberal values remain, for the foreseeable future, the foundation of the international order.

Some recent developments indicate that, one year after the beginning of the war, the belligerents are aware of the moral pressure they have to face. Recently, Russia addressed the nuclear issue in a clearer way, by stating, together with China, that the nuclear war “must never be unleashed” (TASS 2023b), a declaration that should have the role of calming the world. The idea that the present reshaping of the international order offers special attention to global human security is supported by the extension of the grain agreement, in particular designed to address the danger of famine in the Third World (UNSG 2023). As already noticed, the Kantian and Wilsonian liberal perspectives actually intermingle, the current statist direction being only a tendency.

As for the power distribution, it is impossible to discuss now issues like the future polarity of the system. For the moment, it is reasonable to say that Russia seems to be a declining great power. The war has revealed this country’s unexpected weaknesses, and its claimed exclusive sphere of influence is diluting. Without referring here to the material elements of power, one can say that Russia’s moral isolation places it on the fringe of the international society. As D. Medvedev admits, “now, for the first time in at least 150 years, we are alone” (NEXTA 2023). By contrast, the ‘collective West’ is more cohesive than ever, and its interpretations are hard to reject even by less sympathetic countries.

Lastly, I should add that the considerations above should not be deemed as absolute. I only suggest here some tendencies, as observable and interpretable today. As it has been proven so many times, the incredible complexity of the social realm can invalidate any prediction.

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THE „FREE AND OPEN INDO-PACIFIC” STRATEGIC CONCEPT: A TRANSCENDING AMERICAN FOREIGN POLICY DIMENSION DURING DONALD TRUMP ADMINISTRATION (2017–2021)

Anca Vasilache

Introduction

■ The instrumentalization of the strategic foreign policy objectives of the United States, within the American geopolitical device in the Asia-Pacific area, is achieved through a policy of orientation towards China, which transcends the latest American presidential administrations.

One of these policies was formulated in 2017 in the National Security Strategy of the United States (NSS) that stated the aim of the Trump administration to rethink the previous policies of past two decades that advocated on the inclusion of competitor states in the global trading system and in the international institutions, initiatives that would turn rivals into “benign actors and trustworthy partners.”¹ The NSS 2017 pleaded for integrated regional strategies of collective cooperation formats able to address the multitude of new geopolitical challenges, naming China and Russia’s aspirations to project power worldwide and to alter the regional balance of power. The objective of securing a U.S. led networked security architecture, built up through bilateral and multilateral security relations and capable of ensuring a free and open Indo-Pacific space, was mentioned in the 2018 US National Defense Strategy.

A year later, the strategy was crystallized through a programmatic document of the U.S. Department of Defense, “Indo-Pacific Strategy Report. Preparedness, partnerships, and promoting a networked region” from June 2019. The document laid out the directions for a strategy that used a concept created a few years earlier by

the Japanese government, the Free and Open Indo-Pacific Strategy² (FOIP), focused on maintaining the regional status quo through strengthened alliances and improved partnerships, having ASEAN at its core and the United States as prevalent power in the region (ASEAN also launched its Indo-Pacific strategy in June 2019³).

The Free and Open Indo-Pacific Report revealed the Trump administration's vision for a globally oriented regional strategy to respond to the rise of China, including the primary objective of ensuring a free and open regional order in the Indo-Pacific necessary to maintain a balance of power favorable to the United States and to the democracies of the region. In consideration of the regional challenges posed to the United States in the region, mainly due to the China's aim to develop a Sinocentric sphere of influence, the strategy puts a strong emphasis on the respect for a rules-based order and for norms of the international law, as well as the freedom of navigation and overflight, all necessary for a political, economic and security environment that protects sovereignty of states and ensures free flows of goods and services.

A few key directions of the policy are outlined by their similarity with the Rebalance to Asia lines of action, of which one obvious resemblance is represented by the U.S. enhanced engagement in the region, the importance given by both strategies to regional alliances and partnerships, as well as the active contribution of the United States to competing or leading multilateral organizations and a strong U.S. military presence in the region.

The implementation update of the FOIP policy issued in November 2019 stated an enduring prerequisite of its operationalization – not to force the states of the region to choose between partners, most probably in response to the growing preoccupation of the countries in the region and of ASEAN to avoid being caught in the U.S.–China rivalry. The premise was later taken up by the Biden administration⁴ in the Indo-Pacific Strategy and was often mentioned in statements and speeches of the U.S. officials⁵ regarding the American relations with the Indo-Pacific states.

Elements of the Free and Open Indo-Pacific policy

The “Indo-Pacific” concept, in diplomatic terms, was introduced by the Japanese Prime Minister Shinzo Abe in the Quadrilateral Security Dialogue context,⁶ denoting the area between India, the countries of Southeast Asia and the seas from the eastern Indian Ocean to the South China Sea inclusive. In the last years, the concept is used widely in the diplomatic language, but interpretations of the concept vary from country to country. In the Rebalance to Asia policy, the preferred term was “Asia-Pacific”, a region expanding from the Indian subcontinent to the western shores of the Americas, spanning the Pacific and the Indian oceans.⁷

The United States NSS Report from 2017 mentioned a geographic delimitation of the “Indo-Pacific”, as the region stretching from the west coast of India to the

western shores of the United States. Also, in his remarks on Indo-Pacific economic vision from July 30, 2018, Secretary of State Mike Pompeo mentioned that the Indo-Pacific extends from the United States west coast to the west coast of India.

The contour of the FOIP strategy has been traced in a chapter dedicated to the indo-pacific area within the NSS 2017, where it becomes evident the importance given by the United States to strengthening political, economic and security relations with allies and partners of the region and the need to identify new partners that may contribute to a common response to the increasingly assertive commercial practices, trade tactics, maritime militarization and sea claims of China. The document sets political, economic and military priority actions that are presented in general terms, mentioning the perpetuation of the United States military presence in the region and the encouragement for developing a strong collective defense network.

At the APEC CEO Summit in November 2017, held in Vietnam, President Donald Trump indicated some coordinates of the Indo-Pacific strategy that were about to be put into operation while referring to future ways of establishing trade relations in the Indo-Pacific. The strategy favored bilateral partnering with nations willingly to abide by reciprocity and fair trade principles, while the U.S. practice of concluding large trade agreements was to be abandoned.

The economic vision of the strategy has been summarized by Secretary of State Mike Pompeo in July, 2018, consisting of fair and reciprocal trade, open investment environments, transparent agreements between states and improved regional connectivity through open access to seas and airways.

In November 2018, Vice President Mike Pence offered an indication about the progress in achieving the FOIP vision, reporting increased financing capacity for infrastructure projects and foreign military financing in the region and new substantial business investments, emphasizing on bilateral trade agreements.⁸

Another key direction of the strategy has been presented by the Assistant Secretary of Defense for Indo-Pacific Security Affairs Randall Schriver in March 2019, expressed by the need to sustain the influence of the United States in the region through three lines of effort: building a more lethal force, strengthening our alliances and partnerships and reforming the Department of Defense's business practices, considered the "most effective avenues for addressing growing strategic competition with China and Russia."⁹

The "U.S. Strategic Framework for the Indo-Pacific", from 2018, declassified in January 2021, is considered the implementation guideline¹⁰ for the NSS 2017 and largely a precursor for the FOIP Strategy from 2019, which placed China at the center of American foreign policy focus and drew the lines of effort directed towards promoting the American interests in the Indo-Pacific and to prevent China "from establishing new, illiberal spheres of influence", based on several assumptions including that of China aiming to dissolve U.S. alliances and partnerships¹¹ in the region.

The "Indo-Pacific Strategy Report. Preparedness, partnerships, and promoting a

networked region” from June 2019, which represents the formal document at the bottom of the Free and Open Indo-Pacific strategy and the “Free and Open Indo-Pacific. Advancing a Shared Vision” report from November 2019 together reflect the U.S. strategic approach of the FOIP policy.

The first document (the “Report”) is extensively approaching the policy’s principles based on respect of sovereignty, fair and reciprocal trade, adherence to international law, including freedom of navigation and overflight and peaceful resolution of disputes. It frames its terminology in the realm of Realism, naming China “a revisionist power” and depicting its ways to achieve “regional hegemony in the near-term and global preeminence in the long-term”, in the meantime stating that “no one nation can or should dominate the Indo-Pacific” in recognition of the challenges posed by the shifting regional balance of power.

Three lines of effort are required to the implementation of the strategy: 1) military and cybersecurity preparedness of the United States and its allies and partners to respond to potential threats and challenges in the region, including disaster response; keeping a credible U.S. military presence in the region in order to deter aggression; increased investments in military capabilities, including U.S. military’s equipment and infrastructure; building the capacity of allied and partner nations to contribute to regional security; 2) modernizing existing alliances, strengthening partnerships, revitalizing engagements in the Pacific Islands and building new security partnerships with other states in the region in the security area; increasing economic cooperation and integration in the Indo-Pacific region and building economic partnerships with regional allies and partners in the region in order to promote trade and investment in the economic area; promoting educational and cultural exchanges and enhancing civil society and promoting democratic values in the inter-personal relations area; 3) promoting a networked region – enhancing greater regional connectivity and integration among the countries of the region through investments in digital and transportation infrastructures and energy base in order to facilitate trade and development of the region.

Several trends are indicated in the Report, as shaping the region, primarily focusing on China’s rise as a global power, in addition to North Korea’s nuclear program and the increasing importance of cyberspace and the outer space.

It must be mentioned that the document differentiates between China and the PRC in governmental sense when referring to the alleged mistreatment of Muslim ethnics in Xinjiang, a semantic custom that was subsequently nuanced by a number of U.S. officials in the current Biden Administration¹² in order to distinguish between the Chinese establishment and the Chinese people and society.

The “Free and Open Indo-Pacific. Advancing a Shared Vision” report from November 2019 completed the strategy vision, reaffirming the need for protection of the states’ sovereignty from coercion by other countries, good governance and respect for the fundamental rights and liberties.

While the Report from June 2019 outlines the critical significance of the trilateral partnerships and strengthening of the regional institutions, its update from

November 2019 underlines the importance given to bilateral relations and puts ASEAN at the center of the regional architecture on a rules-based foundation. It also introduces the “minilateral” agreements, as instruments for coordination with partners of like mind. However, the two documents offer no indication of a broad agreement with the nations of the region on the scale of President Obama’s Trans-Pacific Partnership Agreement.

Distancing from Rebalance to Asia policy and yet

Considered by many the most visible element of the Rebalance to Asia strategy of the Obama Administration, the Trans-Pacific Partnership Agreement (TPP) was the element best qualified to be altered with the assumption of the mandate of President Donald Trump in 2016, who proposed a detached distance from the policies of the previous president, Barack Obama. From the very first day of his mandate, President Trump signed a Memorandum¹³ regarding the withdrawal of the United States from the TPP, one of the main pillars of the Asia-Pacific rebalance policy, however noting that the United States agreed to join the Agreement in 2008 during President George W. Bush second mandate.

According to his repetitive statements during the presidential electoral campaign, President Trump has apparently abandoned the pivoting policy to Asia of the Obama administration and implemented the Free and Open Indo-Pacific (FOIP) concept. The strategy – expressly addressing the strategic competition with Beijing – is based on the U.S.’s strategic alliance primarily with Japan and with other regional allies: Australia, South Korea, The Philippines and Thailand and sets objectives like strengthening partnerships with other countries in the Indo-Pacific, such as Singapore, New Zealand, Mongolia, India, Sri Lanka, The Maldives, Bangladesh, Nepal and the island of Taiwan and expanding partnerships in Southeast Asia with Vietnam, Indonesia, Malaysia and other countries of the region.

It is true that the FOIP policy was articulated in the two extensive reports whilst the Rebalance to Asia strategy was never transposed in a dedicated official document (except for the military dimension¹⁴) and its decryption was subject to numerous interpretations and critics. However, many applications of the two strategies are relevant to identify a number of differences.

The Rebalance to Asia policy seems to have been oriented towards signaling the need for a better inclusion of China in the American regional strategy in order to insure fair competition, compliance with the norms of international law and observance of the existing regional order (the TPP negotiated during President Obama’s second term in office did not include China though, indicative of the adjustments in the strategy signaled by experts¹⁵). In this respect, the U.S. and China maintained a stable relationship up to the highest level and President Obama met the Chinese leader Hu Jintao eleven times¹⁶ during the latter’s mandate (that ended in March 2013) and Xi Jinping had two meetings with Barack Obama in his first

year as president of the P. R. C. and several meetings in the following years. On the other hand, FOIP appeared to be a rather exclusive policy, placing China at the core of its security concerns as a revisionist power, seeking „to reorder the region to its advantage.“¹⁷ In application of the FOIP strategy, president The Trump initiated a series of measures (named by the international media “trade wars”) materialized by trade confrontation with China through custom taxes surcharge for certain goods imported from China. A large number of experts considered that such steps did not produce the desired effect, as China reciprocated the overtaking system and even moved production in the U.S., repatriating profits to China.

The rhetoric used to formulate the FOIP strategy is clearly aimed at China, in contrast to the statements during the Rebalance policy, which indicate the reorientation of the U.S. foreign policy towards the Asia-Pacific region, while attempting to coddle the U.S.–China relations.

The FOIP strategy targeted a wider geographical area than the Pivot, expanding beyond the traditional sphere of interest of the United States, actively including India in cooperation on multiple levels. Earlier, the Pivot could not coagulate a viable format that included India, in part due to Australia’s exit from QUAD¹⁸ when Prime Minister Kevin Rudd took office in 2008.

The Rebalance to Asia policy is focused on strengthening alliances and partnerships with countries in the region and multiple visits have been made to this purpose by high rank U.S. officials in Japan, South Korea and Australia. In the meantime, the FOIP policy also recognizes the importance of alliances, but places greater emphasis on building partnerships with “like-minded partners”¹⁹ who share democratic values, in particular with India and ASEAN nations.

Also, the FOIP strategy places greater emphasis on promoting a rules-based order, including respect for international law and the freedoms of navigation and overflight. The Rebalance to Asia strategy placed greater emphasis on strengthening multilateral economic ties with the region, materialized mainly through the TPP Agreement. The infrastructure projects under the Pivot have been modest and less successful²⁰, such as *Indo-Pacific Economic Corridor (IPEC)*. The economic investments were concretized in instruments like the *Lower Mekong Initiative (LMI)* - concentrated on cooperation in the areas of environment, health, education and infrastructure development, the enduring initiative *U.S.-ASEAN Expanded Economic Engagement (E3)* regarding trade facilities and increased regulatory coherence between the nations of the region. More consistent under the Pivot are the military projects in Japan, South Korea, in Guam for the relocated troops from Okinawa²¹ and the developments under the *EDCA (Enhanced Defense Cooperation Agreement)* – an agreement remaining in force in enhanced version to this day, concluded between the United States and the Philippines that allows U.S. military access and use of the Philippine military bases. On the other hand, the infrastructure investments have been set as a priority of the FOIP strategy. The most notable achievements of the strategy count the *Blue Dot Network* – a certification system for infrastructure projects with high standards of sustainability and finan-

cial viability, *Asia EDGE (Enhancing Development and Growth through Energy)* – a U.S. government initiative regarding access and security for energy sources, which includes investments in energy infrastructure, such as liquefied natural gas LNG terminals, power grids and pipelines, *Infrastructure Transaction and Assistance Network (ITAN)* – launched in 2018 by the U.S. government, with the purpose to provide technical assistance and support to governments and private sector entities involved in infrastructure planning and implementation, *Digital Connectivity and Cybersecurity Partnership (DCCP)* – also a U.S. government initiative, promoting digital connectivity and cybersecurity in the Indo-Pacific region through investments in digital infrastructure (fiber-optic cables and 5G networks), or the *Indo-Pacific Transparency Initiative* encompassing more than 200 programs promoting transparency, good governance and anti-corruption in the region. In Southeast Asia, the Trump Administration maintained the “Freedom of Navigation” Program (FONOP), run under the American administrations ever since 1983, destined for the protection of lawful maritime global commerce and mobility of the U.S. forces at high sea and advocating against excessive maritime claims by states. Another program developed for the protection of sea lines of communication (SLOCs) in the high seas of South China Sea and the surrounding maritime area of South Asia, created in 2016 and developed under the FOIP strategy, is the ongoing *Indo-Pacific Maritime Security Initiative (MSI)*. In addition, under the FOIP framework, the *Quadrilateral Security Dialogue (QUAD)* was revived, an important regional mechanism for the U.S. on diplomatic and military levels, seeking to promote expansion of trade and investment among the four partners, address emerging challenges (cybersecurity, climate change public health issues – QUAD Vaccine Partnership was created on this scope), to promote maritime security and counterterrorism through joint military exercises and patrols in the region to increase interoperability, thus strengthening its relations with Japan, India and Australia.

But among contrasts and obvious differences between the two policies, some lines of similarity are observable, indicating continuity in core aspects, as the background for a grand strategy about to be put in place.

First, a look back to the two strategies reveals that both have been focused on China to a large extent and both acknowledge the growing Chinese regional influence, each formulating its terms in response to China’s rise.

The Pivot’s primary objective was to secure and sustain the United States’ regional leadership and interests²² in Asia-Pacific, as the “American leadership will remain essential to shaping the region’s long-term trajectory to enhance stability and security.”²³ Projecting a strong leadership of the United States to advance U.S.’s economic and national security interests²⁴ in the Indo-Pacific was a priority of the FOIP strategy.

Second, despite the clear diplomatic language used along the rebalancing policy and the more confrontational accent of the FOIP papers, the core idea of both strategies integrates in the great powers competition sphere, recognizing the strategic importance of the region for the United States. In this respect, the

FOIP policy states the aim of the United States to “remain the preeminent military power in the world”²⁵ and to ensure that the balances of power remain in its favor as “great power competition returned.”²⁶ Previously, referring to the Rebalance to Asia policy, President Obama named the United States a “Pacific power”²⁷ and admitted new challenges occur in the changing economic balance of power influencing the international affairs.²⁸

Thirdly, both strategies aimed at consolidating United States engagement in the indo-pacific region through cooperation with regional allies and partners, enhanced political and economic collaboration, and through strengthened security ties with states in the region. In Pivot’s terms, the treaty alliances with Australia, Japan, the Philippines, Republic of Korea and Thailand formed the cornerstone of the U.S.’s strategic position in the Asia-Pacific.²⁹ Also deepening partnerships with Indonesia, Malaysia, Singapore, Vietnam and India and strengthening unofficial relationship with the people of Taiwan³⁰ are mentioned as strategic objectives. It is relevant here to mention that diplomacy have been very active under the Pivot, many top U.S. officials making multiple trips to the region in order to address regional security challenges: visits of President Barack Obama, Vice President Joe Biden, Secretary of State Clinton, Secretary of Defense Chuck Hagel or Secretary of Commerce Penny Pritzker were largely documented by the media, particularly the extensive presentation of the Rebalance strategy made by Secretary of Defense Leon Panetta at the Shangri-La Dialogue in 2012). The vision of the FOIP places alliances and partnership with regional states at the very core of the strategy, focusing on security and economic cooperation, on information-sharing agreements and stressing on shared values with partners alike and compliance with a rules-based international order. Also, under the FOIP policy, partnerships have been expanded to India (e.g. U.S.-India 2+2 Ministerial Dialogue, initiated in 2018), to small countries of the region and to the Pacific islands (the Pacific Islands Dialogue was first-ever initiated in 2019).

Fourth, both strategies affirmed the ASEAN centrality and created or developed the United States’ contribution to regional organizations. Both the Pivot and FOIP showed strong support for ASEAN centrality in the regional security architecture and contributed to strengthening regional institutions through continuation of the U.S.’s multilateral cooperation with ASEAN and its different platforms, such as the Regional Forum (ARF), ASEAN Defense Ministers Meeting Plus (ADMM-Plus) and East Asia Summit (EAS), with Lower Mekong Initiative (LMI) and the APEC forum. Moreover, ADMM-Plus and LMI praised in the FOIP documents are initiatives launched under the Pivot policy of the Obama Administration.

Fifth, expanding economic and security partnerships through new regional agreements constituted a priority for both policies. Bilateral engagements (e.g. U.S.–Indonesia Comprehensive Partnership in 2010, U.S.–Korea Free Trade Agreement from March 2012, U.S.–Vietnam Comprehensive Partnership from July 2013, 2014 U.S.–the Philippines Enhanced Defense Cooperation Agreement, 2015 U.S.–Singapore Enhanced Defense Cooperation Agreement, Guidelines for U.S.–Japan

Conclusions

The Free and Open Indo-Pacific policy during 2017–2020 represents a set of multi-level strategies, manifested through a diversity of cooperation frameworks, private and public investments mechanisms and military activities based on the norms of international law, aimed at maintaining the customary rules of the current international order and at achieving the stated goal of the strategy: to preserve and enhance the United States leading economic position and political influence in the region. The FOIP strategy’s approach to the new challenges and adaptation to the new realities of the Indo-Pacific region is still debatable among scholars and public, but it reflects the U.S.’s foreign policy coordinates drawn by the Rebalance to Asia strategy of the Obama Administration modified by the touches of President Trump’s political vision regarding the vast area connecting the Pacific and Indian oceans. Moreover, several significant similarities of the 2019 strategy reveals that it attempted to clarify and to expand the American political view over the Indo-Pacific topics of the Pivot and succeeded in strengthening alliances of the United States with Indo-Pacific states, introducing, continuing or revitalizing cooperation formats beyond the San Francisco System, a scope also set by the Pivot. Nevertheless, the accelerating rise of China’s influence in the international arena has its distinct role in the consolidation of regional alliances and partnerships, particularly facing China’s territorial claims, assertive diplomacy and new debt repayment formulas or incisive trade practices.

This author considers that the declared aim of the FOIP strategy to constitute a substantially different policy from the Pivot and the distancing from such initially claimed by President Donald trump has not been entirely successful, as in many areas FOIP took over the mechanisms used by the Rebalance to Asia policy.

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THE WELFARE STATE THROUGH THE LENS OF THE SOCIAL INVESTMENT PERSPECTIVE: TRANSFORMATIONS AND CHALLENGES

Milena Hristova Yorgova

■ Welfare states in modern European societies face serious economic, political and demographic challenges. This requires them to make changes to their design and scope to respond to the changing structure of social risks on the one hand, and to ensure financial sustainability on the other. In recent decades, the debate on the necessary transformations has brought the perspective of social investment to the fore. This perspective has found a place in the EU's platform for inclusive and sustainable growth and has gradually made its way to nation states. This has influenced the way EU member states use social investment as part of the state's toolkit to address challenges through investment in human capital to enhance competitiveness; development of social services and policies to support the labour market: early childhood education and care; higher education and lifelong learning; active labour market policies; policies to support women's employment; and flexible security. The EU has used social investment as a cornerstone of the modernisation debate, presenting it as a core function of the welfare state in the 19th century, alongside labour market regulation and social protection (EC 2023: 1).

The welfare state: welfare orientations

Modern European societies have a market economy and a democratic political system. The market economy is regulated in accordance with the general level and development of political, civil and social rights. Citizens' social rights are protected

by a system of redistribution through the state which is socially justified and within acceptable limits for a market society at a certain stage of its development. This system limits the absolute freedom of the market in terms of its social effects and allows a certain degree of independence of individual existence from the real market position. It is the institutional result of social commitments by the state to intervene in or relate to the system of factors concerning the welfare of society. Established public institutions regulate both the income and behaviour of each individual in the event of risks such as unemployment, work accidents, sickness, maternity, advanced age, poverty, as well as some specific spheres of activity which, because of their importance for the individual welfare, must be protected to a certain extent. Such areas are employment, health, education, housing. In addition, the behaviour of communities (family and territorial communities) is also subject to regulation, so as to encourage the community to care for its own members and to be an effective source of security for them.

Also, European societies have adopted certain socio-political practices,¹ which are a product of the political process and are enshrined in legislation. According to the type of social benefits, socio-political practices are generally classified into:

- *Social practices* that support incomes (provide direct transfers in case of disconnection from work or in case of insufficient income). With regard to these, three strategies of social regulation have been adopted in modern market societies, which are not applied in a pure form. The first strategy is associated with the model of *social assistance*, where social transfers are received as a result of proven need. At the political level, the criteria against which the need is proven are fixed. Such a criterion is the level of income, defined as a limit consistent with some minimum standard of living in the particular society. Income fixation separates the social assistance clients from others. The second strategy is based on the social security model, where social transfers are based on the employment and labour market position. *Social security* as a socio-political practice guarantees individual existence in the event of interruption of employment. At the political level, the rules of access are fixed, which usually include certain parameters of the necessary employment, the way of recruiting the necessary resources, as well as the level of social benefits. The third strategy replicates the model of *universal transfers* based on citizenship. Universal social programs cover the entire population without setting conditions related to social status, previous employment or income. The access to them is a direct implementation of civil law. The universal principle of social regulation has been adopted by developed market economies, but it is more often used as an *adjustment* to social assistance and insurance programs and rarely as the main principle of an independent program.
- *Social services* (public non-market sphere with free/quasi-paid access to health-care, education, provision of housing, personal social services). These services outline the public sphere, which offers services not for money, but for recognized rights. The conditions of access to them are the same as for the income maintenance.

nance practices. They may follow the logic of social assistance, and in this case the outlined sphere of social services is intended for the socially disadvantaged. This logic usually follows the provision of personal social services. Social services can follow the logic of provision. In this case, the outlined public sphere is available only to those who receive insurance rights. Such is the logic of the prevailing health systems. Universal access is also possible, outlining a broad public sphere for the provision of services. The universal principle is usually embodied in educational systems. According to the type of the organization of the provision, social services can be organized directly by the state, by local authorities or by charitable or economic organizations that conclude contracts with public authorities for the implementation of a certain activity. In the first case, there are maximum conditions for expenditure control and mobilization of the funds necessary for development, but the funding of social services weighs entirely on the state budget. In the second case, decentralization is applied in the sphere of social services. In this way, it loses its equalizing effect and reproduces territorial-economic inequalities. In the third case, the state uses a privatization strategy to relieve itself of some of its social functions and transfer them to the private sector.

– *Social practices that support access to market positions* (employment policy, income policy, tax policy, price control, provision of education). They are aimed at creating conditions for successful market behaviour of individuals and easing and guaranteeing the access to favourable market positions. Employment policies occupy an important place here. They strive to maintain a balance between labour supply and demand. The unemployment rate is an indicator of the severity of the conflict between the interests of the people seeking work and the economy, which at any given time offers a certain number of jobs. The capacity of employment policies to correct unemployment is severely limited. Active and passive policies are used in different proportions in different market economies. Passive policies are related to the protection against the loss of employment income and relate to the amount of benefits and the terms and conditions for receiving them. Active policies concern the improvement of the opportunities for employment and self-employment; subsidizing the creation of jobs and employment for representatives of risk groups on the labour market; motivation and professional qualification for job seekers and the employed; implementing specific measures to encourage the adaptability of the employed. The active labour market policy is implemented by state employment agencies, which offer opportunities for inclusion in programs and measures for employment. In the short run, active policy measures affect incomes in a way, similar to passive policy cash transfers, but in the long run, the provision of subsidized employment, for example, can lead to higher individual incomes than social transfers. The long-term effects of the active policy are related to the reduction of labour resource losses. The various schemes help the unemployed to acquire skills for secure employment, to return to the labour market, to get out of the vicious cycle of “unemployment – unstable work – poverty – dependence on the state.”

There is no fundamental incompatibility between different socio-political practices. Various combinations are possible between them. As Braykova points out, "... the different, nationally specific is in the adopted organization of the protective scheme, in the specific technological forms and is a consequence of a number of random factors that have influenced their formation as a political decision" (Braykova 2000: 114).

Within the united European space, there are different variants of public organization of the social sphere, which outline different strategies of change and adaptation to the global environment, but also to the particularities of the specific society. The circle of decisions is determined by the economic characteristics that set the material opportunities of the society; the political features that reproduce the current political interests and power resources; the cultural characteristics that influence public attitudes and expectations. The specific national model of socio-political regulation represents a country-specific combination of universality, social security, social assistance, public and private provision of services, tax benefits and labour market policies. The application of one or another instrument depends on the burden of public expenditure, the demographic structure of the population, the poverty, the composition of the labour force, the level of economic development, the culture and the political will. Along with this, however, there is a tendency, characteristic of each specific national society, to adopt a certain model of socio-political regulation (Braykova 2000: 128). There are different models that limit the free market in different ways. In general, three models can be outlined – socio-democratic, liberal and conservative. (Esping–Andersen 1990) Researchers (Manning 2004; Mau and Verwiebe 2010) are of the opinion that Esping-Andersen's classification should be supplemented with another – a fourth model of socio-political regulation. This is the so-called post-socialist model. It was formed in the countries of Central and Eastern Europe and combines in a specific way elements of the conservative and liberal models, and also contains residual paternalistic elements, a legacy of the socialist past. All models implemented in the European countries are characterized by public services, compulsory insurance, comprehensiveness of social programs, financing from public funds, institutionalization of social relations, as well as ideas of compensatory justice and solidarity. As Mau and Verwiebe point out, regardless of the national characteristics and differences, "the welfare state in Europe takes a specific form" (Mau–Verwiebe 2010: 45).

Taking into account the similarities as well as the common challenges they face (related to globalization, the development of new technologies, population ageing, poverty and social exclusion, migration, etc.), European countries are synchronizing their political commitment in the social sphere. They reform their social systems following a common trajectory of change. This trajectory in previous decades was determined by neoliberal ideas and was associated with a reduction of state intervention to the minimum acceptable for community cohesion. In recent years, however, there has been a growing influence of the social investment perspective, which again addresses the idea of a strong welfare state, but seen as proactive

from a human life cycle perspective. The welfare state is an investment with a long-term but strong and profitable return (EC 2023: VIII).

Social investment: transformations and challenges for the welfare state

Social investment is the subject of research in areas related to social development, management of non-profit organizations, community development, social innovation, and employment. They are used in various discourses with a view to increasing the quality of human capital and filling existing deficits in social systems. They usually aim at ensuring a positive social impact, as well as a return on the initial investment. They apply to solving issues traditionally associated with the public sector with a social and/or environmental focus through funding from the public and/or private sector. Investors deliberately seek to achieve both financial and social returns by measuring the social impact achieved.

Social investment is implemented not only by the state, but also by different agents and institutions working at different levels (Midgley 2017). As Todorova (2021) notes, the philosophy of the role and place of social investment, in the context of the question of whose responsibility it is to provide welfare, focuses on the shared responsibility between the market, the family, the state and the community. The state is seen as responsive to community needs and wants. It has the responsibility to invest in human capital to support participation in the labour market or to adequately respond to social risks.

In view of the development of European welfare states, social investment came within the scope of research interest at the end of the 1990s. Its use was mainly connected with the activating policies of the labour market, and their consideration in relation to social protection was presented as an alternative or as a complementary element of social transfers to maintain incomes. Within the debate on the future of the welfare state, social investments are presented as allocations to social programs that produce returns and are aimed at future social welfare. They benefit individuals, households and communities as well as the society as a whole. (Midgley 2017). Furthermore, social investment is investments (inputs) in human capital, implemented through policies, the purpose of which is to increase people's skills and abilities for full participation in employment and social life (EP 2013). They create both social and economic returns. They also have the capacity to increase the size and productivity of the current and future workforce (Hemerijck–Ronchi–Plavgo 2023).

The development of social investment as a perspective reflects the changes in the structures of social risks as a result of the flexibility, uncertainty and destandardization of life processes. The changed risk typology is manifested in an increase in the size of social groups at risk, as well as in an increase in the probability that certain groups will be affected; social risks become more heterogeneous, less predictable and more difficult to ensure; they are more directly related to life events

and employment thus introducing a different type of social stratification (Leoni 2015, 2016).

A number of researchers (Hemerijck 2012, 2013; Pintelon et al. 2013; Leoni 2015, 2016) point out that the evolution of social risks, viewed through the prism of social stratification and the life cycle, confirms the importance of origin, gender, ethnicity for the transmission of disadvantage between generations, as well as inferring the importance of biographical life events as determinants of welfare. It also pays particular attention to life transitions (transition from education to employment, transition from care to employment) and risky life events (family breakup, health problems) that can lead to welfare losses. It has been recognized that the problems encountered during each phase of the life cycle may be either a consequence of earlier difficulties or a precursor to later problems. It has also been reported that the so-called “new” and “old” risks exist in parallel and are potentially complementary, connected through various interdependencies during the life cycle (Leoni 2015, 2016). This implies expanding the capacity of welfare states to implement interventions in the various stages of people’s lives. Social expenditure for them cannot be fully accepted as an expenditure factor. They have the potential to increase the economic efficiency and at the same time to promote equality and social inclusion, without forgetting that “no form of social expenditure is purely investment, without an element of current consumption” (Leoni 2015: 14).

The defining features of the social investment perspective are based on the understanding that the socio-political regulation should ensure long-term social and economic returns. As Leoni notes, “...instead of insuring and redistributing and thus largely ‘compensate’ and ‘repair’, social protection systems should pay more attention to ‘preparation’ and ‘prevention’” (Leoni 2015: 12). Achieving this requires a shift in the focus to social risk prevention. The main areas of policy intervention are the formation of human capital in all phases of life, the relationship between family and working life, work relations, with interventions grouped around the phases of the life cycle – childhood and youth, adulthood, old age. These interventions can represent investments that, in the medium and long term, generate returns by increasing welfare and avoiding dependency on social benefits. Functionally, the focus is on workforce productivity, increasing employment and employability. Priority is given to social services and practices that support access to favourable market positions, prioritising them on the basis of recognising the crucial role of early interventions and the interdependence of social risks throughout the life course.

In this respect, social investments generate returns with different time horizons and are designed to perform preventive functions regarding welfare. Their structure is built on mutually complementary functions: a) increasing and maintaining “stocks” of human capital and abilities throughout the life cycle (*human capital throughout life*); b) easing gender-based labour market “flows” and life-long transitions (*work-life balance flows*); and c) providing inclusive safety nets (*including*

buffers) (Hemerijck 2013, 2017; Hemerijck, Ronchi and Plavgo 2023). Combining them implies synergistic welfare returns. Modern welfare states should combine the performance of different functions in a balanced and mutually reinforcing way. The range of their interventions includes ex post income compensation as well as risk prevention and capacity building. Human capital and the labour market are at the heart of individual welfare. Skills acquisition and upgrading are recognised as important for securing employment opportunities and employment is the best prevention against social risks. As Leoni (2016: 197) notes, "...effective prevention is important to alleviate the pressures on the welfare state and ensure its long-term sustainability", but it must be implemented on the basis of effective minimum income guarantees. Furthermore, employment should be reconciled with the achievement of other life goals. This implies that, in addition to objective indicators such as employment and poverty, the assessment of returns should also cover outcomes such as increased activity and qualifications, employability, improved quality of life.

In an attempt to provide a theoretical rationale for the provision of social investment, a 'social investment multiplier' has been conceptualised to track the complementarity of policies across different stages of human life. This complementarity potentially fuels a cycle of welfare returns throughout people's lives, while promoting employment levels so as to ensure the macroeconomic sustainability of social protection systems as a whole (Hemerijck–Ronchi–Plavgo 2023). At the micro level, the multiplier reveals how social investment improves the material welfare (employment and income) of individuals and households and helps mitigate social risks in later life through incentives to improve skills and ease labour market transitions. At the macro level, the multiplier accounts for cumulative societal benefits in terms of improved productivity, higher employment, reduced gender gaps, later retirement, less poverty (EC 2023; Hemerijck–Ronchi–Plavgo 2023).

The complementarity of different policies (early childhood education and care, education, training, lifelong learning, active labour market policies, work-life balance policies and long-term care provision) in terms of the life-cycle multiplier implies that social services for capacity building and activation should be seen as a complement to, rather than a substitute for, cash transfers for income maintenance. From the perspective of social investment, the welfare state maintains its attitude towards redistribution and social protection, but also invests in measures to help people realise their potential, prevent risks and combat intergenerational inequalities. It is also noted that the question of the effects of the interplay between the different compensatory, enabling and regulatory policies that constitute regimes of social policy regulation remains insufficiently understood, given the assumption of 'tightly coupled' integrative policy repertoires (Hemerijck–Ronchi–Plavgo 2023).

In practice, under the conditions of financial austerity, the social investment perspective has mostly been applied, in forms that approximate its narrow understanding (Leoni 2015, 2016), namely as activation-focused investments with a

limited focus on human capital formation and a tendency to reduce social protection with a resulting overestimation of the activation potential and exclusion of social inclusion as a necessary and mutually reinforcing component.

Gradually, a lasting link between social investment and the significant deficits of modern societies has been observed, leading to the modernisation of social protection systems and, at the same time, to an economic model in which social and environmental models are the basis of competition and competitiveness.

The European Union has an important role in imposing social investment as a conceptual framework for understanding change and also as a normative idea to guide policies. There are indications to promote the implementation of more intensive social investments in health, education, employment, income and social protection, taking into account the national specificities of EU member states in terms of social vulnerability and institutional dynamics.

Conclusions

In the conditions of population ageing, increasing risk factors in people's lives and a growing need for social protection, a wide range of political interventions and investments at the different stages of people's lives are needed to increase the quantity and quality of employment. In this respect, the transformations of the welfare state are largely related to the labour market and are aimed at increasing employment and employability by increasing the employment of women, reconciling professional and family life and the active life of the elderly. They aim to increase the functional and financial sustainability of social systems.

Social investment is implemented through a set of policies and programmes aimed at reducing social and economic risk and vulnerability. They focus on human capital development and employment. These policies and programmes implement a wide range of interventions at all stages of people's lives, thus contributing to improving people's capabilities and opportunities to participate in modern labour markets, with a view to achieving high levels of employment, social inclusion, individual agency and life satisfaction.

The development of the social investment perspective is partly a reaction to neoliberalism, but it cannot be fully considered a socio-democratic project. Unravelling its intellectual underpinnings is important but beyond the scope of this article. The aim here is to emphasize the tendency of the European Union to use concepts that are relatively easily reflected in alternative visions of the welfare of society. Social investment can be used from the standpoint of different ideological orientations, which allows for different emphases on the one hand, and on the other hand – to merge different political traditions and conduct a dialogue between countries with different ideological orientations regarding welfare.

The European Union is building its political commitment based on the growing complexity of the multiple adverse consequences that affect the population; the

need for better coordination between economy and social policy through the lens of employment; mobilizing everyone to participate with a view to expanding the financial opportunities to cover the risks. It assumes a coordination role in relation to the changes in the national welfare states by setting the general transformational framework built through the prism of the life cycle and including a combination of social services, income maintenance schemes, regulations to maintain favourable positions on the labour market.

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Note

¹ Socio-political practice: a bureaucratic procedure for recognizing and guaranteeing the right of a certain social group to have means and/or life chances that are not a projection of its market position. Its implementation presupposes the creation of a special organization and determination of the way to mobilize the necessary funds (Braykova 2000: 111).



Photo/Iván Halász

Vlad Bujdei-Țebeică

Neoliberalism and the Red Pill: How Andrew Tate Used Populist Discourse to Spread Online Misogyny

Online misogyny surged post-2008 economic crisis, leading to the crystallisation and popularisation of the red pill ideology. Initially limited to online niche circles, Andrew Tate brought it into mainstream discourse by capitalising on male disillusionment and transforming his followers into agents contributing to his wealth accumulation. Tate's platform reveals a mix of misogyny, populism, and neoliberal individualism, unifying disconnected male groups. His discourse has social and economic aspects: the social paints men as disempowered victims and women as manipulative controllers, while the economic promotes commodifying women and achieving "financial freedom" through exploitation. This convergence of neoliberal "hustle culture" and Red Pill misogyny normalises human sex trafficking in the minds of susceptible men, an offence for which Andrew Tate is currently under investigation by the Romanian Directorate for Investigating Organised Crime and Terrorism. This topic highlights the role that civil society plays in shaping public discourse, attitudes and behaviors, both positively and negatively.

Keywords: Populism, manosphere, Red Pill, misogyny, anti-feminism, neoliberalism.

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Mădălina Constantin

#JeSuisCharlie Movement and Political Correctness in French Multicultural Society

The article explores the social and political responses of French society and Government to the aftermaths of the terrorist attack from 2015 against the Charlie Hebdo journalists. As political correctness shapes certain national policies in many countries with democratic tradition, this paper investigates upon the political and social causes that led to the national and international success of the #JeSuisCharlie movement. The questions investigated are: how can the integration of Islamic religious communities can take place in the French secular culture and not affect the freedom of speech? What political measures could be taken for the success of this integration? The attack against Charlie Hebdo was perceived by French society and politicians as an attack against the French nation, in particular an attack against people who represent the fundamental values of this group (the "freedom of speech"). The conclusion of the paper is that French society is highly polarized on political correctness, on how far freedom of expression can go and how dangerous this freedom can be in a secular culture that has failed to assimilate radical Islamism. At the same time, the reactions to this attack point to a specific feature of French culture, namely that "the tension between the "république comme Etat-nation" and the "république comme système de valeurs universelles"" underlies many of the social and political conflicts in contemporary France.

Keywords: Political Correctness, discrimination; minority, #JeSuisCharlie; liberalism, freedom of speech.

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Radu-Alexandru Cucută

Liminality and Fashionable Concepts. The Use of International Relations Theories and Concepts in Romania's Strategies

The paper argues that the employment of fashionable concepts, such as resilience and hybrid warfare, is increased in conditions of liminality. Romania's geographic liminality, political liminality and epistemic liminality favors the employment of fashionable concepts and theories. Successive cycles of intellectual fashion do not result however in the replacement of older concepts and theories by newer ones, but in a multi-layered intellectual architecture.

By analyzing the Romanian National Defense Strategy, the Romanian Military Strategy, the Defense White Paper, the paper attempts to trace out a map of the successive theoretical and conceptual influences exerted on Romanian strategic planning, to identify the meaning attached to these concepts and theories and the relation between them. The faults, inconsistencies and conceptual problems highlighted by the paper can be seen as the result of the vagueness inherent in fashionable concepts and theories, as well as of their use in a self-perceived liminal position, which leaves little room for an effective role of civil society in influencing public debates or actual public policies.
Keywords: Liminality, fashionable concepts, security, resilience, hybrid war.

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Paul Dobrescu—Flavia Durach

Clashing visions

The paper focuses, from a conceptual perspective, on current challenges for development, especially those related to managing uncertainty and crisis. Today's challenges are not bound to specific fields (e.g. geopolitics, energy, finance, climate change, public communication, the digital revolution). All these challenges merge, fueling a crisis of the whole, which can only be overcome through a new vision, through a grand strategic shift.

The issues presented in this paper are relevant for the representatives of civil society. Different organizations of the civil society are acutely aware of the pressing issues in their field of action. In this sense, they have a very particular, context-based vision for how progress (or development) should look like in their own area of expertise. However, there is need for a better awareness on how different priority areas are interconnected and influence each other. The present study provides insights for the civil society on the need for a unitary vision, one that takes into account all systemic imbalances that need to be addressed as a whole, for creating a healthier society.

The paper follows a qualitative approach to analyze the aforementioned issues, and to discuss relevant case studies. We use secondary data analysis of the most recent, analyses, reports and data available to identify main challenges and to inform on the implementation of a new strategic approach for development. Given the interconnected nature of current crises, finding solutions should follow a whole-of-society approach. As such, the authors make recommendations for the representatives of the civic society on how to contribute to the creation of a new vision for development, a vision that prioritizes the actual needs of society and addresses the macro-level implications of the aforementioned web of crises.

Keywords: Strategic development, overlapping crises, strategic uncertainty, vision.

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Eugen Gabor

The Contemporary European Social Democracy: Downfall and Resilience as Reflected by the Romanian (PSD) and Dutch (PvdA) Center-Left

After 2010, the European Socialist political family experienced a profound crisis that also had a notable impact on civil societies. Voices from the academic field argued that the response of the Social Democratic cabinets to the economic downturn of that period was the main reason behind the downfall. However, its roots run deeper in recent history. Some parties crossed this turmoil unscathed, and others rebounded quickly, proving their resilience. What are the main causes of this decline? Why were some parties able to move beyond it while others never recovered? The present paper tries to shape some answers to these questions by focusing on the evolution in the last 10 years of two members of the Party of European Socialists (PES): the Romanian Social Democratic Party (PSD) and the Dutch Labour Party (PvdA). Our conclusions emphasize the main factors that are relevant to our topic, highlighting that ideology still influences contemporary political fields and civil societies.

Keywords: Social Democracy, ideology, civil society, Romania, the Netherlands.

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Iulia Huiu

“As Long As It takes.” An Analysis of the Discourse and Policies of the Biden Administration during the First Year of War in Ukraine

Even before Russia's aggression against Ukraine, at least two concurrent challenges presented themselves in the international arena: an increased geopolitical great power competition and a set of new transnational shared threats, like climate change, pandemic, or terrorism. Whether the world finds itself now, more than a year into the war in Ukraine, at a “inflection point”, or “between orders”, there is a commonly shared belief both among international relations scholars and policy makers that today's events are going to prove decisive for the decades to come. Inside of this geopolitical struggle, United States has been reaffirming its stance in the world, and centered its new National Security Strategy, issued in October 2022, around the need for US leadership in the “strategic competition to shape the future of the international order.” With the war in Ukraine, the focus of US foreign policy has shifted during the last year to put an increased emphasis on Eastern Europe. Despite facing some criticism at home, both at the beginning of the war for not taking even more decisive actions, and lately from the far-right opposed to more funding, the US support for Ukraine has been consistently bipartisan in Congress and has benefited from large public approval. Overall, during the first year of war, US provided almost \$77 billion overall assistance including military, financial and humanitarian, and has vowed to support Ukraine “as long as it takes”. A part of the funding was dedicated to supporting civil society in Ukraine, on a number of initiatives related to war crimes accountability, amplifying messages of freedom, unity and democracy, humanitarian relief and preserving Ukrainian values. The aim of this paper is to use the qualitative tool of discourse analysis to identify the main themes of US foreign policy in regard to Ukraine, how they translated into actions during the first year of war and what this could mean for the future of US interests in the region.

Keywords: War in Ukraine, US foreign policy, discourse analysis, Eastern Europe, Biden administration.

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Vanya Kashukeeva-Nusheva

The electoral process in Bulgaria: current problems and necessary changes in the light of international standards for fair and democratic elections

The problems related to democracy of the electoral process and transparency of the election campaigns financing in Bulgaria occupy a central place in the public discussion from the beginning of the democratic changes in the 90s of the 20th century until today. During this period, the election process was monitored by a number of researchers, Bulgarian and international organizations, whose analyses highlighted the main deficiencies in the conduct of elections in the country. This article reflects the assessment of the compliance between international standards for fair and democratic elections and the state of the electoral process in Bulgaria. Examining the problem in this light, the article also examines the contribution of civil society to the consolidation of the electoral process in the country. The main emphasis is placed on inconsistencies and deficits in the elections thus the analysis can serve as a starting point for improvements in the electoral process in Bulgaria.

Keywords: Elections, Bulgaria, international standards, political parties, civil society.

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Daniela La Foresta—Vittorio Amato

Digital territories. Conflicts, actors and power in the relational space of the Metaverse

New relational models and innovative forms of participation, transaction and consumption have been modulated by technologies related to the development of the fourth industrial revolution. The new and most advanced frontier is represented by the Metaverse, a virtual space still not distinctively defined and largely unexplored in its multiple and potentially infinite functions, which prefigures a heterotopic, symmetrical and overlapping relationship between physical and virtual space (Foucault, 1967). The control of this place where trade, communication and social interaction take place is increasingly seen as an opportunity to exert power and assert economic and political influence, the benefits of which can also reverberate in the physical world.

Major state actors, therefore, are looking with increasing interest at the prospects and risks associated with the development of this platform, which, according to some analysts, may represent an important opportunity for a complete redefinition of geopolitical agendas. In this perspective, the recent strategic choices of some States aimed at supporting the development of the Metaverse has to be considered, such as the allocations to support research in certain critical sectors, the definition of support policies for cyberspace-related businesses (and work), the establishment of new and strategic alliances, or the reflection on the numerous critical issues that are increasingly clear and that have not yet found a shared response, such as those related to security, the sovereignty of States, the regulation of the ownership of digital spaces, and privacy. Just to name a few.

The ferment taking place outside the platform is accompanied by an increasingly lively activity within cyberspace: cities, States, diplomatic representations and government agencies, anticipating a near future, are in fact transferring functions, services and content to the platform. This is, for instance, the case of Seoul which, as of 2023, will allow avatars of its citizens to animate the digital reproduction of the city, or of the small island State of Tuvalu which, in response to rising sea levels and global warming, plans to create a digital counterpart that could be the first state present exclusively in cyberspace (WEF, 2022).

Nowadays, however, the Metaverse is predominantly populated by the platforms of the large multinational technology corporations that, in search of new opportunities, are creating digital worlds with profoundly different characteristics, purposes and technologies. The result is a dynamic, articulated and unregulated structure that, in most cases, is characterised by the self-determination of users and a more distributed geography of power.

The emergence of the Metaverse has direct implications on individuals and communities in both the virtual and physical realms, encompassing significant geopolitical consequences. Within this context, civil society assumes a crucial role in shaping the development and governance of the Metaverse, ensuring that it adheres to principles of transparency, inclusivity, and accountability. In turn, the Metaverse offers both opportunities and challenges to civil society, serving as a platform that provides new spaces for civic engagement, activism, and self-expression. It is

through a comprehensive understanding of the geopolitical dynamics within the Metaverse that civil society actors gain the ability to advocate for the protection of human rights, privacy, and democratic principles within this evolving digital landscape. By thoroughly examining the exercise of power and the intricate relationships between various actors and digital communities, this study offers invaluable insights that inform civil society strategies for active participation, policy advocacy, and the safeguarding of the interests of individuals and communities within the Metaverse. The emergence of the Metaverse has direct implications on individuals and communities in both the virtual and physical realms, encompassing significant geopolitical consequences. Within this context, civil society assumes a crucial role in shaping the development and governance of the Metaverse, ensuring that it adheres to principles of transparency, inclusivity, and accountability. In turn, the Metaverse offers both opportunities and challenges to civil society, serving as a platform that provides new spaces for civic engagement, activism, and self-expression. It is through a comprehensive understanding of the geopolitical dynamics within the Metaverse that civil society actors gain the ability to advocate for the protection of human rights, privacy, and democratic principles within this evolving digital landscape. By thoroughly examining the exercise of power and the intricate relationships between various actors and digital communities, this study offers invaluable insights that inform civil society strategies for active participation, policy advocacy, and the safeguarding of the interests of individuals and communities within the Metaverse. By this perspective, starting from the analysis of the still scarce References on the subject and integrating methodological tools proper to critical geopolitics and field research, the study aims to explore the geopolitical dynamics connected to the development of digital spaces. In particular, we intend to analyse the characteristics that make the Metaverse attractive for a “power project” and the consequent strategies defined by the most significant global actors; we also intend to describe the ways in which power is exercised within the new virtual world and to depict, also through the informative opportunities of network analysis, the relations existing between the different actors and digital communities.

Keywords: Metaverse, cyberspace, geopolitics, ICTs, digital divide, relational models, politics, power, privacy, Fourth Industrial Revolution, security, physical space, virtual space, technology.

Luís Lóia

Political ideologies and social imaginaries

Political ideologies are under debate since they were formed in social history, and to understand modern political life we must still pay attention to them. If political ideologies seems to be the major type of representation that people have to move themselves in political spectrum, I intend to demonstrate that we are witnessing their weakness to provide the needed meaning and to understand our political choices.

Dealing with this problematic view, could be helpful to recover the category of social imaginary to enlighten a more adequate comprehension of the phenomenon. Our thesis is that our social imaginary is becoming increasingly fragmented due to the lack of meaning that Political Ideologies once had but it is no longer recognizable in our daily political choices. On the other hand, the cosmopolitical appeal of globalisation does not yet provide a global social imaginary that could be recognizable beyond the scope of a post-ideology era, and, as so, presented itself as fragmented as the former. New social imaginaries are needed to overcome this fragmentation.

Keywords: Political ideologies, social imaginary, democracy, active citizenship.

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Gianluca Luise

Capacity training: training and capacity in the evolution of Public Administration in Italy

The National Recovery and Resilience Plan places at the core of public sector reform the enhancement and development of human capital, to be achieved by investing in training, upskilling and reskilling actions. For the first time in the history of PA in Italy, the innovative aspect is not only the volume of investment - which is unprecedented - but, above all, the implementation of the actions themselves with aim at structurally strengthening administrations.

The correlation between the topic of training and administrative capacity building offers a strategic perspective and a “meaningful framework” for developing the relevant actions, the identification of the players that can organize and provide training to civil servant and the engagement of administrations and public employees themselves.

More specifically, this perspective allows to include and project individual and organizational training needs within the broader capacity building strategic needs; than, it makes administrative capacity the tool to measure the impact of training and investment in human capital development in public administration.

Keywords: Political ideologies, social imaginary, democracy, active citizenship.

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Keywords: Strategic planning, gender mainstreaming, gender equality, Romania, intersectionality.

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Diana Elena Neaga

(Un)Committed to Gender Equality – An Overview of Strategic Governmental Planning in Romania

Even though under continuous attacks, gender equality is now a core value of the European Union. Different norms were used overtime by feminist civil society, gender experts and femocrats to promote it, some of them being directly enforceable (hard), others though also normative, adopted rather soft, as recommendations. As a consequence of this soft-to-hard dynamic, member states are moving with different speeds towards their aim of gender equality. Furthermore, a trend to a hard gender mainstreaming approach can be identified at the EU level and, in such a context, it will be interesting to find out how is Romania performing in integrating the gender equality perspective and addressing gender inequalities? So, in this paper I examine how Romania is advancing gender equality in its strategic governmental planning. I operationalise the strategic governmental planning for gender equality through two distinct approaches: firstly, gender mainstreaming, which involves integrating gender considerations across all levels of strategic planning; and secondly, the implementation of targeted measures. The employed methodology comprises a policy document analysis that primarily utilises gender equality marker outlined by the OECD–DAC. Additionally, the analysis will critically examine the underlying assumptions and explore the intersectional perspective of the strategies in question.

Keywords: Strategic planning, gender mainstreaming, gender equality, Romania, intersectionality.

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Valentin-Quintus Nicolescu

Intellectual Origins of Putinism as Russia's State Ideology

After more than a year since the Russian invasion of Ukraine, the issue of Russia's state ideology is still lacking a coherent approach by Western scholarship, which rather tend to perceive it more like a "simulacra of ideology", as Bryan D. Taylor (2018) put it, and not as a properly formed, cohesive body of ideas. In my opinion this is a strategic mistake, which actually fails to account for current Russian political standpoints and developments, both internally, and on the world stage, and thus providing analysts with a limited framework for understanding and predicting future directions of Russian politics.

In my paper I plan to show that the Russian state ideology – Putinism – originates in a mix of intellectual traditions that all gravitated around the issue of Russian identity and nation building. Thus, I am planning to answer the following questions: what are the core dimensions of the contemporary Russian state ideology? What were, during the Putin years, the main developments/evolutions within this hegemonic discourse?

Therefore, in my paper I will explore various thinkers and texts in order to refine a clearer image regarding the intellectual origins of Russia's state ideology and the way in which is shaping current Russian public narrative. By doing this I hope to be able to provide a better understanding of the inner ideological infrastructure on which policy and institutional decisions are built, particularly those regarding the adoption of anti-democratic laws designed to shape the Russian state-building project and its regime – the so-called sovereign democracy, the rule-by-law, the vertical of power and so forth –, and their impact on civil society development.

Keywords: Putinism, Russian nationalism, Russian state ideology, Russkii Mir.

Valentin-Quintus Nicolescu was born in 1977 in Bucharest, Romania and holds a PhD in political science, and currently is an associate lecturer at the National University of Political Studies and Public Administration in Bucharest. His main research interests are nation and nationalism theory, postcolonial theory and critical theory.

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Brîndușa Palade

Coming to Terms with the Colonial Legacy? Imperial Mores and Enduring Classism in the United Kingdom

The United Kingdom is currently a leading democracy with an old tradition of civic freedoms and rule of law. The British society is known to be diverse, multicultural and multiethnic. However, the UK also preserves imperial symbols and some old mores that are problematic especially with regard to past colonial injustices and crimes. The backbone of the British colonial domination was the aristocracy, a social class that was never thoroughly reformed and keeps enjoying wealth, prestige and privileges. This paper will illustrate this kind of domination through the case of the British colonial rule in Kenya. It will ask whether aristocratic paternalism and classism are still present in British society. Furthermore, it will try to see to what extent that may help explain political phenomena such as the support for Brexit on conservative ideological grounds, the difficulty of listening to former EU partners or the reluctance to apologize and seek reconciliation for the past colonial violence. This analysis could provide some further arguments to the republican side of British civil society, such as the pressure group Republic, whose members, including their leader, have been arrested in London during an anti-monarchy protest on the day of the coronation of King Charles III.

Keywords: Historical amnesia, empire, paternalism, violence, aristocracy, classism.

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Mykola Polovyi

Threats of Wartime Restrictions to Post-War Democracy in Ukraine

The aim of the text is to assess the amount and essence of measures, connected with wartime restrictions of political process and communications, adopted in Ukraine during the Russian-Ukrainian war from February 2014 to January 2023. The period of study is divided into three stages – 1) from the beginning of the war till Covid-19; 2) the period of “semi-peaceful” Covid-19 restrictions (2020 – the beginning of 2022); 3) from 24 February 2022 till January 2023.

The main attention is given to restrictions of political activity including freedom of speech, the press, religion, association, public gatherings, protests in social media, possibilities, and confines for anti-Ukrainian propaganda. Most of those restrictions are constraints of civil society.

Ukrainian data shows that neither the beginning of the war in 2014 nor the of the Covid-19 lockdowns couldn't bring the country to significant restrictions on democratic and civil society freedoms. All the time state authorities slowly go further to authoritarian-minded consolidation in front of the perceived danger of the political crisis. At the same time, due to “off-line restrictions” during the Covid-19 period, the trend of increase in the number of controversial decisions of authorities despite people's protests.

From 24 February 2022 Ukraine implemented martial law which entails a lot of restrictions on political and civil activity. But at the same time, Ukrainian authorities made additional confines for pro-Russian minded forces. It looks relevant to the circumstances and is welcomed by Ukrainian society, but it should bring huge threats to the post-war democracy in Ukraine.

Keywords: Wartime political restrictions, post-war regime, Ukraine, militant democracy, authoritarian threats.

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Adrian Popovici

Apocalyptic Narratives as an Integral Part of Political Imagination – An Analysis of Ancient Biblical Myths and their Evolution

The idea of the apocalypse, both by referring to the biblical myth of the Apocalypse in its various forms, but also by referring to the idea of the end of the world, is a fundamental part of this paper and of my doctoral thesis. In this paper I will analyze how the idea of the apocalypse has emerged throughout history, how it has been transformed according to the social, economic and political developments of the different communities responding to their political and spiritual needs.

This work is built on the idea that the end-of-the-world narratives that arose in antiquity were the answer that certain communities or groups within them tried to understand the world in which they lived and what its purpose might be. I intend to look at the forms of apocalyptic thinking and how it responds to social and political concerns.

Despite its ancient origins, apocalypticism can also be used to understand not only the human communities that have existed over the last thousands of years, but also today's human societies, how individuals in them and the groups they form act or position themselves in relation to different themes and situations. Compared to the idea of civil society, apocalypticism can be used to identify „the fears” of one related to one's own end, but also those values around which such groups are built.

Keywords: Revelation, Apocalypse, Political Imaginary, Political Narratives.

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Ștefăniță Puiu

Migration between Latin America and the United States of America in 2015–2018

The discussion about immigration towards the United States of America was a vast and complex topic which has been extended for the past 200 years and has affected profoundly the civil society because of the impact that the phenomenon presumes. The view over this concept has been changed and updated through the pass of time until it has reached two very different ideals which have been expressed between 2015 and 2018.

This subject is extremely relevant because it comprises millions of lives that could have suffered a significant change due to the constantly shifting policies. Until the end of the Obama administration the world has observed a slight decrease in the severity of the bills regarding immigration.

Throughout this article I have analysed the socio-political changes that have been generated by the creation or modification of the immigration and immigration – related bills in the short, yet significant period of time. The comparison that resulted was based on the legislative input, as well as the social lessons that have been acquired about the catastrophe generated by the radical change of the migration policies and their effect upon the civil society.

This article shows that the changes brought to the immigration policies have had a negative impact upon the development of the society, as they have divided it. At the same time, the possibility of migration towards the United States of America in a legal manner has become even more difficult, almost obliging people to follow the illegal path due to the harsh conditions that they have in their own countries and the strong desire to achieve the “American Dream”.

Keywords: Migration, society, policy-making, illegal migration, United States of America, Mexico.

Ștefăniță Puiu was born in Cape Town, South Africa in 1999. He has completed his pre-university studies in two Latin American countries, fact that has made him focus his university studies towards this particular area. For his bachelor's degree he attended the International Relations and European Studies programme at the Faculty of History at the University of Bucharest, concluding his studies with a paper regarding the “Internal and international evolution of Cuba in the XXth Century”. He continued his studies with regards to the geographical area by pursuing a master's degree in Latin American Studies at the National University of Political Studies and Public Administration, which he concluded with a paper on “The influence of Latin North and Central American countries on the Immigration Reform and Control Act and their migration flows with the United States of America”. In present times, Ștefăniță Puiu is a PhD candidate for the National University of Political Studies and Public Administration where he is researching the renegotiation of center-periphery relations after the Cold War, having a case study of the comparative regional dynamics in Latin America and the Western Balkans.

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Radu Sebastian Ungureanu

Wars, States, and Liberal Values: Reshaping the International Order in a Global World

For three decades after the end of the Cold War, non-traditional threats and their management dominated the perception and understanding of international security. Intra-state conflicts and humanitarian interventions, the war on terror, the financial crisis, migration or the pandemic sketched the main lines of a political and intellectual landscape prone to notice a continuous erosion of the traditional foci on nation-states and their military preoccupations due to the processes of globalization. Facing these challenges, the major powers, connected by a certain consensus on fundamental issues, commonly coped with the ubiquitous crises. The outbreak of the Russo–Ukrainian war dramatically marked the slow, even unnoticed, change of this perspective. As the ‘classical’ optics regains its privileged position as the main approach to international security, this conflict also indicates a revision of the international order, too.

The aim of this paper is to question the noticeable current changes of the international order, based on three main arguments. Firstly, a certain de-legitimization of the great powers’ military interventions accompanies the reassertion of the statist understanding of international security. Secondly, the liberal values are still the very basis of the international order, as they were in the last thirty years. In this realm, the cosmopolitan approach, of Kantian inspiration, which envisions a transnational civil society, was slightly replaced by a Wilsonian conception, focused on national and international actors, institutions and processes. Finally, the global issues do not disappear, but become the premises of the present reshaping of the international order.

Keywords: International order, globalization, liberal values, great power politics, Russo–Ukrainian war.

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Anca Vasilache

The „Free and Open Indo-Pacific” strategic concept: a transcending American foreign policy dimension during Donald Trump administration (2017–2021)

The National Security Strategy (NSS) of the United States from December 2017 provided the requirement of integrated regional strategies meant to face China and Russia’s aspirations to project power outside their borders and mostly over their neighbouring states. The 2017 NSS formally mentions the national interest of the United States in a free and open Indo-Pacific area, but a coherent strategy regarding the concept was enunciated by the Indo-Pacific Strategy Report of the Department of Defense in June 2019. Although, initially, a number of experts considered that President Trump was turning to isolationism in the American foreign policy, a qualitative research focused on official documents, speeches and statements analysis from the period of Donald Trump’s mandate reveals that the „Free and Open Indo-Pacific” (FOIP) strategy formulated during his term, proved to be a continuation of the „Rebalance to Asia” policy of the Barack Obama administration, with an emphasis on prioritizing the American interest regarding the Indo-Pacific region, in the context of China’s regional rise and the expansion of its influence in the area. Despite criticism for its lack of clarity resulting into a difficulty to implement the strategy and for attempting to extend American hegemony in the region in order to contain the rise of China, this paper aims to prove that the Free and Open Indo-Pacific strategy succeeded into strengthening alliances of the United States with Indo-Pacific states, as it managed to introduce or to revitalise multilateral formats of security cooperation going beyond the traditional hub-and-spokes system. The FOIP strategic concept in the Trump era experienced a turning point that proved its relevance in the evolution of subsequent Sino-American relations and was inspired by the Rebalance to Asia policy of President Barack Obama. The approach is all the more important as the 2017–2021 FOIP strategy has subsequently influenced the „Indo-Pacific Strategy”, a priority policy of Biden Administration, focused on maintaining a regional order based on existing international law and norms with the objective to preserve a free and open Indo-Pacific region, with a strong focus on supporting democracy as a key concept for upholding the rule of law, strengthening civil society and respecting the human rights.

Keywords: FOIP, international law, regional order, regional strategy.

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Milena Hristova Yorgova

The welfare state through the lens of the social investment perspective: transformations and challenges

The paper examines the transformations in modern welfare states and the use of social investment as an approach to limit and overcome the major challenges to the European social model. The conceptual development of the approach to the needs of the EU political engagement in the social sphere is built on the basis of the links between economy, employment and social policy. The research interest in the issue has been provoked by the activity of the EU to restart its social dimension in an attempt to give a new impetus to the idea of a social and inclusive Europe for its citizens.

Keywords: Social state, social policies, social investments.

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