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SERBIAN POLITICAL THOUGHT

POLITICAL INSTITUTIONS, ELECTIONS,
AND IDENTITY DYNAMICS

Zhidas Daskalovski, Aleksandar Ljubomirović, Dušan Čorbić

SECURITY CHALLENGES AND GLOBAL RISKS

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REVIEWS

Dragana Mitrović



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SERBIAN POLITICAL THOUGHT

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THIS ISSUE'S THEME

**POLITICAL INSTITUTIONS, ELECTIONS,
AND IDENTITY DYNAMICS**

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TERRITORIAL REPRESENTATIONAL ASYMMETRY IN A MULTI-DISTRICT PROPORTIONAL REPRESENTATION SYSTEM: MARGINAL SEAT THRESHOLDS IN MACEDONIA, 2002–2024

Abstract

Macedonia elects 120 members of parliament from six domestic electoral districts of equal magnitude, each returning twenty seats through closed-list D'Hondt allocation. Equal district magnitude and a common allocation rule do not, however, imply an identical marginal threshold for the final seat. Using official district-level results for eight parliamentary elections from 2002 to 2024, this article calculates the twentieth (lowest winning) D'Hondt quotient for each of 48 district-election observations. The measure is interpreted narrowly as a district-level marginal winning threshold, not as a general individual-level measure of vote value or as classical malapportionment. The results show persistent territorial asymmetry: ED4, ED3, and ED1 generally display higher marginal thresholds, while ED6 lies below the cross-district mean in every election and records the lowest value in six of the eight contests. A seat-weighted calculation shows that Macedonian- and Macedonian-led mandates were won in district environments with an average marginal threshold of 7,629 votes, compared with 6,720 for Albanian- and Albanian-led mandates, a difference of 909 votes (13.5

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percent). This pattern does not arise from reserved seats, ethnic allocation rules, or a lower legal threshold; the domestic system has no general national legal threshold. Rather, it reflects the territorial distribution of votes, valid-vote volume, and party competition. Registered-voter data point the same way: the two districts with the highest mean marginal thresholds, ED4 and ED3, have the smallest 2024 electorates, so the asymmetry documented here runs counter to, rather than with, classical apportionment inequality. The article thus identifies a form of territorial representational asymmetry that is conceptually distinct from classical malapportionment and offers a replicable diagnostic for multi-district proportional representation systems.

Keywords: Macedonia, electoral districts, D'Hondt, marginal winning quotient, effective threshold, district magnitude, territorial representational asymmetry, minority representation, proportional representation

INTRODUCTION

Macedonia elects 120 members of parliament from six domestic electoral districts.¹ Each district returns 20 members of parliament (MPs) through closed-list proportional representation using the D'Hondt formula. The institutional design is formally symmetrical with respect to district magnitude and the allocation rule: every domestic district elects twenty MPs under the same divisor formula. The Electoral Code does not impose a general national legal threshold for representation in these domestic districts. The central question is therefore narrower: does formal symmetry in magnitude and formula also produce similar district-level marginal thresholds in practice?

The empirical puzzle is immediately apparent. If all six districts share the same magnitude, should the marginal threshold for the final seat not converge across them? The answer is no, and the divergence is systematic. The twentieth, lowest winning D'Hondt quotient varies persistently across districts and over time. Some districts repeatedly record a higher cut-off for the final allocated quotient, while others

¹ The Republic of Macedonia changed its constitutional name to North Macedonia in 2019. The short form Macedonia is used throughout this article.

record a lower one. This variation matters because parties and voters compete in territorially distinct electoral sub-arenas with different valid-vote totals and different structures of inter-party competition.

The article therefore asks: what was the marginal winning quotient for the twentieth and final mandate in each electoral district across the parliamentary elections of 2002, 2006, 2008, 2011, 2014, 2016, 2020, and 2024? And what does variation in that district-level threshold imply for the electoral environments in which Macedonian-led and ethnic Albanian-led party families win seats? The core argument is that the observed difference is not a formal ethnic privilege embedded in the electoral code. No reserved domestic seats are allocated on ethnic lines, no ethnic allocation formula is applied, and ethnic Albanian-led lists face no separate or lower legal threshold. The difference is territorial: ethnic Albanian-led mandates are won overwhelmingly in lower-threshold districts, above all ED6, while Macedonian-led mandates are more heavily concentrated in higher-threshold environments, including ED3 and ED4.

The contribution of the article is both empirical and theoretical. Empirically, it compiles a systematic district-election series of twentieth D'Hondt quotients for all six districts across eight elections, providing an election-specific measure of the marginal cut-off for the last seat. Theoretically, the article shows that formally identical district magnitude and allocation rules can coexist with persistent territorial differences in marginal representational access when valid-vote volumes and the distribution of votes among lists differ across districts. This phenomenon is conceptually distinct from classical malapportionment, which concerns the allocation of seats relative to district population or electorate size. The article, therefore, uses the broader term territorial representational asymmetry for the observed pattern. This distinction contributes to the literature on electoral inequality and minority representation in post-communist and multi-ethnic states (Bieber 2004; Friedman 2005) and offers a diagnostic that can be applied to other multi-district proportional systems.

THEORETICAL FRAMEWORK AND LITERATURE

The analysis builds on four bodies of electoral-system scholarship: district magnitude, effective thresholds, malapportionment, and minority representation. District magnitude occupies a central

position in comparative electoral studies because it shapes the relationship between votes and seats and thereby affects proportionality, fragmentation, and accountability (Lijphart 1994). Carey and Hix (2011) identify a low- to medium-magnitude institutional “sweet spot” that can balance proportionality and governability. With twenty seats per district, Macedonia uses relatively large multi-member districts, yet D’Hondt allocation can still create meaningful barriers for smaller or geographically dispersed lists. Regional scholarship likewise illustrates how the interaction of proportional representation, D’Hondt allocation, legal thresholds, and coalition strategies can shape parliamentary fragmentation and representational access (Daskalovski 2019; Orlović 2015). Work on the Macedonian case has in turn assessed the overall proportionality of the six-district model against European comparators (Fidanovski and Rechica 2023).

The second theoretical foundation is the literature on effective thresholds. Taagepera and Shugart (1989) and Taagepera (1998) distinguish a formal legal threshold from the practical threshold generated by district magnitude and seat-allocation mechanics. A widely used approximation is $75/(M+1)$, where M denotes district magnitude. With $M = 20$, this gives approximately 3.6 percent of the district vote. The present article does not treat that formula as an observed cut-off. Instead, it measures the actual twentieth, lowest winning D’Hondt quotient in each district-election observation. Expressed in votes, this is an ex post marginal winning quotient: the cut-off at which the final of twenty district mandates is allocated in a particular election.

Table 1. The formula-based effective threshold and the district-level marginal measure used in this article

Item	Value
District magnitude (M)	20 seats per district
Formula-based effective threshold	$75 / (M + 1)$
Expected threshold when $M = 20$	approximately 3.6%
Empirical measure in this article	20th (lowest winning) D’Hondt quotient, expressed in votes

Source: Author’s elaboration based on Taagepera and Shugart (1989) and Taagepera (1998).

Third, the article engages the literature on malapportionment and voter equality. Classical malapportionment concerns a mismatch between the share of seats allocated to a district and its share of the relevant population or electorate; one consequence can be cross-district variation in the raw-vote cost of seats (Riera and Lago 2023). Kedar, Harsgor, and Sheinerman (2016) show more broadly that proportional representation does not by itself guarantee identical representational influence across voters. The measure used here is nevertheless conceptually distinct from classical malapportionment: it does not compare population or registered voters per seat. It captures the realized district-level cut-off after turnout and the distribution of valid votes among lists is observed. The analysis therefore speaks directly to territorial asymmetry in marginal representational access, while treating classical malapportionment as a related but separate phenomenon.

For district d in election year t , the article defines the marginal seat threshold as the twentieth-highest D'Hondt quotient among all party quotients generated in that district. If list p receives V_{pdt} votes and the divisor is k , the quotient is V_{pdt}/k . The twenty highest quotients across all lists receive the twenty available seats; the twentieth quotient is therefore the lowest winning quotient and the cut-off for the final mandate. Lower values indicate a lower marginal threshold for the last seat and higher values a higher one. Crucially, the twentieth quotient is not interpreted as the intrinsic value of every vote cast in the district, nor as the average number of votes required for every seat. It is an election-specific marginal indicator shaped jointly by valid-vote volume and the distribution of votes among competing lists.

Finally, the article connects this measurement framework to scholarship on minority representation and territorially organized party systems. Proportional representation can facilitate minority inclusion, but the extent of that effect depends in part on how voters and parties are geographically distributed. A territorially concentrated community can translate votes efficiently in particular districts, while geographically dispersed support may confront less favorable district-level thresholds. In Macedonia, ethnic Albanian-led parties win most of their seats in ED6 and substantial numbers in ED1, ED2, and ED5. The institutional consequence identified here is territorial rather than formally ethnic: when seats are concentrated in districts with lower marginal thresholds, the bloc's seat-weighted exposure to those thresholds is lower even

though the legal allocation rule is identical for all lists. Comparative guidance on electoral-system design treats district structure and thresholds as choices with direct consequences for the inclusion of minority communities, which is precisely the dimension on which the present measure is informative (International Institute for Democracy and Electoral Assistance [International IDEA] 2005; Venice Commission 2008).

Table 2. Literature informing the theoretical contribution

Literature strand	Relevance for this article
Taagepera and Shugart (1989); Taagepera (1998)	Distinguishes formula-based from actual effective thresholds.
Carey and Hix (2011)	Establishes why magnitude governs proportionality, fragmentation, and accountability.
Kedar, Harsgor, and Sheiner-man (2016)	Framework for analysing voter equality under PR, not only in majoritarian systems.
Daskalovski (2019); Orlovic (2015)	Regional evidence on how proportional rules, D'Hondt allocation, and party strategies shape fragmentation and access.
Fidanovski and Rechica (2023)	Assesses the proportionality of the Macedonian electoral model.
International IDEA; Venice Commission	Connects electoral design to inclusion, thresholds, and minority representation.
Riera and Lago (2023)	Defines classical malapportionment in population/seat terms, clarifying its distinction from the marginal quotient used here.

Source: Author’s synthesis of the cited literature.

DATA, MEASUREMENT, AND METHOD

The empirical material consists of official district-level parliamentary election results published by the State Election Commission, from which the author constructed an analytical database covering the elections of 2002, 2006, 2008, 2011, 2014, 2016, 2020, and 2024 (State Election Commission of the Republic of North Macedonia n.d.). These eight contests constitute the full series examined under the domestic six-district model in which each district returns twenty

MPs by D'Hondt allocation. The analytical frame comprises the 120 seats allocated in the six domestic districts; the three diaspora mandates elected in 2011 and 2014 fall outside these districts and are therefore excluded from the district analysis and domestic-seat comparisons. Electoral-district boundaries were amended during the period under study, including changes to two districts adopted in 2011 (OSCE Office for Democratic Institutions and Human Rights [OSCE/ODIHR] 2011); the longitudinal analysis therefore follows the legally defined ED1–ED6 units applicable at each election rather than assuming perfectly invariant geographic boundaries. For 2024, the national totals used in the counterfactual simulations were updated to the final results after the repeated voting in parts of ED5 and ED6 and cross-checked against the ODIHR final results annex (State Election Commission of the Republic of North Macedonia 2024; OSCE/ODIHR 2024). The district-level twentieth-quotient series used in the core analysis is reported in Table 4.

Coalitions are treated as the electoral lists under which votes were cast, consistent with the official allocation procedure. For the bloc-level descriptive analysis, winning lists are classified as Macedonian- or Macedonian-led, ethnic Albanian- or ethnic Albanian-led, or other/minority. This classification is used only to compare the district threshold environments in which seats are won; it does not assign ethnicity to individual voters and should not be read as a claim about the identities of all supporters of a given list.

The main dependent variable is the district-level marginal seat threshold: the twentieth-highest D'Hondt quotient in each district-election observation. It should be distinguished from average valid votes per seat, which equals total valid votes divided by twenty, and from classical voters-per-seat measures of malapportionment. Average valid votes per seat captures overall electoral volume; the twentieth quotient captures the realized cut-off for the last allocated mandate after votes have been distributed across lists through the D'Hondt divisor sequence.

To examine the correlates of district-level threshold variation, the article also uses two descriptive indicators. The first is the number of valid votes per district, an electoral measure of realized vote volume. The second is the effective number of electoral parties by votes (ENP), calculated in the standard way as the reciprocal of the sum of squared vote shares (Laakso and Taagepera 1979). ENP captures district-level fragmentation. Finally, the seat-weighted threshold for each bloc is

computed by weighting each district-election marginal threshold by the number of seats won by that bloc in the corresponding district. This statistic describes the average threshold environment in which a bloc’s seats were won; it is not an estimate of the votes actually “spent” on each of those seats.

District size, realized vote volume, and the marginal threshold are reported together in Table 3. The register figures are State Election Commission data reproduced in Constitutional Court of the Republic of North Macedonia (2025); comparable figures on district boundaries are not published for the earlier contests. For a descriptive overview of the 2024 election and district structure, see Treneska *et al.* (2024).

Table 3. Registered voters, vote volume, and marginal thresholds by electoral district

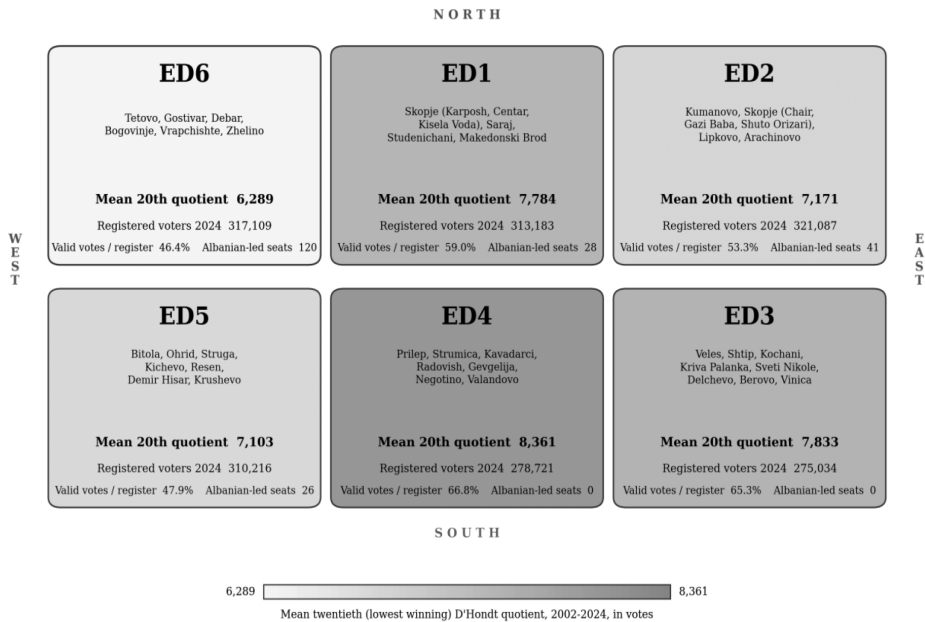
Electo- ral district	Registered voters (2024)	Share of national register (%)	Mean valid votes, 2002– 2024	Mean valid votes as a share of the 2024 register (%)	Mean 20th quotient (votes)
ED1	313,183	17.25	184,783	59.0	7,784
ED2	321,087	17.69	171,068	53.3	7,171
ED3	275,034	15.15	179,542	65.3	7,833
ED4	278,721	15.35	186,308	66.8	8,361
ED5	310,216	17.09	148,607	47.9	7,103
ED6	317,109	17.47	147,156	46.4	6,289

Source: Registered voters from State Election Commission data reproduced in Constitutional Court of the Republic of North Macedonia (2025), U.br.186/2024; valid votes and marginal thresholds are the author’s calculations from official district-level State Election Commission results, 2002–2024.

Note: Each district returns twenty seats, so the share of the national register in column three may be compared directly with a uniform seat share of 16.67 percent. Registered voters are reported for 2024 only; the valid-vote and threshold columns are means over the eight elections from 2002 to 2024, so column five is an indicative participation ratio rather than a turnout rate for a single contest. Comparable official ethnic-composition figures are not reported on electoral-district boundaries, because census data are organized by administrative units; no district-level ethnic estimates are therefore inferred here.

Two features of Table 3 bear directly on the argument. First, apportionment inequality across the six districts is modest. The registers range from 275,034 in ED3 to 321,087 in ED2, a ratio of 1.17, and the Loosemore–Hanby malapportionment index is 2.8 percent. Second, and more consequentially, what inequality there is runs in the opposite direction to the threshold ranking. ED3 and ED4 hold the two smallest registers yet record the two highest mean marginal thresholds, while ED5 and ED6 hold large registers and record low ones; across the six districts, the correlation between register size and the mean twentieth quotient is -0.73 . The cross-sectional 2024 register comparison is consistent with the interpretation that realized vote volume and participation, rather than seat apportionment, are important proximate correlates of the observed threshold differences. Mean valid votes over the eight elections amount to roughly two-thirds of the 2024 register in ED3 and ED4, but to less than half in ED5 and ED6. Because the numerator is a period mean and the denominator is the 2024 register, these ratios are indicative rather than election-specific turnout rates. The comparison nonetheless reinforces the distinction between the marginal-threshold phenomenon measured here and classical malapportionment; a registered-voter series for the earlier contests would permit a panel estimate rather than a cross-section. Figure 1 presents the same information schematically, together with the principal municipalities of each district, so that the territorial structure underlying the argument can be read at a glance, and Figure 2 shows the corresponding administrative geography.

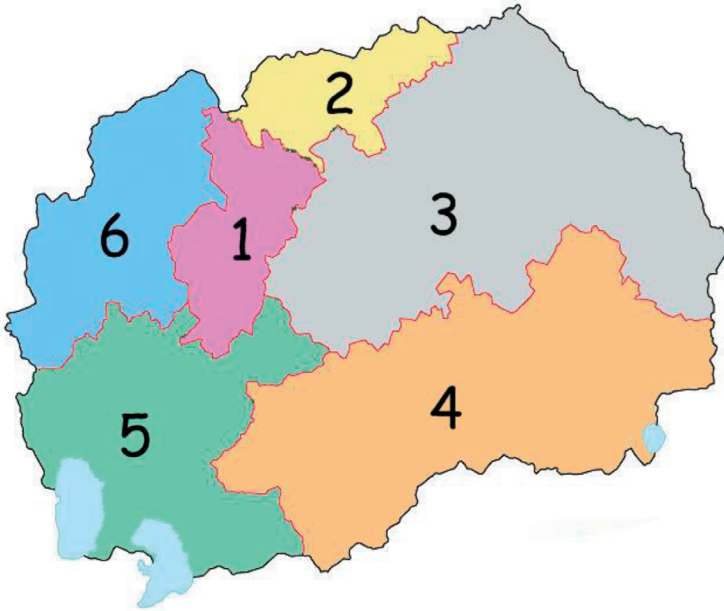
Figure 1. Schematic overview of the six domestic electoral districts



Source: Author’s compilation. District composition from the Law on Electoral Districts (2002); registered voters from State Election Commission data reproduced in Constitutional Court of the Republic of North Macedonia (2025); thresholds and vote volumes are the author’s calculations from official district-level State Election Commission results.

Note: The figure is schematic. It shows the approximate relative position of the six districts and their principal municipalities, not their administrative boundaries; municipal composition was adjusted after the 2004 territorial reorganisation. Shading is proportional to the mean twentieth D’Hondt quotient over the period, from the lowest in ED6 to the highest in ED4. Electoral-district boundaries were not perfectly invariant over the full period; the schematic is intended for orientation and does not imply a fixed 2002–2024 geometry.

Figure 2. The six domestic electoral districts of Macedonia



Source: Author.

Note: Numbers 1 to 6 denote electoral districts ED1 to ED6. The map is reproduced for geographic orientation only. District boundaries were amended during the period under study, so the figure should not be read as a fixed 2002–2024 geometry.

**SYSTEMATIC COMPARISON
OF ALL SIX ELECTORAL DISTRICTS**

Table 4 presents the central empirical measure for all districts and all eight elections. The hierarchy is persistent. ED4 most often records the highest marginal threshold, followed by ED3 and ED1, whereas ED6 lies below the cross-district mean in every election and records the lowest value in six of the eight contests; ED2 was marginally lower than ED6 in 2002 and in 2006. The finding therefore emerges from a full six-district comparison across the entire 2002–2024 series rather than from a selective ED6-versus-ED3 contrast.

Table 4. Twentieth (lowest winning) D’Hondt quotient by electoral district, 2002–2024

Year	ED1	ED2	ED3	ED4	ED5	ED6
2002	7,666	7,467	8,377	8,980	7,881	7,817
2006	6,274	5,444	6,723	7,241	6,235	5,672
2008	7,768	6,939	8,011	8,205	7,033	6,193
2011	8,234	7,383	8,536	9,356	7,496	6,274
2014	8,299	7,447	8,155	8,750	7,178	6,478
2016	9,105	8,190	9,023	9,478	7,355	6,548
2020	6,827	6,842	6,939	7,448	6,895	5,353
2024	8,096	7,656	6,896	7,427	6,753	5,980

Source: Author’s calculations from official district-level results of the State Election Commission (SEC), 2002–2024. Values rounded to the nearest whole vote.

The pattern indicates persistence rather than a purely random ordering. ED4, ED3, and ED1 are generally above or near the overall mean marginal threshold in each election, while ED6 is consistently below it. The hierarchy is not immutable: thresholds move with election-specific vote volume and the structure of competition. In 2024, for

instance, ED3 falls below its usual position while ED1 and ED2 remain elevated. Nevertheless, the lower-threshold position of ED6 and the higher-threshold position of ED4 and ED3 recur across most election cycles.

Table 5. Summary statistics by electoral district, 2002–2024

District	Mean	Median	Min	Max	SD	CV%	Mean valid votes	Mean ENP
ED1	7,784	7,932	6,274	9,105	888	11.41	184,783	3.79
ED2	7,171	7,415	5,444	8,190	813	11.34	171,068	4.08
ED3	7,833	8,083	6,723	9,023	866	11.06	179,542	2.50
ED4	8,361	8,478	7,241	9,478	907	10.85	186,308	2.34
ED5	7,103	7,106	6,235	7,881	500	7.04	148,607	3.42
ED6	6,289	6,234	5,353	7,817	737	11.71	147,156	4.00

Source: Author’s calculations from the analytical database compiled from official district-level State Election Commission results, 2002–2024.

Note: Threshold values are the 20th D’Hondt quotient in votes. Mean valid votes and mean ENP are computed over the eight elections in the dataset. Summary statistics for the threshold columns are computed from the rounded integer series reported in Table 4; means are rounded half up, so the ED3 mean of exactly 7,832.5 is reported as 7,833. CV% = coefficient of variation.

The average gap is substantively large. ED4’s mean marginal threshold is 8,361 votes, compared with 6,289 in ED6, a ratio of 1.33. Thus, the cut-off for the final seat was, on average, approximately one-third higher in ED4 than in ED6. This is the article’s core descriptive evidence of territorial representational asymmetry in marginal seat thresholds.

MECHANISMS: VOTE VOLUME
AND PARTY-SYSTEM FRAGMENTATION

The first proximate correlate of the district threshold is vote volume. Because each district returns exactly twenty MPs, districts with more valid votes tend to generate higher winning quotients, other things equal. Across the 48 district-election observations, the Pearson correlation between total valid votes and the marginal seat threshold is 0.74, a positive and moderately strong association. The result is consistent with the structural expectation that equal district magnitude combined with unequal realized vote volumes can produce different marginal cut-offs.

The second correlate is district-level party competition. Fragmentation affects the distribution of quotients across lists and, therefore, where the cut-off falls. In the present dataset, the correlation between ENP and the marginal seat threshold is negative (−0.57): more fragmented competition is associated with a lower twentieth quotient, while more concentrated competition tends to coincide with a higher cut-off. These are descriptive associations, not causal estimates. Fragmentation and vote volume may themselves be related to demographic, geographic, and political conditions that are not modeled here.

Table 6. Descriptive correlations with the marginal seat threshold
(N = 48 district-election observations)

Relationship	Correla- tion (r)	Interpretation
Valid votes → marginal seat threshold	0.74	Moderate-to-strong positive: districts with more valid votes generally face higher entry quotients.
ENP (votes) → marginal seat threshold	−0.57	Moderate negative: More fragmented competition is associated with lower final-seat costs.

Source: Author’s calculations from the analytical database compiled from official district-level State Election Commission results, 2002–2024.

Table 7. Cross-district dispersion of marginal seat thresholds by election

Year	Mean	Min	Max	Range	CV%
2002	8,031	7,467	8,980	1,513	6.91
2006	6,265	5,444	7,241	1,797	10.56
2008	7,358	6,193	8,205	2,012	10.44
2011	7,880	6,274	9,356	3,082	13.56
2014	7,718	6,478	8,750	2,272	10.83
2016	8,283	6,548	9,478	2,930	13.80
2020	6,717	5,353	7,448	2,095	10.53
2024	7,135	5,980	8,096	2,116	10.52

Source: Author’s calculations from the analytical database compiled from official district-level State Election Commission results, 2002–2024.

Note: Range = maximum minus minimum district marginal threshold within the election year. Range and CV% are computed from the rounded integer threshold series reported in Table 4. CV% = coefficient of variation.

The range between the highest and lowest district marginal thresholds is narrowest in 2002 and widest in 2011 and 2016. One plausible interpretation is that years with larger vote volumes and more concentrated competition in ED3 and ED4 raise the final winning quotients in those districts, while lower vote volumes and more fragmented competition in ED6 keep its threshold comparatively lower. A causal test would require polling-station-level turnout, detailed demographic data, and party-entry variables beyond the aggregate dataset used here. The evidence should therefore be read as consistent with, rather than proof of, the proposed mechanisms.

EFFECTS ON MACEDONIAN-AND ETHNIC
ALBANIAN-LED PARTIES

The politically salient question is whether unequal district thresholds amount to an ethnic privilege. The evidence does not support a claim of formal ethnic privilege. The D’Hondt formula and district magnitude are the same for all competing lists in the six domestic districts. There are no reserved domestic seats, ethnic allocation quotas, or separate lower legal thresholds for ethnic Albanian-led lists. The evidence does show a bloc-level asymmetry in exposure to district

marginal thresholds, driven by the territorial concentration of seats rather than by differential legal treatment. This distinction is analytically important.

Table 8. Seat-weighted exposure to district marginal thresholds by bloc, 2002–2024

Bloc	Seats in the dataset	Seat-weighted marginal threshold	Difference vs Albanian-led	% difference
ethnic Albanian / Albanian-led	215	6,720	—	—
Macedonian / Macedonian-led	743	7,629	+909 votes	+13.5%

Source: Author’s calculations from the analytical database compiled from official district-level State Election Commission results, 2002–2024.

Note: The two-bloc comparison excludes two seats classified as other/minority (one in 2006 and one in 2008); bloc totals therefore sum to 958 rather than 960 domestic seats across the eight elections.

Across all eight elections, the seat-weighted marginal threshold associated with Macedonian- and Macedonian-led mandates is 7,629 votes, compared with 6,720 for ethnic Albanian- and ethnic Albanian-led mandates. The difference is 909 votes, or 13.5 percent. Substantively, this means that Macedonian-led seats were won, on average, in districts and election years where the final-seat cut-off was higher. It does not mean that every Macedonian-led mandate literally required 909 more votes than every ethnic Albanian-led mandate; the statistic summarizes differential exposure to district threshold environments.

Table 9. Mean marginal seat threshold in selected districts, 2002–2024

District	Mean marginal threshold	Comparison with ED6
ED6	6,289	Baseline: below the cross-district mean in every election
ED3	7,833	+1,544 votes (+24.6%)
ED4	8,361	+2,072 votes (+32.9%)

Source: Author’s calculations from the analytical database compiled from official district-level State Election Commission results, 2002–2024.

Table 10. Seat-weighted marginal threshold by bloc and election

Year	Alb. seats	Alb. Threshold	Mac. Seats	Mac. Threshold	Difference
2002	26	7,740	94	8,112	+372
2006	28	5,778	91	6,415	+637
2008	29	6,651	90	7,590	+939
2011	25	6,833	95	8,155	+1,322
2014	27	7,005	93	7,925	+920
2016	20	7,131	100	8,514	+1,383
2020	28	6,103	92	6,904	+801
2024	32	6,732	88	7,281	+549

Source: Author's calculations from the analytical database compiled from official district-level State Election Commission results, 2002–2024.

Note: The table reports the two major blocs only. One other/minority seat in 2006 and one in 2008 are excluded, so those two rows sum to 119 rather than 120 seats.

The seat-weighted difference between the two blocs is present in every election in the dataset, though its magnitude varies. It is smallest in 2002 and 2024 and largest in 2016. This variation is consistent with the territorial interpretation: the size of the gap changes as seat geography, vote volume, and district-level competition change, rather than remaining fixed as would be expected from a formal rule that systematically privileged one bloc.

Table 11. Territorial concentration of ethnic Albanian- and ethnic Albanian-led mandates, 2002–2024

Electoral district	Ethnic Albanian-led seats	Share of all ethnic Albanian-led seats
ED1	28	13.0%
ED2	41	19.1%
ED5	26	12.1%
ED6	120	55.8%
ED3 + ED4	0	0.0%

Source: Author's calculations from official seat allocations in the analytical database, 2002–2024

Table 11 makes the territorial mechanism transparent. More than half of all ethnic Albanian-led mandates across the eight elections are won in ED6 alone, with the remainder concentrated in ED1, ED2, and ED5. Ethnic Albanian-led parties do not win seats in ED3 or ED4 in the allocation data used for the period under study. The lower seat-weighted marginal threshold for the ethnic Albanian-led bloc, therefore, follows from the geographic distribution of its mandates across district threshold environments, not from a different legal rule for those lists.

UNREPRESENTED VOTES, SMALL PARTIES, AND THRESHOLD EFFECTS

The district-threshold mechanism also shapes opportunities for smaller parties. The article's primary analytical focus remains the marginal cut-off for the final seat, but district allocation also leaves votes cast for non-winning lists without parliamentary representation. These are referred to here as unrepresented votes rather than "wasted votes," since the latter can imply a broader normative judgment about the political value of voting. Strategic coordination theories nevertheless predict that voters and parties may respond to low perceived chances of representation by consolidating support or forming coalitions (Duverger 1954; Cox 1997).

The 2024 election illustrates this point. Using the final results after the repeated voting, lists that secured no seats under the official six-district D'Hondt model received 18,630 votes in aggregate, or 1.9 percent of 978,980 valid votes (State Election Commission of the Republic of North Macedonia 2024; OSCE/ODIHR 2024). In a national Hare largest-remainder counterfactual with all 120 seats allocated in a single district and no additional legal threshold, GROM and New Alternative would each receive one seat, while AVAJA would remain without a seat. Those two seats would come from the larger lists: in the same simulation, the VMRO-DPMNE coalition falls from fifty-eight seats to fifty-four, and the European Front and VLEN each lose one, while the SDSM coalition, Levica, and ZNAM gain. The exercise is a counterfactual illustration of how district structure can affect small,

dispersed lists; it is not a claim that Hare allocation is the uniquely “proportional” benchmark.

Table 12. Zero-seat lists in 2024 under the official model and a national Hare largest-remainder counterfactual

List	Votes	Official seats	Seats: national Hare LR
GROM	4,522	0	1
New Alternative	3,515	0	1
AVAJA	2,908	0	0
Other zero-seat lists (combined)	7,685	0	0
Total zero-seat votes	18,630	0	2

Source: Author’s calculations from final 2024 State Election Commission results, cross-checked against OSCE/ODIHR (2024); national Hare largest-remainder counterfactual.

The threshold effect is not confined to micro-parties. Levica and ZNAM both won representation in 2024, but their seat totals also vary across the counterfactual rules reported in the workbook. Under the official six-district D’Hondt model, Levica won six seats; under six-district Sainte-Laguë allocation, it would receive eight. ZNAM secured six seats under the official model and seven under a single-district D’Hondt simulation. A counterfactual single national district with a five-per-cent legal threshold produces the same allocation among the six represented lists as the one-district D’Hondt simulation shown in Table 13. The equivalence is not accidental: the six lists that clear five percent are precisely the six that win seats when no threshold is applied, and the 1.9 percent of votes removed by the threshold is too small to displace any divisor quotient. These comparisons indicate that formula and district structure can matter for medium-sized as well as very small lists.

Table 13. Official 2024 seat totals and selected simulation results

Party / list	Votes 2024	Official: 6 ED D'Hondt	6 ED Saint.- Lag.	1 district D'Hondt	1 district 5% threshold
VMRO-DPMNE coalition	436,407	58	56	56	56
SDSM coalition	154,447	18	18	19	19
DUI / European Front	137,690	18	18	17	17
VLEN	106,937	14	14	13	13
Levica	68,637	6	8	8	8
ZNAM	56,232	6	6	7	7
GROM	4,522	0	0	0	0
New Alternative	3,515	0	0	0	0
AVAJA	2,908	0	0	0	0

Source: Author’s simulations based on final 2024 State Election Commission results; official seat totals from the State Election Commission.

COUNTER-ARGUMENTS AND ANALYTICAL
QUALIFICATIONS

A first counter-argument is that the territorial pattern may itself be partly shaped by political choices over district boundaries. Formal neutrality of the D’Hondt formula does not imply that boundary design is substantively neutral. If district boundaries interact with settlement patterns, turnout, and the geographic distribution of party support, they can contribute to persistent differences in marginal thresholds. The present analysis does not identify the historical intent behind boundary design; it establishes the electoral pattern that results from the interaction of fixed district magnitude, realized vote volume, vote geography, and competition.

A second objection concerns the choice of measure. Voters-per-seat or population-per-seat measures are appropriate for diagnosing classical malapportionment because they compare constituency size with allocated representation (Riera and Lago 2023). The twentieth D’Hondt quotient answers a different question: where did the actual divisor cut-off for the last seat fall after votes were cast and distributed among

lists? It is therefore best understood as a district-level marginal winning threshold. Its advantage is that it captures election-specific competitive conditions; its limitation is equally important: it does not measure the average “value” of every vote, nor can it by itself establish classical malapportionment.

A third consideration concerns reform. A single national district would eliminate cross-district variation in final-seat thresholds by pooling votes nationally and would generally improve opportunities for geographically dispersed lists. However, such a reform involves trade-offs. A national district can weaken territorial linkage between representatives and local communities and may increase party-system fragmentation unless accompanied by a legal threshold or other balancing mechanisms. Any reform debate should therefore distinguish between the empirical diagnosis offered here and the normative choice among proportionality, inclusion, governability, and territorial representation.

Finally, ED3 and ED4 merit particular analytical attention because they repeatedly record high marginal thresholds and because ethnic Albanian-led parties do not win mandates there in the data under study. Future research should test whether these elevated cut-offs are driven primarily by valid-vote volume, concentration of competition, candidate-list structure, registered-voter distributions, or local demographic composition. Such a test would ideally use polling-station-level data and harmonized demographic information rather than infer mechanisms from aggregate district results.

POLICY OPTIONS AND COMPARATIVE PROPORTIONAL REPRESENTATION IMPLICATIONS

The findings carry three direct implications for Macedonia. First, electoral reform debates should include district-level marginal thresholds as an explicit diagnostic alongside national proportionality, classical apportionment measures, and party-system effects. Second, if the six-district model is retained, the State Election Commission or an independent research body could publish the lowest winning D’Hondt quotient for each district after every election, increasing transparency about the realized cut-off for the final mandate. Third, public debate about ethnic fairness should distinguish a territorial pattern from formal ethnic privilege. The evidence in this article supports a territorial-

concentration mechanism operating through district vote volumes and competition, not a separate allocation rule for ethnic party families.

The workbook simulations illustrate several reform pathways without treating any one as normatively superior. A single national district would pool votes and eliminate cross-district variation in final-seat thresholds. Applied to the final 2024 results, a one-district D’Hondt model would reduce the VMRO-DPMNE coalition from 58 to 56 seats, increase the SDSM coalition from 18 to 19, reduce the European Front from 18 to 17, reduce VLEN from 14 to 13, and increase Levica and ZNAM to eight and seven seats, respectively. A counterfactual five-per-cent national threshold applied to the same single-district D’Hondt allocation produces the same distribution among those six lists. An intermediate option would retain the six districts but substitute Sainte-Laguë for D’Hondt, reducing the large-list bonus without eliminating the territorial structure that generates cross-district threshold variation.

Table 14. Sum and mean number of represented lists per election under selected simulation models, 2002–2024

Model	Sum across elections	Average per election
Official 6 ED D’Hondt	49	6.13
6 ED Sainte-Laguë	60	7.50
1 national district D’Hondt	67	8.38
1 national district Sainte-Laguë	83	10.38
1 national district Danish method	98	12.25
National district with 1/120 vote-share threshold	67	8.38
1 national district D’Hondt, 5% threshold	36	4.50
1 national district D’Hondt, 10% threshold	24	3.00

Source: Author’s simulations in the accompanying workbook. Single-district rows use explicit national list-vote totals and exact rational arithmetic; the sum of the listed votes is the simulation denominator. For 2011 and 2014, published national totals include out-of-country votes while the actual-seat column remains the 120 domestic mandates, so the national models are standardized counterfactuals. The two six-district rows derive from the author’s district-level database. The documented 2002 national input limitation is reported in the replication workbook.

Table 14 makes the inclusiveness-fragmentation trade-off explicit. Across the eight elections, the official six-district D'Hondt model yields a mean of 6.1 represented lists per election. Six-district Sainte-Laguë raises the mean to 7.5, while a single national district produces 8.4 under D'Hondt, 10.4 under Sainte-Laguë, and 12.3 under the Danish method. A national threshold set at the one-seat equivalent of a 1/120 of the vote is not binding under D'Hondt and leaves the mean unchanged at 8.4, whereas counterfactual national thresholds of five and ten percent reduce it to 4.5 and 3.0, represented lists respectively. These figures should be read as institutional simulations: reform design involves trade-offs among proportionality, minority inclusion, party-system manageability, and territorial linkage.

The comparative implication extends beyond Macedonia. The twentieth D'Hondt quotient can serve as a simple *ex post* diagnostic of marginal representational access in multi-district PR systems: it records the lowest winning quotient in each district election and therefore makes territorial differences in the final-seat cut-off visible. It should be used alongside, not in place of, conventional measures of disproportionality and malapportionment. Comparative application could help distinguish inequalities generated by seat apportionment from those generated by turnout, vote volume, party fragmentation, and territorial concentration within a common allocation rule.

CONCLUSION

This article has compared the twentieth, lowest winning D'Hondt quotient across all six electoral districts of Macedonia for eight parliamentary elections from 2002 to 2024. The results reveal a persistent territorial asymmetry in marginal seat thresholds. ED4, ED3, and ED1 generally constitute higher-threshold environments, while ED6 lies below the cross-district mean in every election and records the lowest value in six of the eight contests. The mean threshold in ED4 is 8,361 votes compared with 6,289 in ED6, a difference of 2,072 votes, or 32.9 percent. Registered-voter data for 2024 show that this ordering is not a by-product of seat apportionment: the two districts with the highest mean marginal thresholds, ED4 and ED3, have the smallest electorates, and across the six districts, register size and the mean marginal threshold are negatively correlated.

The bloc-level pattern follows from this territorial geography. Ethnic Albanian- and ethnic Albanian-led parties win a majority of their mandates in lower-threshold districts, particularly ED6, whereas Macedonian- and Macedonian-led parties win more seats in higher-threshold districts, including ED3 and ED4. Their seat-weighted marginal thresholds are 6,720 and 7,629 respectively, a difference of 13.5 percent. This statistic describes the threshold environments in which seats were won; it is not evidence that the law assigns different formal values to ethnic votes. The allocation rule is common to all lists.

The broader conclusion is that analysis of electoral fairness in proportional systems should consider more than national vote-seat proportionality and formal legal thresholds. District-level outcomes also depend on where votes are cast, how realized vote volumes differ across districts, and how competition distributes those votes across divisor quotients. Equal district magnitude and an identical allocation formula can therefore coexist with unequal marginal thresholds. The twentieth D'Hondt quotient provides a transparent and replicable way to observe that specific form of territorial representational asymmetry, while classical malapportionment and individual-level vote equality remain conceptually distinct questions for separate measurement. Future research should combine this indicator with registered-voter, demographic, and polling-station data and test it comparatively in other multi-district proportional systems.

REPLICATION STATEMENT

The analysis draws on an author-compiled database constructed from official State Election Commission results for parliamentary elections from 2002 to 2024. The accompanying replication workbook contains the national list-vote inputs and actual domestic seat allocations, the district-level twentieth-quotient series reported in Table 4, the registered-voter and participation statistics reported in Table 3, the bloc seat totals and seat-weighted thresholds underlying Tables 8, 10, and 11, and the counterfactual simulations used in the reform section. The national single-district simulations in Table 14 are recomputed with exact rational arithmetic from the explicit list-vote totals in the workbook; the sum of the listed votes is used as the simulation denominator where a published valid-ballot header does not reconcile exactly with the party-list table. For 2011 and 2014, published national vote totals include

out-of-country ballots, while the actual-seat column remains the 120 domestic mandates, so the national simulations are standardized 120-seat counterfactuals. The workbook includes a *National_Data_Audit* sheet documenting these reconciliations and the remaining 2002 national-input limitation. The two six-district rows of Table 14, the mean valid-vote and ENP columns of Table 5, the correlations reported in Table 6, and the per-election bloc thresholds in Table 10 are derived from the district-level votes-by-list matrix, which is held by the author and is available on request. For 2024, national party totals use the final post-rerun results published by the State Election Commission and cross-checked against the ODIHR final results annex. Coalitions are treated as electoral lists, and bloc classifications are used only for the seat-weighted descriptive analysis.

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ТЕРИТОРИЈАЛНА АСИМЕТРИЈА ПОЛИТИЧКЕ ПРЕДСТАВЉЕНОСТИ У ПРОПОРЦИОНАЛНОМ СИСТЕМУ СА ВИШЕ ИЗБОРНИХ ЈЕДИНИЦА: МАРГИНАЛНИ ПРАГОВИ ЗА МАНДАТ У МАКЕДОНИЈИ, 2002–2024.

Резиме

Рад анализира територијалне разлике у маргиналном прагу за освајање последњег, двадесетог мандата у шест изборних јединица у Македонији на парламентарним изборима од 2002. до 2024. године. На основу званичних резултата Државне изборне комисије израчунат је двадесети, односно најнижи победнички Д’Онтов количник за сваку од 48 комбинација изборне јединице и изборне године. Показатељ се тумачи уско, као маргинални праг за последњи мандат, а не као општа индивидуална „вредност гласа” нити као мера класичног malapportionment-a, који се односи на несразмеру између броја становника или бирача и броја мандата. Резултати показују постојану територијалну асиметрију: ИЈ4, ИЈ3 и ИЈ1 углавном имају више маргиналне прагове, док је ИЈ6 у сваком изборном циклусу испод просека изборних јединица, а најнижа у шест од осам циклуса. Пондерисано бројем освојених мандата, македонске и македонски предвођене листе освајале су мандате у окружењима са просечним маргиналним прагом од 7.629 гласова, у поређењу са 6.720 код албанских и албански предвођених листа, што је разлика од 13,5%. Овај образац не произлази из резервисаних мандата, етничких квота или нижег законског прага, већ из територијалне концентрације гласова и мандата, обима важећих гласова и структуре страначке конкуренције. Подаци о броју уписаних бирача за 2024. годину показују да овај образац

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није последица неједнаке расподеле мандата: две изборне јединице са највишим просечним маргиналним праговима, ИЈ4 и ИЈ3, имају најмањи број уписаних бирача, па се територијална асиметрија креће супротно од класичне неодговарајуће заступљености (*malapportionment*). Рад стога предлаже двадесети Д'Онтов количник као једноставан, репликативан дијагностички показатељ маргиналног приступа представљању, који треба користити уз, а не уместо, стандардних мера пропорционалности и неодговарајуће заступљености (*malapportionment*).

Кључне речи: Македонија, изборне јединице, Д'Онтов метод, маргинални праг за мандат, ефективни праг, територијална асиметрија, пропорционално представљање

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THE APPROACH OF THE REPUBLIC OF SERBIA AND THE REPUBLIC OF CROATIA TOWARD THEIR COMPATRIOTS IN THE REGION AND THE DIASPORA: A COMPARATIVE ANALYSIS OF FOREIGN POLICY AND IDENTITY STRATEGIES

Abstract

This paper examines how the Republic of Serbia and the Republic of Croatia, as post-Yugoslav kin-states, formulate and implement policies toward their compatriots in the region and the diaspora. The study focuses on the concepts of the “Serbian World” and the “Croatian Corpus” as identity-based, political, and institutional frameworks for cross-border national cohesion. The theoretical framework is deliberately eclectic, combining constructivist approaches to identity with the concepts of the nationalizing state, transnational nationalism, diaspora governance, and soft power, each of which serves a distinct analytical purpose. The methodological approach employs a qualitative comparative case-study design that combines qualitative document analysis of legal and institutional material with interpretive qualitative content analysis of strategic documents, institutional materials and political discourse. By integrating legal articulation, political integration, cultural and educational infrastructure, and international positioning within a common comparative framework, the analysis shows that the Serbian model relies primarily on cultural and symbolic mobilization and on

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a mixed network of state institutions and non-state religious, cultural, and media actors. By contrast, the Croatian model is characterized by a higher degree of legal formalization, institutional coordination, and political integration of Croats outside the Republic of Croatia. The paper concludes that compatriots abroad are not merely objects of cultural concern for their kin-states, but also important resource for foreign-policy positioning, identity cohesion, and the projection of soft power.

Keywords: foreign policy, national identity, compatriots, diaspora, transnational nationalism, soft power, Republic of Serbia, Republic of Croatia, Serbian World, Croatian Corpus

INTRODUCTION

The policies of the Republic of Serbia and the Republic of Croatia toward their compatriots in the region and the diaspora illustrate the dual role of national identity in foreign policy: it can shape how states understand their interests and obligations toward cross-border national communities, while also being institutionalized and mobilized as a resource of foreign-policy action. After the dissolution of the Socialist Federal Republic of Yugoslavia (SFRY), the borders of the newly established states did not fully correspond to ethnic boundaries, leaving large numbers of Serbs and Croats outside their respective kin-states. The wars of the 1990s and subsequent economic migration further shaped Serbian and Croatian communities across Europe, North America, and Oceania, which over time became important political, cultural, and economic resources for Serbia and Croatia.

Accordingly, this paper adopts a deliberately eclectic theoretical framework that combines constructivist understandings of identity with the concepts of the nationalizing state, transnational nationalism, diaspora governance, and soft power. Rather than treating these approaches as ontologically equivalent, the paper employs them at different analytical levels: constructivism to examine how identity contributes to the formation of interests and perceived obligations, and the remaining concepts to analyze how identity-based ties are institutionalized and mobilized in cross-border policy (Wendt 1999; Hopf 2002; Brubaker 1996; Nye 2004; Ragazzi 2014; Gamlen 2014).

Existing empirical scholarship has examined several important dimensions of Serbia's and Croatia's relations with their diasporas and cross-border national communities. Garding's comparative study of Armenia, Croatia, and Serbia analyzes variation in diaspora political incorporation, particularly citizenship, external voting, and access to homeland political institutions (Garding 2013). In the Serbian case,¹ Popic examines the institutional infrastructure of diaspora policy and highlights the prominence of economic and cultural engagement, while Mylonas and Žilović demonstrate how foreign-policy priorities can shape differentiated policies towards particular co-ethnic returnee groups (Popic 2020; Mylonas and Žilović 2019). Research on Croatia has focused,² among other issues, on the institutional and social-policy framework for Croats abroad and on the distinctive system of diaspora electoral representation (Winland 2020; Kasapović 2012). A related strand of research has examined the relationship between state identity and foreign-policy orientation in Serbia and Croatia, showing how historically and socially constructed identity categories enter foreign-policy discourse and practice (Kovačević 2016). Taken together, these studies provide substantial insight into individual dimensions of diaspora policy, political incorporation, migration, and foreign-policy identity, but these dimensions have generally been examined separately or within broader comparative designs. The empirical contribution of this paper is to bring legal articulation, political integration, cultural and educational infrastructure, and international positioning into a single comparative framework applied systematically to Serbia and Croatia, and to examine how these dimensions intersect in the policies analytically discussed here through the concepts of the "Serbian World" and the "Croatian Corpus."

¹ For the purposes of Serbian legislation, "Serbs in the region" refers to members of the Serbian people living in Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, North Macedonia, Romania, Albania, and Hungary (Zakon o dijaspori i Srbima u regionu [ZDS] 2009, Art. 2 (2)). Under Serbian legislation, the diaspora encompasses Serbian citizens living abroad, as well as members of the Serbian people who emigrated from Serbia or the region and their descendants (ZDS 2009, Art. 2 (1)).

² Under Croatian legislation, "Croats outside the Republic of Croatia" comprise Croats in Bosnia and Herzegovina, members of Croatian minority communities in other states, and Croatian emigrants and their descendants (Zakon o odnosima Republike Hrvatske s Hrvatima izvan Republike Hrvatske [ZRHH] 2025, Art. 2).

Building on this literature, the aim of this paper is to provide a systematic comparative analysis of Serbia's and Croatia's policies toward their compatriots and to assess the extent to which these policies can be understood as components of their broader foreign-policy and identity strategies. Particular attention is devoted to the concepts of the "Serbian World" and the "Croatian Corpus," which are examined as distinct but comparable frameworks of cross-border national connection. While the concept of the "Serbian World" is politically contested, the Croatian model examined here is more explicitly embedded in constitutional, legal, and administrative mechanisms. Croatia's membership in the EU and NATO constitutes a distinct geopolitical and institutional context, but the higher degree of formalization identified in this paper derives primarily from its domestic legal and institutional framework.

The paper employs a qualitative comparative case-study design that combines qualitative document analysis of legal and institutional materials with interpretive qualitative content analysis of strategic documents, institutional materials, and political discourse. The analysis proceeds from the assumption that both states pursue deliberate policies and strategies toward their compatriots, but that these policies are shaped by different historical experiences, national narratives, institutional capacities, and foreign policy priorities.

THEORETICAL FRAMEWORK: NATIONAL IDENTITY AS A CONSTITUTIVE FACTOR AND FOREIGN-POLICY RESOURCE

In contemporary international relations, national identity can enter foreign-policy analysis in two analytically distinct but interconnected ways: as a constitutive factor that shapes how states understand their interests, roles, and obligations, and as a political resource that can be institutionalized and mobilized in pursuit of foreign-policy objectives. States do not shape their international position solely through military, economic, or diplomatic power, but also through culture, values, collective memory, and enduring ties with compatriots beyond their borders (Nye 2004, 4–11; Shain and Barth 2003, 449–453). Identity occupies different analytical positions within the literature on foreign policy. In constructivist approaches, it is not merely an instrument available to actors whose interests are fixed in advance; rather, identity can help constitute those interests in the first place. Wendt's systemic

constructivism emphasizes how state identities and interests are shaped through social interaction and role relations within the international system, rather than treating them as exogenously given (Wendt 1999). Hopf, while sharing the constructivist premise that identities matter, assigns greater explanatory weight to domestic social identities, discourses, and historically embedded understandings through which foreign-policy actors interpret both themselves and the external world (Hopf 1998; Hopf 2002). The distinction is important because national identity may be generated and reproduced through both international interaction and domestic social processes.

Identity may also acquire an instrumental dimension once particular understandings of political community and belonging have been constituted. Political actors can mobilize cultural, linguistic, religious, and historical attachments through laws, institutions, symbolic practices, public diplomacy, and diaspora policies. Identity, therefore, need not be understood exclusively either as a determinant of foreign policy or as an instrument of it: it can shape the definition of interests and subsequently become a resource through which those interests are pursued. This two-stage relationship is particularly relevant to kin-state policies, because the prior definition of who belongs to the national community helps constitute the state's perceived obligations toward compatriots abroad (Brubaker 1996). Political and institutional mechanisms can subsequently translate those obligations into concrete forms of cross-border engagement and mobilization (Nye 2004; Ragazzi 2014; Gamlen 2014).

Rogers Brubaker's framework further distinguishes between the nationalizing state and the external national homeland. The former refers to states in which a titular or core nation is understood as the legitimate owner of the state but as not yet fully realized in cultural, political, or socioeconomic terms, whereas the latter denotes a state that claims a special responsibility for the welfare and interests of its ethnonational kin living in another state (Brubaker 1996, 55–76). The concept of the external national homeland is particularly relevant to the post-Yugoslav space, where the dissolution of the common state, the establishment of new borders, and wartime migrations produced substantial cross-border national communities. Furthermore, Joseph Nye's concept of soft power emphasizes the ability of a state to affect the preferences of other actors through attraction rather than coercion or material inducements. In the context of diaspora policies, identity-based

cultural ties can become one of the sources of such power. Comparative research on diaspora governance further shows that states increasingly institutionalize relations with emigrants and their descendants through dedicated institutions, rights, and programs that extend state practices beyond territorial borders (Ragazzi 2014; Gamlen 2014).

Accordingly, the theoretical framework adopted in this paper is deliberately eclectic rather than paradigmatically unified. Constructivist approaches are used to conceptualize the constitutive relationship between identity and interests; Brubaker's concepts of the nationalizing state and the external national homeland specify the relationship between kin-states and cross-border national communities; and Nye's concept of soft power, together with the literature on diaspora governance, helps identify the mechanisms through which cultural and identity-based ties are institutionalized and mobilized. These approaches rest on different ontological and epistemological premises and are therefore not treated as components of a single unified theory, but as complementary analytical lenses addressing different dimensions of the same phenomenon.

This theoretical framework allows for a clearer understanding of the differences between the "Serbian World" and the "Croatian Corpus". The concept of the "Serbian World" is not treated here as a codified state doctrine, but as a discursive, symbolic, and identity-based framework that connects Serbian communities through language, script, religion, culture, historical memory, and a sense of belonging to a shared cultural and value-based space. By contrast, the "Croatian Corpus" has a less pronounced discursive and symbolic articulation, but is more firmly embedded in the legal and institutional system of the Republic of Croatia. It is realized through constitutional norms, legal mechanisms, cultural and educational programs, and the political representation of the diaspora, making it a more formalized model of cross-border national connection.

METHODOLOGY AND RESEARCH DESIGN

This study employs a qualitative comparative case-study design. The comparison follows the logic of structured, focused comparison, whereby the same set of analytical questions is applied to both cases in order to enable systematic comparison (George and Bennett 2005, 67–72). The research combines two complementary analytical procedures: qualitative document analysis of legal and institutional materials (Bowen

2009) and interpretive qualitative content analysis of political and discursive sources (Krippendorff 2004). Constitutional provisions, laws, strategies, and official institutional documents are examined as evidence of the formal legal and organizational design of kin-state policies, while public statements, political narratives, media materials, and symbolic practices are analyzed interpretively in order to reconstruct how these policies are framed, justified, and connected to broader identity and foreign-policy objectives (Krippendorff 2004; Bowen 2009). Legal texts are therefore not treated primarily as objects of doctrinal legal interpretation, but as empirical evidence of formal policy design and the degree of institutionalization of relations with compatriots abroad.

Serbia and Croatia were selected because of their shared Yugoslav (SFRY) legacy, geographical proximity, and experience of the dissolution of the SFRY, as well as because both have developed policies toward compatriots beyond the borders of the kin-state. Their substantial historical and structural similarities provide a common basis for systematic comparison, while differences in legal institutionalization, political incorporation, and geopolitical positioning provide meaningful variation in the forms through which kin-state policies are articulated. The temporal scope extends from Croatia's independence and Serbia's restoration of state independence to the contemporary period, with particular attention to the more recent articulation of the concepts of the "Serbian World" and the "Croatian Corpus."

The empirical corpus consists of constitutional and legal acts, strategic documents, institutional regulations and reports, public statements by state and political representatives, materials produced by institutions responsible for diaspora and compatriot affairs, and selected media content documenting political discourse. Media sources are therefore used primarily as records of political statements and public discourse rather than as substitutes for legal, institutional, or scholarly evidence.

To connect the theoretical framework with the empirical comparison, the analysis is structured across four dimensions that are applied consistently to both cases. The first, legal articulation, examines constitutional obligations, legislation, strategic documents, and specialized institutional arrangements. The second, political integration, considers mechanisms through which compatriots are incorporated into political processes, including electoral representation, consultative bodies, and other formal channels of participation. The third, cultural

and educational infrastructure, covers educational programs, cultural institutions, religious and societal actors, media support, and related forms of identity maintenance. The fourth, international positioning, examines how policies toward compatriots are framed in political discourse and connected to broader regional, diplomatic, and geopolitical objectives.

The study does not treat the “Serbian World” and the “Croatian Corpus” as equivalent official doctrines, but as distinct analytical frameworks through which broader processes of cross-border identity politics can be compared. This distinction is particularly important because the two concepts differ substantially in their degree of official codification, discursive visibility, and institutional articulation. The analysis, therefore, focuses on the observable legal, institutional, cultural and discursive practices associated with each model rather than assuming equivalence between them.

The study does not seek to measure the causal effects or effectiveness of these policies, nor to establish the degree of influence exercised by either state over compatriot communities. Its purpose is comparative and interpretive: to identify how relations with compatriots are formally organized, politically articulated, and symbolically framed, and to assess their place within broader identity and foreign-policy strategies. Legal and strategic documents reveal formal obligations, institutional arrangements, and stated policy objectives, but do not by themselves establish implementation or policy effects; public statements and media materials illuminate political framing and discourse, but cannot be treated as direct measures of policy outcomes. The conclusions should consequently be understood as analytical interpretations of policy structures and practices rather than as causal or quantitatively measurable estimates of their effects.

THE POLICY OF THE REPUBLIC OF SERBIA TOWARD SERBS IN THE REGION AND THE DIASPORA: THE “SERBIAN WORLD” CONCEPT

Historical and Legal Foundations

Following Montenegro’s declaration of independence in 2006 and the dissolution of the State Union of Serbia and Montenegro, Serbia became an independent kin-state in relation to substantial

Serbian communities living beyond its borders. Article 13 of the 2006 Constitution of Serbia provides that the Republic of Serbia protects the rights and interests of its citizens abroad and develops and advances relations between Serbs living abroad and their kin-state (Ustav Republike Srbije 2006, Art. 13). In the same year, the “Declaration on Relations between the Homeland and the Diaspora as Relations of the Highest State and National Interest” was adopted. It articulated the idea of a unified national corpus and emphasized the special bond between the homeland and the diaspora (Deklaracija o proglašenju odnosa otadžbine i dijaspore odnosom od najvećeg državnog i nacionalnog interesa 2006). This policy was further regulated by the “Law on the Diaspora and Serbs in the Region” (ZDS 2009, Arts. 9–12) and by the 2011 “Strategy for Preserving and Strengthening Relations between the Kin-State and the Diaspora, and between the Kin-State and Serbs in the Region” (Strategija 2011). The Strategy places particular emphasis on preserving identity, strengthening institutional ties, and supporting educational, cultural, and informational activities among Serbs in the region, including in Bosnia and Herzegovina and Montenegro (Strategija 2011). The “Agreement on the Establishment of Special Parallel Relations between Republic of Srpska and the Republic of Serbia” also provides an institutional framework for cooperation in areas including the economy, science and technology, education, culture and sport, health and social policy, tourism and environmental protection (Sporazum o uspostavljanju specijalnih paralelnih odnosa između Republike Srpske i Republike Srbije 2006, Art. 2).

At the strategic level, the 2019 National Security Strategy places care for the Serbian people outside Serbia within the broader framework of the state’s national and security interests (Narodna skupština Republike Srbije [NSRS] 2019). A more recent form of institutional articulation is the “Declaration on the Protection of the National and Political Rights and the Common Future of the Serbian People,” proclaimed at the First All-Serbian Assembly in Belgrade on 8 June 2024 and subsequently adopted by the National Assembly of the Republic of Serbia (Deklaracija 2024).

Against this institutional and legal background, the contemporary discourse of the “Serbian World” can be analyzed as a broader symbolic and identity-based framework in which historical memory, national values, cultural policy, and cross-border ties intersect. In this paper, the concept is not treated as a codified state doctrine, but as a discursive

framework whose elements overlap with existing policies toward Serbs in the region and the diaspora (Ljubomirović 2024, 121–125).

“The Serbian World” as a Framework of National Cohesion

The symbolic and identity-based dimensions of the “Serbian World” are central to understanding how cultural, value-based, and political ties with Serbs beyond Serbia’s borders are articulated. In nationally affirmative interpretations identified in previous research, the “Serbian World” is presented as a cultural and value-based whole founded on language, script, religion, cultural heritage, collective memory, and historical experience (Ljubomirović 2024, 121). The contemporary articulation of the “Serbian World” frames cultural heritage, linguistic community, and shared values as resources of national cohesion and soft power, expressed through cultural, identity-based, educational, media, and commemorative practices rather than through formal legal codification as a state doctrine (Ljubomirović 2024, 125). Joint commemorations of national holidays and memorial events function as forms of collective memory and cultural connection among Serbs in Serbia, the Republic of Srpska, Montenegro, North Macedonia, the wider region, and the diaspora. The Day of Serbian Unity, Freedom and the National Flag, observed on September 15, provides a prominent example of the symbolic articulation of national unity through language, culture, historical memory and national symbols, with the participation of representatives from Serbia, the Republic of Srpska and Serbian communities in the region (Ljubomirović 2024, 106).

Public statements by Serbian officials and by Serb political actors in the region also contribute to the political articulation of the concept. Aleksandar Vulin, who was serving as Serbia’s minister of the interior at the time, argued that Serbs should become a single political nation and described this as a first step toward unification (Politika Online 2022). Andrija Mandić, president of the largest Serbian party in Montenegro, emphasized that “the borders that exist between us do not exist in our minds [...] in the end, we are one people” (Vukićević and Tuhina 2021). Taken together, these statements articulate an identity narrative centered on political and cultural unity across state borders and can be interpreted through Brubaker’s concept of the external national homeland (Brubaker 1996, 55–76).

The symbolic articulation of the concept draws on recurring elements of Serbian cultural identity, including the Cyrillic script, the Serbian Orthodox Church, cultural heritage, language, and historical memory. Through supplementary education, cultural programs, media support, and diaspora organizations, state and non-state actors maintain ties with Serbian communities abroad (Popic 2020; Ministry of Foreign Affairs of the Republic of Serbia [MFARS] 2026). Analytically, the concept can therefore be situated at the intersection of Brubaker's external-national-homeland framework and soft-power approaches: identity-based ties are understood not as evidence of measurable political influence, but as resources that political actors may seek to mobilize in support of national cohesion and foreign-policy positioning (Brubaker 1996; Nye 2004; Ljubomirović 2024).

Political Articulation and Foreign Policy of the Republic of Serbia

In practice, the "Serbian World" can be analyzed as a framework of cross-border connection in which cultural, identity-based, and symbolic affinities intersect with institutional, cultural, and foreign-policy practices directed toward Serbs beyond Serbia's borders.

A central state institution in Serbia's policy toward the diaspora and Serbs in the region is the Directorate for Cooperation with the Diaspora and Serbs in the Region within the Ministry of Foreign Affairs. The Directorate administers project-support programs for organizations abroad, including activities related to supplementary education, cultural initiatives, and the preservation of Serbian language, script, and identity (Popic 2020; MFARS 2026). A related institutional development was the establishment of the Office for Public and Cultural Diplomacy in 2024. Its mandate includes promoting Serbia's national interests and presenting Serbian culture, history, spirituality, art, language, science, and sport to domestic and international audiences (Uredba o osnivanju Kancelarije za javnu i kulturnu diplomatiju 2024).

Actors outside the state apparatus also participate in maintaining cross-border cultural and identity ties, including the Serbian Orthodox Church, Matica Srpska, the Vuk Foundation, "Prosvjeta," media organizations and diaspora associations (Ljubomirović 2024, 130). In this paper, the Serbian Orthodox Church is treated as an autocephalous Orthodox Church and a non-state actor with a cross-border organizational

presence. In addition to its religious role, it contributes to the preservation of language, script, historical memory, and a sense of belonging among Serbian communities beyond Serbia's borders.

Taken together, these institutional, cultural, and societal practices provide the broader context in which the "Serbian World" can be analyzed as a framework linking cross-border identity maintenance with elements of diaspora policy and public and cultural diplomacy. The analysis identifies an overlap between the identity themes associated with the concept and existing policies and practices directed toward Serbs in the region and the diaspora.

THE POLICY OF THE REPUBLIC OF CROATIA TOWARD CROATS IN THE REGION AND DIASPORA: THE "CROATIAN CORPUS" CONCEPT

Constitutional and Legal Foundations

The Croatian approach to compatriots in the region and the diaspora is characterized by a high degree of legal formalization, institutional coordination, and political integration. Although the term "Croatian Corpus" is not codified in official documents, it is used in this paper as an analytical concept to describe a formalized framework of constitutional, legal, and institutional relations between the Republic of Croatia and Croats living beyond its borders. Article 10 of the Constitution of the Republic of Croatia provides that the state protects the rights and interests of its citizens living or residing abroad and promotes their ties with the homeland, while also guaranteeing special care and protection to parts of the Croatian people living in other states (Ustav Republike Hrvatske 2014, Art. 10).

On the basis of this constitutional framework, the "Law on Relations of the Republic of Croatia with Croats outside the Republic of Croatia" was adopted in 2011. It defines Croats outside the Republic of Croatia as an "equal part of one and indivisible Croatian people" and establishes a broad framework for the state's relations with these communities (ZRHH 2025, Art. 4). The Law extends this framework across cultural, educational, political, economic and diplomatic fields, establishing objectives related to the preservation of identity, the strengthening of ties with Croatia, political and social inclusion, return

and immigration, and the protection of the rights and position of Croats abroad (ZRHH 2025, Arts. 5–9).

Institutionalization is centered on the Central State Office for Croats outside the Republic of Croatia and the Council of the Government of the Republic of Croatia for Croats outside the Republic of Croatia. The Office coordinates relevant state activities and supports the protection of rights, identity, and ties with Croats abroad, while the Council serves as an advisory body whose membership includes representatives of Croatian communities outside the country. A distinctive feature of the Croatian model is the special 11th electoral constituency, through which Croatian voters without residence in the Republic of Croatia elect three members of the Croatian Parliament, thereby providing a direct institutional channel of political representation (Collyer 2014, 55–72; Garding 2013; Kasapović 2012; Zakon o izborima zastupnika u Hrvatski sabor 2019, Art. 8). In the analytical terminology of this paper, these arrangements constitute the principal institutional foundations of what is described as the “Croatian Corpus.”

Cultural and Educational Infrastructure

Cultural and educational infrastructure constitutes a key component of Croatia’s policy toward Croats outside the Republic of Croatia. Its principal functions include the preservation of language, culture, and national identity, as well as the maintenance of institutional ties between Croatia and Croatian communities abroad (Čizmić, Sopta, and Šakić 2005, 52).

At the center of this policy is the system of Croatian teaching abroad. The Ministry of Science, Education, and Youth organizes and fully or partially finances Croatian teaching in 20 countries, while additional programs are integrated into the educational systems of host countries or organized by Croatian communities and Catholic missions. The Ministry also selects and employs teachers and provides the curricular framework for Croatian teaching abroad (Ministry of Science, Education, and Youth of the Republic of Croatia [MSEYRC] n.d.). The National Plan identifies the strengthening of ties and cooperation, the use and promotion of the Croatian language, and the preservation of Croatian identity as continuing policy priorities, while its measures extend through 2027 (Nacionalni plan 2022).

Catholic missions and church institutions also form part of this cross-border cultural and educational infrastructure. The Ministry of Science, Education, and Youth explicitly identifies Catholic missions among the organizers of Croatian teaching abroad, alongside Croatian communities and the educational authorities of host states (MSEYRC n.d.). Financial support is further provided through the programs of the Central State Office for Croats outside the Republic of Croatia, which funds cultural, educational, media, and community projects of Croatian organizations abroad (Središnji državni ured 2025). Within the analytical framework of this paper, cultural and educational policies therefore constitute key mechanisms through which cross-border identity ties are institutionalized and through which what is conceptualized here as the “Croatian Corpus” acquires a concrete institutional dimension.

Political Rhetoric and the Regional Dimension

Political rhetoric concerning Croats outside the Republic of Croatia constitutes an important discursive dimension of Croatia’s cross-border policy and regional foreign-policy positioning. In this context, concern for Croats abroad is framed in Croatian law and political discourse not merely as a cultural or humanitarian matter, but as a component of domestic and foreign policy and, particularly in relation to Croats in Bosnia and Herzegovina, as a national and strategic interest. This can be interpreted through Brubaker’s concept of the external national homeland, which captures the claim of kin-states to a special responsibility toward co-nationals living beyond their borders (Brubaker 1996, 63; ZRHH 2025, Art. 6; Predsjednik Republike Hrvatske 2022).

The position of Croats in Bosnia and Herzegovina occupies a central place in Croatian regional political discourse. President Zoran Milanović framed the issue in terms of constituent equality and political representation and described the survival, constituent status, and welfare of Croats in Bosnia and Herzegovina as a strategic interest of Croatia (Predsjednik Republike Hrvatske 2022). This emphasis is not confined to a single presidency. Former President Kolinda Grabar-Kitarović emphasized that Bosnia and Herzegovina was Croatia’s number one priority, stressing that “Croats in Bosnia and Herzegovina are not a diaspora, they are one of the three constituent peoples” and that Croatia has an obligation to advocate for their equality (Jutarnji list 2015).

Croatia's membership in the European Union and NATO provides an additional institutional context in which these issues are articulated. During Croatia's presidency of the Council of the European Union in 2020, Croatian diplomacy emphasized Bosnia and Herzegovina's European path, the equality of its three constituent peoples, and the need for electoral reform ensuring the legitimate representation of Croats in state institutions (Ministry of Foreign and European Affairs of the Republic of Croatia [MFEARC] 2020). In this way, Croatian national interests are articulated through a broader European institutional and political vocabulary.

The Croatian model can therefore be understood as possessing a soft-power dimension insofar as cultural and identity-based ties with Croats abroad are connected to broader foreign-policy objectives. This interpretation is reinforced by Croatia's strategic planning documents, which identify Croats outside the Republic of Croatia as an important factor in achieving the goal of "global recognizability and strengthening the international position and role of Croatia," while treating support for the survival, continued presence, and equality of Croats in Bosnia and Herzegovina as a strategic interest of the Republic of Croatia (Nacionalni plan 2022).

COMPARATIVE ANALYSIS OF THE SERBIAN AND CROATIAN MODELS

A comparative analysis of the policies of the Republic of Serbia and the Republic of Croatia toward their compatriots in the region and the diaspora reveals two distinct, yet structurally comparable, models of cross-border national policy. Both constitutions establish obligations concerning citizens or co-nationals living beyond state borders, but the two states translate these obligations into different institutional, cultural and political arrangements (Ustav Republike Srbije 2006, Art. 13; Ustav Republike Hrvatske 2014, Art. 10). Their comparison can therefore be carried out systematically through four key dimensions: legal articulation, political integration, cultural and educational infrastructure, and international positioning.

From the standpoint of legal regulation, both Serbia and Croatia recognize in their constitutions the obligation of the state to care for compatriots beyond its borders. The difference lies in the degree of institutional elaboration. In this respect, the Serbian model places

comparatively greater weight on cultural and symbolic mechanisms, while the Croatian model is characterized by a higher degree of legal formalization and administrative coordination.

At the level of political integration, the difference is particularly visible. In Croatia, voters without residence in the Republic of Croatia elect three members of the Croatian Parliament in the special 11th electoral constituency, providing a direct institutional channel of parliamentary representation (Collyer 2014, 55–72; Garding 2013; Kasapović 2012; *Zakon o izborima zastupnika u Hrvatski sabor* 2019, Art. 8). Serbia, by contrast, elects members of the National Assembly in a single nationwide constituency and therefore has no separate electoral constituency for the diaspora or Serbs in the region (*Zakon o izboru narodnih poslanika* 2022, Art. 5). In analytical terms, the “Serbian World” is examined primarily as a discursive and symbolic framework of national cohesion, whereas the arrangements conceptualized here as the “Croatian Corpus” display a more formalized institutional and political dimension.

In the cultural and educational sphere, both states maintain programs directed toward language, culture, and identity, but the institutional arrangements differ. The Croatian model includes a state-supported system of Croatian teaching abroad: the Ministry of Science, Education, and Youth organizes and fully or partially finances Croatian teaching in 20 countries, while additional programs are integrated into host-country educational systems or organized by Croatian communities and Catholic missions (MSEYRC n.d.). In the Serbian case, supplementary education, cultural programs, media support, and cooperation with diaspora organizations are implemented through public calls, project-based support, and cooperation with state institutions and non-state religious and cultural actors (Strategija 2011; Popic 2020; MFARS 2026). The Serbian model is therefore less centrally standardized and more reliant on a mixed network of state and non-state actors, while the Croatian model is more formally standardized and administratively coordinated. Differences are also visible in political discourse. In the Croatian official statements examined here, the status of Croats in Bosnia and Herzegovina is framed through the language of constituent equality, legitimate political representation, European integration, and regional stability (Predsjednik Republike Hrvatske 2022; MFEARC 2020). In the Serbian documents and statements examined in this study, greater emphasis is placed on national and cultural rights, language, religion,

historical memory, and cross-border identity cohesion (Deklaracija 2024; Ljubomirović 2024). The two models also operate within different geopolitical and institutional environments. Croatia's membership in the European Union and NATO situates its policies within a Euro-Atlantic institutional context, while EU membership in particular provides additional institutional settings in which Croatian positions concerning Bosnia and Herzegovina can be articulated through the language of enlargement, constituent equality, and institutional reform (MFEARC 2020). Serbia, by contrast, remains an EU candidate country, while its 2019 National Security Strategy identifies both European integration and military neutrality among its starting points (European Commission 2024; NSRS 2019). These differences shape the institutional channels and political vocabulary through which the two models are internationally articulated, rather than determining the legitimacy of either model as such.

In synthetic terms, the comparison across the four analytical dimensions identifies two distinct configurations of transnational, or cross-border, nationalism rather than two mutually exclusive models. The Serbian case places comparatively greater weight on cultural and symbolic mobilization, mixed networks of state and non-state religious, cultural, and media actors, and discursive forms of national cohesion. The Croatian case displays a higher degree of legal codification, administrative coordination, and direct political integration through dedicated state institutions, advisory structures, and parliamentary representation. These differences are primarily differences of institutional configuration and degree: both states employ legal, political, cultural, and symbolic mechanisms, but assign them different relative weight.

CONCLUSION

The analysis of the policies of the Republic of Serbia and the Republic of Croatia toward their compatriots in the region and the diaspora shows that, in the two cases examined here, national identity is not merely a matter of cultural heritage, but both a constitutive element of how kin-states understand their obligations toward cross-border national communities and a resource that can be mobilized in foreign-policy practice. Although the concepts of the "Serbian World" and the "Croatian Corpus" differ in their degree of institutional articulation, legal formalization, and symbolic visibility, the analysis shows that

cross-border national communities are incorporated into both models as relevant resources for identity cohesion, foreign-policy positioning, and the potential projection of soft power.

The Serbian model places comparatively greater weight on cultural and symbolic mobilization and on a mixed network of state and non-state religious, cultural, and media actors. The “Serbian World” is not treated in this paper as a codified state doctrine, but as a discursive and symbolic framework in which cross-border identity cohesion intersects with elements of diaspora policy, cultural diplomacy, and foreign-policy positioning. By contrast, the Croatian model is characterized by a higher degree of legal formalization and institutional integration, expressed through constitutional provisions, dedicated legislation, the Central State Office, the Council for Croats outside the Republic of Croatia, the 11th electoral constituency, and cultural and educational programs.

The empirical contribution of the analysis lies in bringing dimensions of kin-state policy that are often examined separately into a common comparative framework. Rather than approaching diaspora and kin-state policy primarily through a single domain such as citizenship, electoral participation, social protection, or migration, the study compares Serbia and Croatia systematically across four dimensions: legal articulation, political integration, cultural and educational infrastructure, and international positioning. This framework makes it possible to identify not only differences in individual policy instruments, but also broader patterns through which Serbia and Croatia organize and politically articulate relations with cross-border national communities. The boundary between domestic and foreign policy consequently becomes more porous, as policies toward compatriots connect questions of national belonging and political community with regional and international positioning. This conclusion is consistent with the constitutive understanding of identity advanced by constructivist scholarship, while the findings also illuminate its subsequent instrumental dimension: national identity contributes to defining political community, interests, and perceived obligations, whereas the resulting cultural and institutional ties can subsequently be institutionalized and mobilized in foreign-policy practice (Wendt 1999; Hopf 2002; Brubaker 1996; Nye 2004; Ragazzi 2014; Gamlen 2014). Cultural, institutional, and political ties with compatriots can be mobilized in support of identity cohesion, diplomatic and foreign-policy positioning, and soft-power strategies,

although the present study does not measure their effectiveness or the degree of influence they generate.

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ОДНОС РЕПУБЛИКЕ СРБИЈЕ И РЕПУБЛИКЕ ХРВАТСКЕ ПРЕМА СУНАРОДНИЦИМА У РЕГИОНУ И ДИЈАСПОРИ: УПОРЕДНА АНАЛИЗА СПОЉНОПОЛИТИЧКИХ И ИДЕНТИТЕТСКИХ СТРАТЕГИЈА

Резиме

Распад СФРЈ и потоњи миграциони токови довели су до тога да значајан број Срба и Хрвата живи изван граница матичних држава, због чега су односи Србије и Хрватске према сународницима у региону и дијаспори постали трајно поље преплитања националног идентитета, унутрашње политике и спољнополитичког деловања. Рад упоредно испитује правне, институционалне, културне и дискурзивне механизме посредством којих две државе обликују и одржавају везе са сународницима и настоји да утврди у којој мери се те политике могу разумети као део ширих идентитетских и спољнополитичких стратегија. Појмови „Српски свет” и „Хрватски корпус” не третирају се као истоветне нити као нужно званично кодификоване доктрине, већ као различити, али аналитички упоредиви оквири прекограничног националног повезивања. Конструктивистички приступи користе се за разумевање конститутивне везе између идентитета и интереса, Брубакерови концепти национализујуће државе и спољне националне матице за анализу односа државе и прекограничних националних заједница, док Најев концепт меке моћи и литература о управљању дијаспором омогућавају анализу начина на који се идентитетске везе институционализују и мобилишу. Истраживање је постављено као квалитативна упоредна студија случаја Србије и Хрватске и обједињује квалитативну анализу правних и институционалних докумената са интерпретативном квалитативном анализом политичких и дискурзивних извора. Поређење је организовано у

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четири димензије: правно уређење, политичка интеграција, културна и образовна инфраструктура и међународно позиционирање. Налази показују да српски модел придаје релативно већу тежину културно-симболичкој мобилизацији и мешовитој мрежи државних и недржавних верских, културних и медијских актера. „Српски свет” се у раду не посматра као кодификована државна доктрина, већ као дискурзивни, симболички и идентитетски оквир у којем се прекогранична национална кохезија преплиће са елементима политике према дијаспори, културне дипломатије и спољнополитичког позиционирања. Хрватски модел одликују виши степен правне формализације, административне координације и непосредне политичке интеграције Хрвата изван Републике Хрватске. Једанаеста изборна јединица омогућава непосредно парламентарно представљање хрватских бирача без пребивалишта у Републици Хрватској. Посебно место заузима положај Хрвата у Босни и Херцеговини, који се у анализираном хрватском политичком дискурсу повезује са питањима конститутивне равноправности, политичког представљања, европских интеграција и националног интереса. Иако је израз „Хрватски корпус” знатно мање присутан као политичка синтагма, политика коју тај појам у раду аналитички означава чвршће је уграђена у правни и институционални поредак. Упоредна анализа упућује на две различите конфигурације транснационалног, односно прекограничног национализма, а не на два међусобно искључива модела. Разлике су, дакле, пре свега разлике у институционалној конфигурацији и релативном значају појединих механизма, а не апсолутна супротност два приступа. Основни закључак рада јесте да национални идентитет у два анализирана случаја има двоструку улогу: учествује у обликовању политичке заједнице, интереса и схватања обавеза матичне државе према сународницима, а тако успостављене културне и институционалне везе могу се потом институционализовати и мобилисати у спољнополитичкој пракси. Емпиријски допринос рада огледа се у томе што правно уређење, политичку интеграцију, културну и образовну инфраструктуру и међународно позиционирање обједињује у јединственом компаративном оквиру и систематски примењује на случајеве Србије и Хрватске. Такво поређење показује да се политике према сународницима налазе на пресеку унутрашње и спољне политике

и да границу између ова два нивоа политичког деловања чине пропустљивијом.

Кључне речи: спољна политика, национални идентитет, сународници, дијаспора, транснационални национализам, мека моћ, Република Србија, Република Хрватска, „Српски свет”, „Хрватски корпус”

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RELIGIOUS NATIONALISM: THE BALKAN EXPERIENCE**

Abstract

This paper examines the pivotal role of religion in shaping Balkan nationalisms. It aims to identify specific aspects of this process and categorize local nationalisms accordingly. Employing phenomenological analysis, the study explores the development of national identity in the Balkans, operating under the central assumption that religion has been crucial in defining identity boundaries. While acknowledging the significance of language, particularly in the Albanian context, the paper primarily focuses on the religion's impact. The analysis begins by considering historical-institutional settings, positing that religious nationalism in the Balkans should be viewed as a product of specific historical developments marked by key turning points that determined this development, including identity movements. The key findings highlight religion as a primary driver of national identity formation in the Balkans. The linguistic similarities among the South Slavic population further facilitated this development, with religious communities emerging as central players in shaping national identities.

Keywords: religious nationalism, Balkans, myths, millet system, national identity

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INTRODUCTION

Understanding the complexities of the Balkan region – its history of conflicts, attitude towards history, and current interstate relations – requires a deep insight into the very structure of national identities. This requires a comprehensive examination of identity development and the critical junctures that have guided its evolution. A central question arises: what form do Balkan nationalisms take? Can they be categorized within the classic ethnic-civic dichotomy, or do they represent a distinct model primarily shaped by religious influence? This paper aims to demonstrate the fundamental importance of religion as a limiting factor in the formation of the Balkan nations. At the same time, bearing in mind the different phases of the development of the national identities of the Balkan peoples, within which there were attempts to reaffirm it as a more inclusive model that would embrace members of different confessions, it is important to note that this paper focuses on the formative period of the construction of national identities, when religion was the main marker of demarcation. This does not suggest a purely religious model, as the region's development has been significantly influenced by broader European ideas that largely shaped national communities. However, it is undeniable that within this specific historical trajectory, religion has emerged as a fundamental factor of national identity. Therefore, this does not mean that religion is the exclusive factor, given that language was and remains essential. Where it was not possible to draw the boundaries of national belonging based on religious criteria, language was resorted to as a link of homogenization. The Albanian case, in particular, highlights the need for caution in such categorizations.

The pervasive overlap of ethnic and religious elements in the construction of most contemporary Balkan nationalisms points to religious nationalism as a crucial framework for further analysis. In this regard, the paper will first define and outline the basic characteristics of religious nationalism. Additionally, it will then trace its historical development, identifying critical moments that steered this identity evolution. A special focus will be given to the Ottoman millet system and its profound influence on establishing religion and religious communities as key factors of (later) national integration. While acknowledging historical context, the paper primarily focuses on the religious character of national identities rather than an exhaustive historical analysis of the concluding section will address national myths as a flagrant indicator

of the intricate connection and intertwining of ethno-religious elements in the construction of contemporary Balkan national identities. This is an eclectic approach to this problem. Therefore, this paper can be methodologically viewed, on the one hand, as a historical-comparative analysis and, on the other, as a theoretical synthesis of the literature and an interpretative analysis of discourse. Also, the development itself is viewed through the prism of historical institutionalism, specifically the concept of path dependence. It is important to note that each Balkan national project and movement exhibited specific features during its development, which is why the paper provides an overview of that development, with a focus on religion, which, in most cases, played a decisive role.

RELIGIOUS NATIONALISM – DEFINITION AND CHARACTERISTICS

Different definitions of nationalism can be found in the literature. One of those definitions offered by Anthony Smith defines nationalism as “the whole process of forming and maintaining nations or nation-states” (Smith 1991, 72). Typologies of nationalism usually begin by distinguishing between civic and ethnic concepts. The civic model is primarily rooted in a territorial understanding, asserting that nations must possess a defined territory with deeper historical significance. This perspective also emphasizes the existence of a legal and political community, the equality of all its members, and a shared civic ideology and culture as fundamental elements (Smit 2010, 23–26). In contrast, the ethnic model is based on a culture of origin and a community of birth as fundamental features. It underscores the importance of language and customs for a nation’s survival and development (Smit 2010, 26–27). In this context, the ethnic model is inseparable from religion, as religion often serves as the genesis of the culture, tradition, and customs that derive their meaning from its religious foundation.

However, despite religion’s undeniable influence on the formation and shaping of ethnic nationalism, religious nationalism constitutes a distinct form, profoundly and decisively marked by religious influence. Kemal Karpat terms this type of nationalism communal, defining it as a synthesis of religious and ethnic elements (Karpat 2019, 21). Barbara Rieffer similarly describes religious nationalism as an inseparable combination of nationalism and religion, characterizing it as a model

denoting “a community of religious people or the political movement of a group of people heavily influenced by religious beliefs who aspire to be politically self-determining” (Rieffer 2003, 225). Religion provides symbolic material, forming the basis for the constitution and shaping of national identities by filling collectivities with new cultural content and sources of authority (Friedland 2001, 139).

While authors like Barbara Rieffer emphasize the high probability of religious nationalism emerging in religiously homogeneous states (Rieffer 2003, 225–226), Goalwin argues that it is precisely the existence of religious heterogeneity that dictates and conditions the emergence and development of religious nationalism (Goalwin 2022, 21). According to Goalwin, religious diversity, a common threat, moments of structural social change, a high level of religiosity, and a position in border religious areas are the primary conditions for the emergence of a religious nationalist movement (Goalwin 2022, 22). This perspective aligns with Barker’s assertion that religious boundaries and threats are key factors shaping religious nationalism. Although Barker acknowledges other potential pathways for religious nationalism to emerge, he argues that the combination of the two factors is a necessary condition for its formation (Barker 2009, 182). In other words, “the proximity of another religious group makes religion a useful tool for nation building. However, it is only when the seed of a threat is planted that religion is actually used for that purpose” (Barker 2009, 44). In this framework, one’s own nation is often perceived as chosen, and its territory as a holy land consecrated by the blood of ancestors martyred for faith and nation (see: Čolović 2016). This illustrates the inherent intertwining and identification of the religious and the national. Within this national-religious construction, the neighbor is both a national enemy and a heretic. It is important to emphasize that the role of religious heterogeneity in fostering religious nationalisms should be primarily understood within the regional context of historically opposed and religiously diverse states. Intrastate movements are often a reflection of regional trends; thus, the development of religious nationalism in religiously homogeneous states is often influenced by the religious diversity of their surrounding environment. The Balkans exemplify this matrix (see: Perica 2002).

Religious nationalism integrates religious and national myths. In other words, national myths are articulated through religious language and interpreted within the framework of established religious truths. National heroes become not only martyrs for the salvation and

preservation of the nation but also for the preservation of the faith that is inextricably linked to the nation (see: Čolović 2016, 39–46; Popović 2007). In this sense, religion provides a linguistic apparatus for expressing one's own national role models and aspirations (Rieffer 2003, 225). It becomes a fundamental element of national identity and, alongside language, constitutes a particular nation. In this relationship, religion serves national identity, contributing to its existence and strengthening (see: Barker 2009, 13–14; Vulić 2025, 32). It persists as a marker or symbol, irrespective of the actual commitment and practice by the majority of the population. As Barker indicates, a nation where 90% of its members regularly practice religious rites may or may not exhibit a stronger connection between religion and politics than one where only 20% engage in regular religious activities (Barker 2009, 14). In Greece, for example, only 5% of the population regularly attends church; however, as many as 98% identify Orthodoxy as an integral part of their identity (Barker 2009, 14).

RELIGION AS A BORDER MARKER OF BALKAN NATIONAL IDENTITIES

Boundary markers represent those identity features on which ethnic groups insist when emphasizing their specificity and distinctiveness (Šeflin 2015, 234). This phenomenon is particularly pronounced when different identities share a high degree of similarity. Defining national identity through these features not only establishes commonalities within a collective but also differentiates it from others, especially when national identities resemble each other (Bakić-Hayden 2006, 158). The post-Yugoslav space frequently serves as an example of the so-called “Cain and Abel syndrome” characterized by extreme intolerance between national groups despite obvious linguistic (and other) similarities (Ignatiev 2015, 314–315). Consequently, language alone was not a sufficient marker of national constitution, leading religion to become the most potent means of solidifying national identity (see: Čorbić 2023). In this regard, local nationalisms exhibit unique characteristics compared to European models. Religion, or more precisely religious communities, became key actors in promoting and articulating national culture. Although 18th-century South Slavic national movements adopted European models regarding the importance of language, they failed, due to their specific cultural and historical development, to nullify the already established

religious barriers (Ekmečić 1989, 15). Thus, the failure of the Yugoslav national project is often attributed to its belatedness, thwarted by the already formed consciousness of local communities rooted in distinct, primarily religious, foundations (Čalić 2013, 33; 413). As Ger Duijzings observes, “for centuries religion had been the main repository of identity in the Balkans and the primary source of loyalty, which could not just be pushed aside. Consequently, many Balkan nationalists realised that new forms of identity and political loyalty required the same religious component in order to be most effective” (Duijzings 1999, 159).

This development is historically conditioned. Kemal Karpat highlights that nation-building in the Ottoman Empire was largely shaped by the socio-ethnic structure and religious identity conceptualized within the millet system. This system fostered the foundations of nationality through the experiences gained within its framework (Karpat 2017, 137).¹ Based on this, Karpat identifies a fundamental difference in the emergence and nature of nation-states in Western and Southeastern Europe. In the West, nations emerge and crystallize through an emphasis on linguistic and cultural specificities to affirm the monarchical rights against ecclesiastical authority. In Southeastern Europe, however, this process was based on emphasizing religious differences in relation to Muslim rulers (Karpat 2017, 143). While acknowledging the fundamental importance of language in the construction of national identities in the Balkans, Maria Todorova posits that “it could not raze the fundamental boundary between Muslims and Christians that had been established during the centuries of Ottoman rule” (Todorova 2009, 177). This does not mean that the millet system necessarily produces Balkan nationalisms. Recognizing the fact that local nationalisms develop as a product of modernity (Malešević 2021, 212), in line with European influences, it is actually argued that the millet system gave certain contours to a process that would *later* be directed by modern Balkan states, that is, their elites and institutions, and under the great influence of church circles.

¹ Karpat understands the millet system as a socio-cultural and communitarian framework based primarily on religion, while also taking into account ethnicity and linguistic differences. This definition of millet provides a suitable framework for considering the later process of national constitution in the post-Ottoman Balkans (Karpat 2017, 139).

Consequently, the emergence and evolution of Balkan nationalisms were significantly shaped by the Ottoman experience, affecting both Christians and Muslims. While Bosnia and Herzegovina is frequently cited as an example, the processes of national constitution in Turkey and Greece also demonstrate religion as a fundamental marker of national identification (Cagaptay 2006; Katsikas 2013; Merdjanova 2013, 3). In this context, the population exchange stipulated by the 1923 Treaty of Lausanne, which implemented resettlement according to the logic of the millet system, is noteworthy (Pavlović 2018, 325). Irrespective of linguistic criteria, the exchange system included the Turkophone Anatolian Orthodox, as well as the Greek-speaking Muslim population of Crete (Pavlović 2018, 325). The millet system's influence persisted into the post-Ottoman period, particularly concerning the treatment and status of the Muslim population in the newly formed Christian-majority states (Todorova 2009, 178). The success of national projects depended (to a large extent) on the existence of autocephalous national churches (Mylonas 2019, 874). This is clearly evidenced by the case of the Bulgarian Exarchate, whose establishment in 1871 was a crucial moment in the process of national constitution (Karpat 2019, 60; Jelavich 1977, 134 cited in: Mentzel 2000, 202).² This is especially important given the Hellenizing tendencies of a segment of the Bulgarian upper middle class of that time (Karpat 2019, 60). The Bulgarian case is further illuminated by the state's approach to the Bulgarian-speaking Muslims, the Pomaks. Despite linguistic similarities, the religious component of identity impeded the full integration and assimilation of the Pomak population into the majority Bulgarian national identity. Within this context, the Bulgarian Orthodox Church's ideas regarding the *re-Christianization* of this population should be considered. This policy resulted in a part of the Pomak, Slavonic-speaking population of Bulgaria being absorbed into the larger Turkish national movement due to religious ties (Klejer i Bugarel 2020, 92). The importance of autocephalous churches in the process of building Balkan nations is also evident in the Romanian case, in which the Romanian Orthodox Church played a crucial role in defining and promoting national identity (Leustean 2007).

² The cases of Macedonia and Montenegro are illustrative, where church autocephaly was seen as one of the prerequisites for completing this process (Perica 2002, 174–175).

The aforementioned case of Bulgaria's Muslim population reveals characteristics also observed in other parts of the Balkans, where smaller, ethnically less defined Muslim groups tend to assimilate either into a larger, nationally established Muslim minority or into the dominant Christian nation of a particular state. The example of Torbeš in North Macedonia is indicative of their self-identification varying among Albanian, Muslim, Turkish, and the majority Macedonian identity. It should be noted that within these identity tendencies also include efforts to articulate a separate ethnic identity of smaller groups (Klejer i Bugarel 2020, 18; 239). Churches thus become central actors in national mobilization and integration. Their activities have national and religious dimensions, leading to the crystallization of national identities through the inseparability of these elements (Čalić 2013, 141; Perica 2002, 215–216; Duijzings 1999, 28–29). Vjekoslav Perica terms this synthesis of religious and ethnic elements in the Balkan variant of national identities “ethno-clericalism” (Perica 2002, 214). Specifically, “in societies where religious and ethnic identity and nationality are congruent and there exists a religious institution perceived as a ‘progenitor and guardian of the nation’, religious monopoly (i.e., authoritarianism) is more likely to establish and maintain itself as a ‘natural’ political order” (Perica 2002, 214). Experience demonstrates that the full consolidation of national identities in the Balkans requires the existence of a national church that gives the national movement a sacred, mythical character. These churches are among the key actors in promoting and articulating nationalist ideas, as evidenced by national myths and the broader discourse heavily influenced by dominant religions and religious heritage. Consequently, national identity (mostly) aligns with belonging to a specific church or religious community (Duijzings 1999, 28–29; Perica 2002, 215–216; Čalić 2013, 141).

Although the Albanian case does not fit into this national model today, it was not immune to the challenges of religious divisions. The slogan “‘Albanianism’ being the only true faith of the Albanians” was coined precisely to avert these differences (Duijzings 1999, 152; 152–158). In its original, initial phase, several versions of the Albanian national identity developed under a dominant religious influence, which also manifested linguistically in the choice of script (Bartl 2019, 113–116). The initiative by the renowned poet Naim Frashëri to establish Bektashism, chosen for its syncretistic character, as the national religion of Albanians, aimed precisely at ensuring national unity (Duijzings 1999,

80; 151; Klejer i Bugarel 2020, 101–102). In the context of religious heterogeneity, language became a fundamental element of the further process of national constitution (Duijzings 1999, 152–153). Namely, when considering the experience of building the Albanian nation, it is precisely the linguistic distinctiveness in relation to neighbors, that is, co-religionists, that should be taken into account as a barrier to the immersion of Albanians into culturally close identities³ (Duijzings 1999, 153). However, this does not mean that religion understood as a value-civilizational choice does not play any role in the contemporary understanding of Albanian national identity. In this context, the debates between the famous writer Ismail Kadare, who emphasizes the European and Christian character of the Albanian nation, while Rexhep Qosja insists on the Ottoman-Islamic component of the Albanian national identity, are indicative (Klejer i Bugarel 2020, 272).⁴

NATIONAL OR RELIGIOUS MYTHS?

Within this environment of interpenetration between ethnic and religious elements, Balkan nationalisms largely crystallize as a religious model. This is particularly evident in national myths, which draw their content from religious representations and traditions (see: Čorbić 2023). This is particularly evident in the post-Yugoslav space. Religious organizations, in cooperation with intellectual circles, contributed to national-building precisely by shaping national myths via celebrations, commemorations, and the canonization of national heroes. The objective is to cultivate a comprehensive culture of memory that strengthens the foundations of national identity (Perica 2002, 6). Myth, especially in

³ As is the case with the Orthodox Albanians in the south of the country in relation to their Orthodox Greek neighbors. See the history of the emigration of the Albanian Orthodox population to Greece (Bartl 2019).

⁴ However, even on the linguistic level, things were not simple. The religious division was largely accompanied by a linguistic border. Specifically, north and south of the Shkumbin River, the Gheg and Tosk dialects developed. The situation was particularly complicated by the fact that religious differences largely coincided with linguistic ones. Thus, the Orthodox and Bektashis stationed in the southern part of Albania were Tosk speakers, while Sunni Muslims and Catholics spoke the Gheg dialect. The fact that the standardization of the Albanian language would only be carried out in the early 1970s during the Hoxha regime testifies to this complexity (see: Bartl 2019).

the context observed, can therefore be understood as “an entire cultural complex, encompassing a system of stories or songs with which the material and spiritual culture of a people or an entire civilization are inextricably linked (Christian myth, Kosovo myth)” (Nedeljković 2006, 156).

Where there is no dominant overlap of ethnic and religious elements, more secular methods are resorted to in creating national myths. In the Albanian case, Skanderbeg is often portrayed primarily as a fighter against foreign invaders rather than against Muslims. Potential interpretations of Skanderbeg’s Albania as an *antemurale christianitatis* are actualized within efforts to affirm the European character of the Albanian nation (Endresen 2012, 228–232). However, even the Albanian national movement, as previously demonstrated, is not devoid of mythical iconography rooted in religious tradition. The efforts of Naim Frashëri to establish Bektashism as the national religion of the Albanians and to find motifs for expressing Albanian national suffering in the suffering of Kerbela serve as clear indicators of such tendencies (Duijzings 1999, 158–167). The following verses by Naim Frashëri from his renowned epic Qerbelaja attest to this:

“O God, for the sake of Kerbela,
for Hasan and Husayn
for the sake of the twelve Imams
who suffered as they did whilst they lived,
for all that suffering
for my deepest sadness
Do not let Albania fall nor perish.
Rather let it remain for ever and ever”
(Frashëri 1978, 288 cited in: Duijzings 1999, 167).

Of particular interest is the deployment of the aforementioned myth of the *antemurale christianitatis*, or so-called “defenders of the gates” (Kolstø 2005, 19) of Christian Europe among the Christian peoples of the Balkans.⁵ As noted in the case of the Albanian use of this myth, its purpose is to classify the group within the European-Christian

⁵ On the other hand, as a counterpart to this representation, one can cite the Bosniak version “of Bosnia as a *serhat*, or *Islamic antemurale* against the West” (Džaja 2005, 113).

civilization, thereby confirming the nation's European character. Furthermore, the concept of *antemurale christianitatis* encompasses not only the Islamic, but also the Byzantine-Orthodox world. Consequently, the use of this myth is frequently conditioned by prevailing political circumstances (Jezernik 2010, 24; Kolstø 2005, 25; Žanić 2003). The *antemurale christianitatis* is also a significant feature of the Kosovo myth, representing a struggle for the preservation of the Christian system of values and civilization (Antić 2003, 259–260). In essence: “The *antemurale* myth, then, stresses not only that the group is an integral part of the true civilization, but also that it represents *its very outpost*. As this ‘wall’ throughout history has been assailed time and again by the dark forces of the other side, the group has been chosen by divine providence to sacrifice itself in order to save the larger civilization of which it is a part. In this martyrological version the *antemurale* myth acquires messianic overtones: the nation is seen as a collective Christ that gives its life for others” (Kolstø 2005, 20).

The study of the Kosovo myth perhaps best exemplifies the phenomenon of the religious elements expressed in the national mythologizing of newly formed states. Popović reveals the structure of the Kosovo myth, identifying deep, not only Christian, but also pre-Christian motifs (Popović 2007). The myth's structure is rich with biblical narratives that give it the vitality of religious truth.⁶ As Nedeljković notes, the Croatian myth of Ban Jelačić (and his monument removed in 1947) “is shaped according to the Christian myth, as evidenced by the motif of resurrection [...]” (Nedeljković 2006, 174). He further states that many verses honoring Ban Jelačić were sung in ten-line meter and are reminiscent of the songs of the Kosovo cycle (Nedeljković 2006, 176). One of the reasons for such a striking presence of religious motifs lies in the role of church circles in the creation and promotion of the national identities of the Balkan states. Biblical elements such as martyrdom and suffering underscore the role of church circles in the articulation and shaping of the content of the Kosovo myth (Čolović 2016, 39–40).⁷ Church authorities in Croatia, through the Great Novena,

⁶ For more information on the intertwining of the mythical and the biblical, refer to Popović (2007) and Čolović (2016).

⁷ Consider the importance that Petar II Petrović Njegoš places on the Kosovo tradition (Čolović 2016, 18; 160–174).

i.e.⁸ the celebration of the anniversary of thirteen centuries of Christianity among Croats, as well as by spreading the cult of the Virgin Mary as a religious and national symbol, sought to strengthen national identity. More precisely, it could be said that they sought to emphasize the central role of Catholicism in the construction of the Croatian nation (Perica 2002, 21; 59–63; 73).

CONCLUSION

In conclusion, religious nationalism pertains to communities where religion constitutes a fundamental component of national identity. In contexts such as the post-Yugoslav space, characterized by linguistic similarity, religion serves to delineate cultural boundaries between “us” and “them.” While religious motifs and symbols are present in this ethnic model, the fundamental importance of religion in establishing these communal boundaries renders religious nationalism distinct. Religion and nationality are thus inextricably linked. Religious communities, acting as interpreters of the national idea, promote a version of nationalism deeply infused with religious influences. They consequently position themselves as simultaneously and inseparably religious and national actors, addressing a community of believers that is primarily national.

This framework offers a pertinent explanation for the Balkan experience. As demonstrated, the borders of the newly formed nations were drawn in accordance with the religious affiliation of their members, more precisely, with the administrative jurisdiction of the national churches. Although the Albanian national project may be considered an exception, other Balkan nationalisms have generally favored and remained aligned with the dominant religious community. This is further evidenced by national myths, which are deeply rooted in church traditions. By emphasizing religious motifs, mythologemes aim to depict the rootedness in a specific spiritual milieu from which it derives its fundamental values. Such national iconography further solidified the demarcation between members and non-members of the nation, thereby

⁸ This jubilee celebrates thirteen centuries since Croatia adopted Christianity, as interpreted by the church to have occurred in 641. The celebration was interrupted by the beginning of World War II and the collapse of the Kingdom of Yugoslavia (Perica 2002, 21).

impeding the integration of religious minorities into the majority national community.

Based on the foregoing, religion is clearly an indispensable factor in understanding the nature of local nationalisms. Its influence on the process of national constitution must be examined in conjunction with specific historical developments, particularly the role of religious communities during the Ottoman period. Having endured the collapse of medieval Christian states, the church served as the custodian of historical memory, especially of Orthodox peoples within the Ottoman Empire. However, religion's role is evident not only in historical development and national myths but also in current trends. Consequently, religious communities can be characterized, if not as the most significant, then certainly among the most significant subjects in affirming national identity in this region.

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РЕЛИГИЈСКИ НАЦИОНАЛИЗАМ: БАЛКАНСКО ИСКУСТВО**

Резиме

Предмет овог рада је анализа улоге религије у процесу конституисања балканских национализама. Полази се од претпоставке да је религија била кључни фактор у исцртавању идентитетских граница. Тиме се не занемарује утицај језика, нарочито ако се има у виду албански случај. Балкански национализми су у свом развоју били под утицајем европских идеја што је важно имати у виду приликом овог разматрања. Ипак, код већине балканских нација религија је послужила као главни елемент/граничник у процесу националне конституције. У том контексту је веома значајно османско наслеђе и утицај милет система. Наиме, у раду се религијски фундаменти балканских националних пројеката доводе у везу са османским искуством унутар којег је фаворизована идентификација становништва по верским критеријумима. То не значи да су балкански национализми проистекли искључиво из милет система, већ сугерише на утицај тог искуства на сам процес. Отуда је ова анализа заснована на поставкама историјског институционализма услед чега се религијски национализам на Балкану може сагледавати као производ специфичног историјског развоја. О улози и значају религијске компоненте унутар балканских националних покрета сведоче и национални митови засновани на црквеним, односно верским предањима. На тај начин се додатно ојачавала граница између верских групација упркос језичким сличностима о чему сведочи и постјугословенски простор. Дакле, у оквиру језички сродних друштава расте значај религије као националног маркера. Из тога произилази и важна улога верских заједница као актера

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у процесу изградње и јачања националних пројеката на овом простору.

Кључне речи: религијски национализам, Балкан, митови, милет систем, национални идентитет

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SECURITY CHALLENGES AND GLOBAL RISKS

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Review article

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CORRELATIONS BETWEEN GLOBAL PROBLEMS AND SECURITY

Abstract

The fact that there are regions of prolonged conflicts, that is, states engaged in continuous armed conflicts, served as the basis for defining the problem addressed in this paper. The question arises as to what causes these conflicts, namely, whether there are common characteristics among states that are not resilient to contemporary security threats? Which global changes have contributed to the development of conflicts, and which states are prone to conflict? The aim of the research is to identify, through an analysis of the major global problems faced by states at war, the common characteristics (common denominators) that place

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these states in conditions of prolonged conflict. The research is based on the sectoral approach of the Copenhagen School of Security Studies, which examines threats to security through different sectors (military, political, economic, environmental, and societal).

Keywords: armed conflicts, protracted conflicts, global problems, security threats

INTRODUCTION

According to data from World Population Review: Countries Currently at War, there were 36 active armed conflicts in the world during 2025, in which 38 states were directly involved (World Population Review [WPR], 2025).¹ The Global Peace Index emphasizes that conflicts are also becoming increasingly internationalized, with 92 countries now indirectly or directly involved in conflicts beyond their own borders (Institute for Economics & Peace [IEP] 2024). This means that more than 60% of existing countries are involved in wars or conflicts. Countries exposed to prolonged conflicts can become war-torn states that require many decades to rebuild their infrastructure, economies, and other essential functions (WPR, 2025). Due to war devastation, these so-called collapsed states are characterized by large-scale migration, especially of young, working-age populations. Such countries remain for decades “occupied” by various military, police, and political missions, which most often fail to establish a high level of democracy, economic development, or stable social cohesion.

Representatives of the Copenhagen School argue that the logic of security should be expanded beyond the defense of territory, national interests, and nuclear deterrence to include “universal problems” and conflict prevention, as well as, crucially, joint global efforts to eradicate poverty and underdevelopment (Mišev 2022, 49). In recent decades, there has been an increasing number of scientific contributions mapping all security challenges, risks, and threats at the global level, whose harmful impacts are expected to leave major consequences for humanity. Today, security threats cannot be interpreted solely through military dimensions,

¹ The presented data include estimates from two prominent sources: the Uppsala Conflict Data Program (UCDP) and the Armed Conflict Location & Event Data Project (ACLED), used for analysis and comparison (WPR, 2025).

but rather as multiple, asymmetric, and transnational threats, ranging from biological and chemical weapons, environmental degradation, and information-technology threats, to nuclear catastrophes (Mišev 2022, 49). All of these security threats have the same ultimate consequence: armed conflict. War as a method of projecting power beyond national borders, achieving specific goals, and pursuing economic and political interests has not been eliminated. The causes of conflicts have to some extent changed, security threats have multiplied and become more complex, uncertain, and unpredictable, but the outcome of these threats has not changed, as they still tend to culminate in armed conflicts. Therefore, conflict prevention and the resolution of disputes in their latent phase are of crucial importance for maintaining peace. In this sense, it is necessary to map both contemporary security threats and the states themselves, along with their military, political, economic, and social structures, in order to objectively assess security conditions and the potential for destabilization and escalation of conflicts.

During the period after World War II, from 1945 to 2018, 162 wars were recorded. Out of these, 93 conflicts occurred during the Cold War period (1945-1990), and 69 conflicts took place from 1990 to 2018 (Jeftić i dr. 2018, 27). With the end of the Cold War, armed conflicts have partially decreased worldwide. However, since 2003, armed conflicts have sharply increased, especially in countries with Muslim-majority populations (Mišev 2022, 53). With the fall of the Berlin Wall, Western countries achieved global dominance, which led to an increase in civil wars, the emergence of non-conventional forms of warfare (such as terrorism and cyberattacks), and numerous unresolved conflicts. When viewed in terms of conflict resolution since the fall of the Berlin Wall, out of a total of 69 conflicts, 30 remain unresolved (including Syria, Iraq, Ukraine, Yemen, Nigeria, Chad, etc.), which is approximately 45% (Jeftić i dr. 2018, 45).

CORRELATION BETWEEN GLOBAL PROBLEMS AND SECURITY

Professor Richard Smalley, a Nobel Prize winner in Chemistry, identified the 10 greatest problems facing the world (Mišev 2022, 50):

1. energy,
2. water,
3. food,

4. environment,
5. poverty,
6. diseases,
7. terrorism and war,
8. education,
9. democracy and
10. population (Smalley 2005, 414).

When viewed through the sectoral approach of the Copenhagen School, all ten global problems fit into the military sector (terrorism and war), the political sector (democracy), the environmental sector (environment, water, food, energy), the economic sector (poverty and diseases), and the societal sector (population and education) (Mišev 2022, 50). To these globalized threats, the challenges of the fourth digital revolution should also be added, namely, internet-based threats (Diagram 1). Of course, global threats cannot be viewed in isolation; conflicts are generally not caused by a single specific security threat (for example, climate change), but rather by an interplay of different factors (such as the inability of institutional responses to environmental degradation, as a consequence of unstable political authority, poor economic development, and/or extreme religious and ethnic phenomena within society).

Diagram 1. Global Problems through a Sectoral Approach



Source: Mišev 2022, 51.

Correlation between population size, number of states, and conflicts

Contemporary statistics indicate a growing population over a 50-year period, during which the global population increased from less than 3.5 billion in 1960 to almost 6.5 billion in 2010, nearly doubling (Kovačević i Kovačević 2016, 66). According to estimates by the United Nations Department of Economic and Social Affairs (UN DESA), demographic projections indicate that the global population will increase from the current seven billion to 8.6 billion by 2030, 9.8 billion by 2050, and 11.2 billion by 2100, with the largest growth expected in underdeveloped, low-income countries in Asia and Africa (Department of Economic and Social Affairs Population Division [DESAPD], 2017). It is expected that half of the world's population growth will be concentrated in nine countries: India, Nigeria, the Democratic Republic of the Congo, Pakistan, Ethiopia, Tanzania, the United States, Uganda, and Indonesia (DESAPD, 2017). It is precisely these countries, including the United States with its internal issues, that are characterized by political and social instability as well as frequent and prolonged conflicts.

Looking at history, it is clear that the previous population growth coincided with an increase in the number of modern states, a process known as state fragmentation. According to data from the Global Report on Conflict, Governance, and State Fragility 2017, published by the *Center for Systemic Peace*, “the number of independent states with more than 500,000 inhabitants increased from 22 in 1800 to 54 in 1900, and then tripled during the 20th century, reaching 167 states in 2017” (Marshall and Elzinga-Marshall 2017, 2). With the collapse of the socialist state system and the dissolution of the Soviet Union (USSR), the Socialist Federal Republic of Yugoslavia (SFRY), and Czechoslovakia, the number of states increased by 22. Today, the world has 193 states that are members of the United Nations (Mišev 2022, 53).

“During the Cold War period (1946–1991), the number and scale of armed conflicts in the global system were relatively evenly distributed across the world, although they were concentrated in six ‘prolonged conflict regions’ (Central America, Southern Africa, the Middle East, South Asia, Southeast Asia, and the Korean Peninsula)” (Marshall and Elzinga-Marshall 2017, 11). The creation of independent states from former colonial territories in Asia, Africa, and Central and

South America has led to decades-long conflicts over various forms of independence or power struggles, resulting in nearly 20% of unresolved conflicts from the period before the fall of the Berlin Wall. A similar pattern can be observed in the fragmentation of former socialist states (the Union of Soviet Socialist Republics and the Socialist Federal Republic of Yugoslavia), which can be described as “frozen” (rather than resolved) conflicts. “Before the collapse of socialism, internal wars accounted for 59% of conflicts, whereas after the collapse of socialism and the end of bipolarity, this share increased to as much as 88%” (Jeftić i dr. 2018, 27). These wars are characterized by the engagement of the entire international community, that is, external interference in internal conflicts. The interaction between internal tensions and external pressures partly explains the inability of many new autocracies to effectively manage internal conflicts (Marshall and Elzinga-Marshall 2017, 14). The changes brought by globalization require a new approach to security (Mišev 2022, 6). Geopolitical competition among global centers of power has become part of a complex, systemic, and contradictory process of globalization that shapes the contemporary international system. On the one hand, globalization is a process of creating a unified global identity (a transnational liberal system), while on the other hand, it is a process of state fragmentation. In this sense, what is today referred to as globalization is a contradictory process (Mišev 2025, 20).

Correlation between democracy and conflict

The Democracy Index is based on five categories: (1) electoral process and pluralism, (2) functioning of government, (3) political participation, (4) political culture, and (5) civil liberties. Based on their scores across a range of indicators within these categories, each country is classified into one of four regime types: “full democracy,” “flawed democracy,” “hybrid regime,” or “authoritarian regime” (Economist Intelligence Unit [EIU], 2025). The fragmentation of states and the creation of new independent countries, which emerged during “the second and third waves of decolonization,” were almost always authoritarian or quickly fell under authoritarian rule (within ten years) (Marshall and Elzinga-Marshall 2017, 5). The emergence of new states during this period showed that these regimes were not sufficiently integrated to sustain and consolidate democratic procedures, which is why autocracies developed as inherently unstable regimes. “This helps

explain the near doubling of authoritarian regimes with the end of the Cold War and their apparent persistence during the first two decades of the 21st century” (Marshall and Elzinga-Marshall 2017, 6).

According to data from the *The Economist Intelligence Unit: What’s wrong with representative democracy?* presented in the Democracy Index, as shown in Table 1, out of 167 countries in 2024, 35.9% are authoritarian regimes (60 countries), 27.5% are flawed democracies (46 countries), 21.6% are hybrid regimes (36 countries), while full democracies are the least numerous (25 countries, or 15%). This overview is presented in Table 1 (EIU, 2025). It is also important that approximately 39.2% of the world’s population lives in authoritarian states. More precisely, less than half (45%) of the global population lives in some form of democracy, while a much smaller share (6.6%) lives in “full democracies,” which represents a decline compared to 12.5% in 2014 (EIU, 2025). The number of countries classified as some form of democracy has decreased by eight, from 79 in 2006 to 71 today. Consequently, the number of “authoritarian regimes” has increased from 55 in 2006 to 60 (EIU, 2025).

Table 1. Distribution of Countries by Regime Type

REGIME TYPE	NUMBER OF STATES	% STATE	% POPULATION
Full democracies	25	15	6,6
Flawed democracies	46	27,5	38,4
Hybrid regimes	36	21,6	15,7
Authoritarian regimes	60	35,9	39,2

Source: EIU, 2025.

Eastern Europe, the Middle East, and North Africa have no full democracies, unlike most countries in Western Europe. The most concerning situation is in Sub-Saharan Africa, where out of 44 countries, more than half (23) are authoritarian regimes, as well as in the *Middle East and North Africa* (MENA), where out of 20 countries, as many as 17 are authoritarian states, and there are no full democracies at all (EIU, 2025). On the other hand, Eastern Europe and Latin America, with a large number of flawed democratic regimes, are still in a transitional period in which they have not managed to reach the level of full democracy seen in developed Western countries, nor their level of security. Even

some Eastern European states (Bulgaria, Romania) have joined both the NATO alliance and the European Union, despite not being “full democracies” (Mišev 2022, 57).

This indicates that the strengthening of a political oligarchy leads to the weakening of institutions, which are unable to ensure the proper functioning of the system, including security. As a result, such states become weak, that is, destabilized by civil discontent and political protests, which often escalate into armed conflicts. The problem arises when the political elite is focused on preserving power rather than the state itself. In this regard, Collins distinguishes between two types of security in weak states:

- Regime security – a condition in which ruling elites are safe from violent challenges and threats to their rule.

- State security – a condition in which state institutions, processes, and structures are able to continue functioning effectively regardless of changes in the ruling elite (Collins 2010, 166). A large number of leaders in weak states have successfully carried out a transition to multi-party democracy while maintaining control over the state (Collins 2010, 177). In this sense, an authoritarian party oligarchy is a major obstacle to strengthening the democratic institutions of the state system, which are the foundation not only of the functioning of the state as a political, social, and economic community, but also of the entire security system.

Correlation of Natural Resources (Water and Food), Environmental Degradation, Energy and Conflicts

The industrial, followed by the technological, and today the digital revolution, together with globalization, have improved the quality of life in industrialized countries, but have also left enormous damage to the environment and natural resources. Unfortunately, the greatest consequences of environmental disasters are borne by developing and underdeveloped countries, which lack the capacity to address environmental problems that they, in fact, did not cause (Mišev 2022, 58). The Middle East and North Africa region, which includes over 355 million people, has been the subject of numerous studies on the effects of climate change (Grossman 2017, 1). What is concerning is that these are regions comprising countries with low levels of economic development (so-called poor countries), which lack sufficient resources to effectively combat environmental degradation and are additionally destabilized by

political conflicts (Mišev 2019, 305). According to UNDP data, as many as 887 million people worldwide are directly exposed to climate hazards such as extreme heat, floods, droughts, or air pollution. "Individually, the most widespread hazards affecting poor people globally are high temperatures (608 million) and air pollution (577 million). Flood-prone regions are home to 465 million poor people, while 207 million live in areas affected by drought" (United Nations Development Programme [UNDP], 2025). Professor Smalley spoke about billions of people around the world who live without reliable access to clean water for drinking and agriculture. He expressed concern that, as population growth continues and existing natural resources are depleted, the biggest problem will be water scarcity. According to a United Nations report, more than 780 million people worldwide do not have access to safe drinking water. By 2030, 47% of the world's population is expected to live in water-stressed areas, according to a report by the *Organisation for Economic Co-operation and Development* (Jeftić i dr. 2018, 26). Canadian scientist Thomas Homer-Dixon argues that environmental degradation "is already contributing to violent conflicts in many parts of the developing world." Poor societies are particularly affected because they are less capable of defending themselves against environmental degradation and its resulting social crises (Homer-Dixon 1994, 6). Numerous studies also indicate that countries affected by conflict and already exposed to environmental degradation (such as water scarcity and a lack of fertile land) are at the highest risk of experiencing an increase in conflicts and violence due to global climate change (Mišev 2022). Some domestic authors argue that there are also other factors that can negatively influence the spread of environmental problems and even generate them, including population growth, poverty, hunger, and pandemic diseases (Jovanović Popović i Milinčić 2016, 69–82).

Environmental degradation, strongly influenced by the exploitation of energy resources (fossil fuels), has serious consequences for human health, poverty, and economic development, as well as strategic importance for states whose power is based on natural resources such as coal, oil, and gas, and can therefore become a source of conflict. These changes are often accompanied by dangerous or harmful (external and/or internal) economic and political events or circumstances that, by their occurrence, can escalate into crises, such as oil shocks, gas crises, etc. (Mišev 2020, 149). The importance of this topic lies precisely in the fact that the energy security of every state is an extremely important

component of its economic situation, since energy is the foundation for the necessary and continuous functioning of all branches of industry and services in the modern world (Chernyak, Kharlamova, and Stavvytskyy 2018, 5). Ownership and transit of energy resources can be a source of social and economic development, but also of systemic imbalance, leading to tensions in international relations (Mišev 2020, 149). Due to “large reserves of natural gas and oil, the regions of Central Asia and the Middle East have become geopolitically important areas, where the interests of major powers collide over the control of energy resources.” As a result, countries in the Middle East (Iraq, Iran, Syria, Israel), former Soviet Union states (Ukraine, Georgia, Azerbaijan, etc.), as well as parts of Africa (Libya, Nigeria, South Sudan) and South America (Venezuela) have been drawn into energy-related conflicts. “The conflict between Israel and Iran represents one of the most persistent confrontations in the Middle East. Over the past decade, its dynamics have increasingly become multidimensional, reflected in the spillover of conflict beyond traditional military-political frameworks” (Bogićević 2026, 171). Eurasia is home to 75% of the world’s population, accounts for 60% of global gross national product, and contains 75% of global energy resources as well as half of the world’s nuclear power (Mišev 2020, 156). The issue of nuclear weapons proliferation represents a significant challenge to international and regional security. This is particularly evident in the Middle East, one of the key regions in world politics (Pajić 2025, 350). Smalley argues that democracy declines without an educated population, which, together with resource scarcity and rising poverty, often leads to conflicts and terrorism as increasingly transnational and asymmetric threats to security. Although addressing these security challenges will not immediately bring peace to the Earth, it helps remove some of the factors that contribute to the development of global conflicts and unrest (Smalley 2005, 414–417).

Correlation between Poverty, Diseases, Education, and Conflicts

Conflicts between states are becoming less frequent, while conflicts among social groups within states are becoming more common. Differences in social and educational status are increasingly becoming a barrier to social cohesion and integration (Mišev 2022, 267). Estimates suggest that the number of people living in absolute

poverty is 887 million in 2025 (UNDP, 2025). This means that a huge number of people still suffer from poverty and hunger. The World Food Programme currently estimates that “as many as 343 million people are facing acute levels of food insecurity” (World Food Programme [WFP], n.d.). Conflicts increase the number of hungry people, while climate shocks – droughts, floods, and storms – worsen the crisis. As many as 69% of people with acute food insecurity, 219 million, live in fragile or conflict-affected countries (WFP, n.d.). There is clear empirical evidence of a vicious cycle in which underdevelopment is a key driver of conflict, and in turn, conflict generates enormous development costs. In other words, conflict helps sustain poverty due to the destructive nature of war, creating a vicious poverty-conflict-poverty cycle (Murshed and Tadjoeddin 2009, 88). Poverty is fertile ground for the emergence of religious fanatics and extremist groups that do not hesitate to use all means of intimidation and fear, which creates favorable conditions for the development of terrorism. In this sense, poverty represents a greater threat to security than any other category of security challenges, risks, and threats (Mišev 2022, 267).

Education plays a key role in alleviating poverty, while poverty and hunger simultaneously represent major obstacles to effectively utilizing educational opportunities. Every fourth person on the planet, more than 1.5 billion people, lives in fragile states affected by conflict or in countries with very high levels of crime (violence) (United Nations Educational, Scientific and Cultural Organization [UNESCO] 2014, 332). Around 40% of children who do not attend school live in conflict-affected countries, and armed conflict is a major obstacle to achieving global peace goals. At the same time, education plays a key role in „promoting the knowledge, skills, attitudes, and values needed to bring about behavioral change that can enable children, young people, and adults to avoid and prevent conflict and violence“ (UNESCO 2014, 332). The mildest form of social dissatisfaction results in population migration in search of better living conditions, which is why it is not surprising that, according to a report by the *International Organization for Migration*, the Middle East and the Horn of Africa were the regions with the highest increase in the number of refugees worldwide (International Organization for Migration [IOM], 65–78). Social stratification deepens the gap that culminates first in social, and then in political dissatisfaction and unrest, from which social conflicts emerge. The “global economy has created a phenomenon that can accurately be

described as the globalization of insecurity,” first by generating conflict and thereby destabilizing peoples and communities, and second by escalating poverty, disease, and deprivation (Ahmed 2004, 113).

According to data from the *World Health Organization*, half of all deaths are caused by non-communicable diseases, while the other half is made up of infectious diseases, which are typical of poor countries. The risk of dying from infectious diseases (HIV, tuberculosis, malaria, hepatitis, and tropical diseases) is highest in the African region and Southeast Asia, as well as in low- and lower-middle-income countries. Poor air quality “is associated with an increased risk of stroke, heart disease, lung cancer, and chronic and acute respiratory diseases,” and is linked to developed urban environments. It is estimated that globally, 9 out of 10 people living in urban areas are exposed to PM_{2.5} air pollution (i.e., particles with a diameter of 2.5 micrometers) above the annual average level. “Household and ambient air pollution together were responsible for 7 million deaths in 2016” (World Health Organization [WHO] 2021, 1). “In 2017, 71% of the global population (5.3 billion people) used safely managed drinking water services, while only 45% (3.4 billion people) had access to safely managed sanitation services.” Globally, in 2016, unsafe drinking water, inadequate sanitation, and poor hygiene caused nearly 0.9 million deaths, including over 470,000 deaths of children under the age of five due to diarrhea (WHO 2021, 43). This means that more than “2 billion people do not have reliable access to safe drinking water, and 3 billion lack basic sanitation” and hygiene services. Water scarcity leads to food shortages, higher rates of disease, and the development of extremist social groups. A concerning estimate suggests that between 2.3 and 3.5 billion people lack full access to basic health and sanitation services. This implies that roughly half of the world’s “7.3 billion population does not receive the basic healthcare services they need.” According to the World Health Organization, in 2019, one-quarter of health facilities lacked basic water services, meaning that 1.8 billion people, including healthcare workers and patients, were exposed to a higher risk of infections (WHO 2021, 43).

Correlation between Security and Terrorism

In recent years, the nature of warfare has no longer been directed toward the direct and exclusive destruction of the enemy, where the primary targets are opposing armed forces, but instead civilians and

civilian infrastructure have increasingly become the main targets rather than military ones (Jeftić i dr. 2018, 36). Some of the greatest threats come from terrorist groups such as the Tamil Tigers in Sri Lanka, Boko Haram in Nigeria, Al-Qaeda in Iraq and Syria, the Taliban in Afghanistan, etc. (Mišev 2022, 279). Weak states, usually governed by authoritarian political elites, have proven incapable of solving ongoing problems and creating conditions for the normal functioning of the state system, and consequently of an economically and politically organized society. When states are weak or underdeveloped, certain groups within them feel compelled to ensure their own defense. "If the state in question is very weak or is expected to weaken over time, incentives increase for groups to undertake independent military preparations" (Keković i Dimitrijević 2017, 319).

Poverty is fertile ground for the development of ideologies promoted by terrorist organizations. Lower social classes often lack access to education, emancipation, and social mobility; healthcare services are largely unavailable to them or are of low quality, as are educational institutions. As a result, social awareness remains at a low level, along with "primitivism" as a cultural enigma. Because of all this, they are often left with only extreme nationalism, religious intolerance, the struggle for a so-called "holy state," and the glorification of a distorted form. The lack of social and political cohesion enables terrorist groups to take on the role not only of the state but also of a supranational organization, whose legitimacy is based on a just struggle for certain, most often religious or ideological goals. The identity of the group is stronger than the identity of the state or nation (Mišev 2022, 280). By promoting the creation of, for example, a "greater Islamic state," terrorist organizations give legitimacy to their struggles as just and necessary for the preservation of religious, ethnic, and national interests, and for the fight against the "evil" brought by the Western world (Mišev 2022, 280).

Internet (cyber) threats and security

The influence that media owners have today, through the internet and television, represents one of the most dangerous tools for spreading political, economic, and cultural paradigms and for shaping social reality, which can be harmful both to society and to the state as a whole (Mišev 2022, 283). The internet, as the most modern form of communication and especially widespread among young people, is one

of the main elements of psychological warfare and the dissemination of various types of information and disinformation. Cyber threats have become part of modern weaponry at all levels.

The focus of cybersecurity is the protection of critical national infrastructure from cyberattacks through information networks. All parts of key infrastructure, transportation, energy production and distribution, water supply, law enforcement, the military, public administration, etc., which form the foundation of the functioning of the state and society, can be endangered, which is why a serious approach to the field of cybersecurity is necessary. The technological capability to connect an increasing number of networks, human networks, and networks of things on the internet, which is (as a network) already burdened with many security issues, raises the question of ensuring the personal and material security of individuals, companies, and the state (Stevanović i Đurđević 2016, 113). Cyberattacks have become a powerful, low-cost warfare option that damages the targeted side simply by clicking a button. A cyberattack serves as an asymmetric weapon, whose attacks are difficult to predict and which enable inferior groups and states to inflict damage on technologically and militarily superior enemies (Mišev 2022, 285). Weak and poor states under the pressure of globalization are conditioned by digitalization and the introduction of technological innovations, for which they do not have the necessary material or human (educational) resources. Such states are particularly vulnerable to cyberattacks because they do not have a developed security IT infrastructure.

STATES IN CONFLICT AND GLOBAL ISSUES

When carefully analyzing these reports and making a comparison of countries that are in conflict, it can be concluded that all of these states, according to the sectoral approach of the Copenhagen School of Security, belong to the group of high-risk security states. Out of 38 states, armed conflicts take place in 23 authoritarian states, 12 hybrid regimes, 2 flawed democracies, and 1 full democracy (Israel). Of these, 8 are repressed, and 17 are economically unfree. This means that 25 states do not have free market conditions that enable the development of entrepreneurship. Out of 38 states, 27 are classified as fragile states, and as many as 11 are in some form of crisis (ranging from moderate to high alert). This overview is presented in Table 2.

The above indicates that these states are characterized by both political and social instability, as well as economic and environmental underdevelopment, including in terms of modern technological development.

Table 2. States and Types of Conflict

No	Countries and Types of Conflict	Demo- cracy Index 167 states	Eco- nomic Index 175 states	Stability Index 178 states	Environ- mental Index 180 states	Human Deve- lopment Index (HDI) 193 states
1	Terrorist insurgency in Iraq / Political unrest	Author- itarian 126	/	Unstable 148	Very low 172	Medium low 128
2	Terrorist insurgency in Nigeria	Hybrid 106	Mostly unfree 125	Unstable 164	Low 140	Very low 161
3	Terrorist insurgency in DR Congo	Author- itarian 156	Re- pressed 160	Very unstable 174	Low 128	Very low 180
4	Terrorist insurgency in Tanzania	Hybrid 86	Mode- rately free 86	Mod- erately warning 117	Medium 102	Very low 167
5	Terrorist insurgency in Uganda	Hybrid 98	Mostly unfree 140	Unstable 151	Very low 154	Medium low 159
6	Terrorist insurgency in Algeria	Author- itarian 110	Re- pressed 164	Warning 92	Low 114	Deve- loped 93
7	Terrorist insurgency in Morocco	Hybrid 91	Mostly unfree 101	Warning 95	Medium 74	Medium low 120
8	Terrorist insurgency in Ghana	Flawed demo- cracy 65	Mostly unfree 104	Warning 73	Low 119	Medium low 145

No	Countries and Types of Conflict	Democracy Index 167 states	Economic Index 175 states	Stability Index 178 states	Environmental Index 180 states	Human Development Index (HDI) 193 states
9	Terrorist insurgency in the Ivory Coast	Hybrid 105	Mostly unfree 91	Unstable 140	Medium 104	Very low 166
10	Terrorist insurgency in Cameroon	Authoritarian 136	Mostly unfree 121	Unstable 159	Low 136	Medium low 151
11	Terrorist insurgency in Niger	Authoritarian 141	Mostly unfree 128	Unstable 160	Low 125	Very low 189
12	Terrorist insurgency in Mali	Authoritarian 139	Mostly unfree 127	Unstable 165	Very low 160	Very low 188
13	Terrorist insurgency in Burkina Faso	Authoritarian 137	Mostly unfree 134	Unstable 158	Low 110	Very low 185
14	Terrorist insurgency in Chad	Authoritarian 158	Mostly unfree 136	Very unstable 169	Very low 153	Very low 189
15	Terrorist insurgency in Benin	Hybrid 100	Mostly unfree 95	Mod-erately warning 105	Low 141	Very low 173
16	Terrorist insurgency in Tunisia	Hybrid 93	Re-pressed 150	Warning 87	Medium 91	Deve-loped 101
17	Terrorist insurgency in Togo	Authoritarian 121	Mostly unfree 139	Unstable 128	Very low 155	Very low 163
18	Terrorist insurgency in Libya	Authoritarian 140	/	Unstable 163	Low 126	Deve-loped 92
19	Terrorist insurgency in Mauritania	Hybrid 108	Mostly unfree 110	Highly warning 145	Very low 159	Very low 164

No	Countries and Types of Conflict	Democracy Index 167 states	Economic Index 175 states	Stability Index 178 states	Environmental Index 180 states	Human Development Index (HDI) 193 states
20	Russia – Russo-Ukrainian War	Authoritarian 150	Mostly unfree 131	Unstable 131	Medium 83	Very developed 52
21	Ukraine – Russo-Ukrainian War	Hybrid 92	/	Unstable 157	High 41	Developed 100
22	Israel – Israeli-Palestinian War	Full democracy 31	Modestly free 26	Stable 50	High 52	Very high 25
23	Palestine – Israeli-Palestinian War	Authoritarian 112	/	Unstable 166	/	Developed 111
24	South Sudan – Ethnic violence	Authoritarian 162	/	Very unstable 176	/	Very low 192
25	War on drugs in Mexico	Hybrid 84	Modestly free 68	Warning 96	Medium 97	Developed 77
26	Civil war in Afghanistan / Terrorist insurgency	Authoritarian 167	/	Very unstable 171	Very low 171	Very low 182
27	Civil war in Haiti / Gang war	Authoritarian 131	Repressed 155	Very unstable 170	Low 141	Medium low 158
28	Civil war in Colombia / War on drugs	Flawed democracy 60	Mostly unfree 84	Modestly warning 116	High 63	/
29	Civil war in Bangladesh	Hybrid 100	Mostly unfree 116	Unstable 142	Very low 175	Medium low 129

No	Countries and Types of Conflict	Democracy Index 167 states	Economic Index 175 states	Stability Index 178 states	Environmental Index 180 states	Human Development Index (HDI) 193 states
30	Civil war in Ethiopia	Authoritarian 116	Repressed 156	Unstable 167	Low 140	Very low 176
31	Civil war in Myanmar	Authoritarian 166	/	Unstable 168	Very low 177	Medium low 144
32	Civil war in Sudan	Authoritarian 162	Repressed 173	Very unstable 177	Low 131	Very low 170
33	Civil war in Yemen	Authoritarian 155	/	Very unstable 173	/	Very low 186
34	Civil war in Mozambique	Authoritarian 113	Mostly unfree 141	Unstable 154	Low 132	Very low 183
35	Civil war in Syria	Authoritarian 163	/	Very unstable 175	/	Medium low 157
36	Civil war in Ecuador	Hybrid 85	/	Warning 89	/	/
37	Civil war in the Central African Republic	Authoritarian 164	Repressed 168	Very unstable 172	Low 132	Very low 191
38	Afghanistan–Pakistan border conflict	Authoritarian 124	Repressed 147	Unstable 152	Very low 179	Very low 164

Source: WPR, 2025.

The authors of this paper have identified criteria that could determine the main factors of instability leading to conflict, i.e., that increase the likelihood of conflict occurring. This overview is presented in Table 3. As shown in Table 3, countries in conflict, or those with a higher probability of being drawn into armed conflict, meet the following criterion values:

1. SDI less than 150 billion USD (all states) (World Bank [WB] 2025);
2. Gross domestic product below 250 billion USD (all except 9 states) (International Monetary Fund [IMF] 2025);
3. Income per capita lower than 40,000 USD per capita (all except Israel), and with a much higher likelihood if they have a GDP per capita below the global average of 13,000 USD per capita (all except 3 countries: Israel, Russia, and Mexico) (World Bank Group [WBG] 2025);
4. At least one of the top 50 or top 100 largest companies/banks in the world does not operate in its territory (Fortune, 2026; Global Marketcap Ranking [GMR] 2026);
5. They have significant reserves of oil, gas, or materials that will be needed in the future (28) (Worldometer 2025);
6. They are located on major maritime transport routes (Zahra 2025), along major gas and oil pipeline routes (9 states) (Planete Energies [Energies] 2025);
7. Large or potentially large food producers (11 states) (World Bank Group [WBG] 2024);
8. They have a surplus of water (15 states) (WBG 2024);
9. Weakly developed cyber defense (almost all except 3: Israel, Russia, and Ukraine) (IMD World Competitiveness Center [IMD WCC] 2025).

Table 3. Criteria for the likelihood of conflict outbreak

No.	Countries and Types of Conflict	FDI WB (Million USD)	GDP IMF (Billion USD)	GDP per Capita	Energy & Minerals	Transport & Energy Routes	Food Producers	Water Resources	Cyber Security
1	Terrorist insurgency in Iraq	-7,458.30	278.771	6,073.6	YES	YES	NO	NO	NO
2	Terrorist insurgency in Nigeria	1,080.31	252.109	806.9	YES	NO	NO	YES	NO
3	Terrorist insurgency in DR Congo	2,915.06	74.498	647.4	YES	NO	NO	YES	NO
4	Terrorist insurgency in Tanzania	1,717.58	79.236	1,185.7	YES	NO	YES	YES	NO
5	Terrorist insurgency in Uganda	3,304.90	56.232	1,072.7	YES	NO	YES	YES	NO
6	Terrorist insurgency in Algeria	1,226.41	269.140	5,631.2	YES	NO	YES	NO	NO
7	Terrorist insurgency in Morocco	1,639.00	160.606	3,993.4	YES	YES	YES	NO	NO
8	Terrorist insurgency in Ghana	1,765.55	82.825	2,405.8	YES	NO	YES	YES	NO
9	Terrorist insurgency in the Ivory Coast	3,802.12	87.096	2,709.9	YES	NO	YES	YES	NO
10	Terrorist insurgency in Cameroon	925.28	54.394	1,762.4	YES	NO	NO	YES	NO
11	Terrorist insurgency in Niger	526.45	19.866	722.7	YES	NO	NO	NO	NO

No.	Countries and Types of Conflict	FDI WB (Million USD)	GDP IMF (Billion USD)	GDP per Capita	Energy & Minerals	Transport & Energy Routes	Food Producers	Water Resources	Cyber Security
12	Terrorist insurgency in Mali	708.59	22.789	1,086.2	NO	NO	NO	NO	NO
13	Terrorist insurgency in Burkina Faso	82.94	23.130	987.3	NO	NO	NO	NO	NO
14	Terrorist insurgency in Chad	1,019.49	19.836	1,016.1	YES	NO	NO	NO	NO
15	Terrorist insurgency in Benin	543.01	21.487	1,485.4	NO	NO	NO	NO	NO
16	Terrorist insurgency in Tunisia	759.60	52.925	4,350.4	YES	NO	NO	NO	NO
17	Terrorist insurgency in Togo	83.75	9.776	1,043.1	YES	NO	NO	NO	NO
18	Terrorist insurgency in Libya	794.70	48.363	6,318.4	YES	NO	NO	NO	NO
19	Terrorist insurgency in Mauritania	1,440.29	11.003	2,082.8	YES	NO	NO	NO	NO
20	Russia – Russo-Ukrainian War	-8,102.28	2,173.225	14,889.0	YES	YES	YES	YES	YES
21	Ukraine – Russo-Ukrainian War	4,018.00	190.687	5,389.5	YES	YES	NO	YES	YES

No.	Countries and Types of Conflict	FDI WB (Million USD)	GDP IMF (Billion USD)	GDP per Capita	Energy & Minerals	Transport & Energy Routes	Food Producers	Water Resources	Cyber Security
22	Israel – Israeli-Palestinian War	14,777.90	542.285	54,176.7	YES	YES	NO	NO	YES
23	Palestine – Israeli-Palestinian War	/	/	/	YES	YES	NO	NO	NO
24	South Sudan – Ethnic violence	83.42	4.648	/	YES	NO	NO	NO	NO
25	War on drugs in Mexico	45,334.31	1,856.366	14,157.9	YES	NO	YES	NO	NO
26	Civil war in Afghanistan / Terrorist insurgency	20.60	18.080	413.8	NO	YES	NO	NO	NO
27	Civil war in Haiti / Gang war	40.87	25.285	/	NO	NO	YES	NO	NO
28	Civil war in Colombia / War on drugs	14,269.17	418.818	7,914.0	YES	NO	YES	YES	NO
29	Civil war in Bangladesh	1,508.19	450.461	2,593.4	NO	NO	NO	NO	NO
30	Civil war in Ethiopia	3,984.42	142.073	1,011.1	NO	NO	NO	NO	NO
31	Civil war in Myanmar	1,095.32	61.653	1,359.3	YES	YES	YES	YES	NO

No.	Countries and Types of Conflict	FDI WB (Million USD)	GDP IMF (Billion USD)	GDP per Capita	Energy & Minerals	Transport & Energy Routes	Food Producers	Water Resources	Cyber Security
32	Civil war in Sudan	548.20	29.184	989.3	YES	NO	NO	YES	NO
33	Civil war in Yemen	-370.98	19.101	633.9	NO	YES	NO	NO	NO
34	Civil war in Mozambique	3,508.63	22.745	647.3	YES	NO	NO	YES	NO
35	Civil war in Syria	804.16	/	847.4	YES	NO	NO	NO	NO
36	Civil war in Ecuador	317.70	124.676	6,874.7	YES	NO	NO	YES	NO
37	Civil war in the Central African Republic	40.41	2.831	516.2	NO	NO	NO	YES	NO
38	Afghanistan–Pakistan Border Conflict	2,725.60	371.408	1,484.7	NO	NO	NO	NO	NO

Source: Authors.

All countries, except Russia, Israel, and Mexico, meet almost all of the listed criteria. The most extreme conditions are found in Palestine, which possesses neither water nor natural resources, energy resources, nor mineral wealth, and by all other parameters also falls into the category of poor and underdeveloped states. Only 10 countries are not rich in minerals or energy resources, nor are they transit countries, but most of these states are rich in water resources and/or are major food producers, while as many as 28 countries possess mineral wealth and energy resources. Thus, poor and underdeveloped states not only lack transport infrastructure but also a developed cybersecurity network. Regarding the regions where conflicts are present, most of the states are located in Africa, but a significant number are also in the Middle East. “Statistical indicators are important for designing and evaluating policies” aimed at

improving societal progress, “as well as for assessing and influencing the functioning of economic markets” (Stiglitz, Sen, and Fitoussi 2008, 7). We are now living through one of the worst financial, economic, and social crises in post-war history (Stiglitz, Sen, and Fitoussi 2008, 8). This is particularly reflected in weak and underdeveloped states, i.e., those that do not have strong institutional systems capable of resisting global challenges and security risks. As this research shows, there is an interconnection between the development of democracy, population size, and number of states, human development (education, health, poverty, social security), and the economy (GDP, natural, mineral, energy, and mining resources, infrastructure) and security.

CONCLUSION

By observing the analyzed reports, in accordance with the Copenhagen School of Security, the following common characteristics of states can be identified. In the military sector, 38 states are directly engaged in armed conflicts, while in the political sector, almost all countries except Israel are non-democratic, featuring 23 authoritarian regimes characterized by instability, elite control over institutions, and the absence of free elections. This means that in these countries, there are no free and democratic elections, political power is unstable and does not inspire public trust, and institutions are controlled by political elites and are prone to corruption.

Economic – from an insufficiently developed democracy also arises a weak economic system, which in as many as 25 states is based on economic unfreedoms and unfair market conditions. This has a particularly negative impact on the social sphere (poverty, education, health, migration). A specific feature of all conflict-affected states except Palestine and Bangladesh is that they are rich in certain natural resources and/or minerals, ores, and energy sources (Uganda, Tanzania, Nigeria, Congo, Colombia, Mexico, Ecuador, Myanmar, etc.). Although they have an underdeveloped transport infrastructure, it is undeniable that many of them are located on existing or potential energy routes (Ukraine, Syria, Yemen, Iraq). However, all these states have a very low gross domestic product, lack sufficient foreign investment, and do not host major international companies. Due to weakly developed economies, they have low incomes per capita, i.e., low living standards, which classifies them as poor countries.

Social – in states with underdeveloped democracies, economic stagnation and poverty, social deviation is not uncommon in the form of the emergence of various conflict-prone ideologies (armament, terrorism, crime). This is further intensified by the lack of education, inaccessible healthcare services, and fear for human survival and development. In this sense, these states are highly prone to migration, which further complicates the security architecture, primarily of neighboring states, but also of Europe and the USA.

Environmental – regardless of the fact that most conflict-affected states possess significant natural and energy resources, all these potentials are devastated not only due to climate change, for which these states lack adequate response mechanisms, but also due to ongoing wars. Terrorism, armed groups, and military infrastructure are tools for achieving political goals, regardless of the damage inflicted on the environment.

Information-technology sector – 21st-century wars are inevitably accompanied by hybrid activities involving modern technologies and digitalization. From cyberattacks on critical infrastructure to information warfare and disinformation, increasing dependence of the economy, military, state, and individuals on the internet further deepens the problems of almost all conflict-affected states. Even before armed conflicts themselves, these states lack sufficiently strong instruments to deal with modern security threats of the fourth digital age.

As noted in the introduction, all these factors cannot be observed in isolation; rather, a set of common characteristics can be identified among states prone to conflict. These are primarily a lack of democracy and strong institutions, and an underdeveloped and unfree economy, which particularly enables states rich in natural resources, minerals and energy resources to become susceptible to various forms of instability that lead to conflicts.

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КОРЕЛАЦИЈА ГЛОБАЛНИХ ПРОБЛЕМА И БЕЗБЕДНОСТИ

Резиме

Проблем рада јесте чињеница да постоје региони дуготрајних конфликта, односно држава које су у сталним оружаним сукобима. Поставља се питање шта је њихов узрок, односно да ли постоје заједничке карактеристике држава које нису отпорне на савремене безбедносне претње? Које су глобалне промене допринеле развоју конфликта и које државе су склоне конфликтима? Циљ истраживања јесте да се анализом највећих глобалних проблема са којима се суочавају државе у рату, пронађу заједничке карактеристике (заједнички именитељи) због којих су ове државе у стању дуготрајних конфликта. Као основ овог истраживања послужиће секторски приступ Копенхагенске школе безбедности, који угрожавање безбедности разматра кроз различите секторе (војни, политички, економски, еколошки и социјетални).

Кључне речи: оружани сукоби, дуготрајни конфликти, глобални проблеми, безбедносне претње

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FROM TERRORIST EVENT TO POLITICAL EFFECT: AN ANALYTICAL MODEL OF THE POLITICAL CONSEQUENCES OF TERRORISM****

Abstract

The paper analyzes the relationship between a terrorist event and its political effect. It starts from the assumption that the immediate characteristics of a terrorist attack, such as the number of victims, target selection, mode of execution, and symbolic value of the attacked object, do not provide a sufficient explanation of its political consequences. The main aim of the paper is to formulate an analytical model that explains the political effect of a terrorist event as an outcome of the interaction between institutional, political, and social determinants. In this model,

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the terrorist event is treated as the initial analytical unit, while the political effect is treated as the dependent outcome to be explained. The model is empirically examined through a comparative analysis of three cases: the terrorist attacks in the United States on September 11, 2001, the Madrid attacks of March 11, 2004, and the Norway attacks of July 22, 2011. The analysis shows that the different political outcomes of these events can be explained more consistently by examining institutional responses, political definitions of the threat, and social interpretations of the attack than by relying solely on the immediate characteristics of the terrorist events themselves.

Keywords: terrorism, terrorist event, political effect, political consequences, institutional determinants, political determinants, social determinants, security policy, comparative analysis

INTRODUCTION: RESEARCH PROBLEM AND ANALYTICAL STARTING POINT

Terrorism represents one of the most significant challenges facing contemporary states, not only because of the immediate security consequences it produces, but also because of the political effects that may arise in the aftermath of a terrorist event. The number of victims, the mode of execution, target selection, and the symbolic value of the attacked object determine the immediate gravity of a terrorist act, but they do not always explain its ultimate political significance (Kydd and Walter 2006; Godefroidt 2023; Nagel, Nivette and Czymara 2024). Historical experience shows that terrorist events of similar operational intensity may produce different political consequences: ranging from a limited security response to changes in legislation, public attitudes, electoral behaviour or institutional trust as well as the reorganization of the security sector, shifts in foreign policy priorities, or a lasting reshaping of the relationship between the state and its citizens (Crenshaw 1981; Boin, 't Hart and McConnell 2009; Berrebi and Klor 2008; Rees and Smith 2022; Godefroidt 2023; Peri, Rees and Smith 2023; Nagel, Nivette and Czymara 2024; Petrović and Rašković Talović 2024).

Contemporary terrorism studies have developed numerous theoretical approaches that enable a better understanding of the causes

of terrorism, processes of radicalization, organizational forms of terrorist groups, their operational strategies, and their methods of target selection (Crenshaw 1981; Hoffman 2006; Rapoport 2004; Schmid 2011). At the same time, the existence of extensive international databases has made it possible for a more systematic empirical analysis of terrorist events (National Consortium for the Study of Terrorism and Responses to Terrorism [START] 2022). As a result, terrorism is now relatively well researched as a form of political violence, a strategy of coercion, a communicative act, and a security threat (Pape 2005; Kydd and Walter 2006; Godefroidt 2023; Freilich *et al.* 2024). However, the question of how a specific terrorist event becomes politically relevant to an extent that exceeds its immediate consequences remains insufficiently clarified.

The basic research problem of this paper arises from the disproportion between the immediate characteristics of a terrorist event and its ultimate political effect. Some terrorist attacks become turning points in the development of security policy, legislation, and the institutional organization of the state, while others, although no less significant in terms of the scale of violence, remain confined to an operational or short-term security level. Such disproportion indicates that political effect cannot be derived directly from the number of victims, the type of target, or the mode of execution of the attack (Hoffman 2006; Abrahms 2006; Kydd and Walter 2006; Godefroidt 2023; Germann, Godefroidt and Mendez 2026). Between the terrorist event and its political consequences lies a specific analytical space that requires the examination of mediating factors.

The subject of this paper is the mechanism through which the political effect of a terrorist event is produced. Unlike approaches that place the analytical emphasis on the causes of terrorism, the motivation of perpetrators, the organizational structure of terrorist groups, or processes of radicalization, this paper takes the terrorist event as its initial analytical unit. The terrorist event is therefore not treated as the phenomenon to be explained, but as the starting point for analysing the processes that unfold after it. The object of explanation is not the attack itself, but the political effect shaped in the aftermath of its execution.

The basic assumption of the paper is that the political effect of a terrorist event is not its direct and automatic consequence. Rather, it arises as a result of the interaction between institutional, political, and social determinants that mediate between the immediate act of political violence and the political consequences that follow. Institutional determinants

refer to the capacity and mode of response of state institutions; political determinants refer to processes of political decision-making, threat definition, and public policy choice; while social determinants include media mediation of the event, the formation of public opinion, the perception of threat, and the level of trust in institutions.

The aim of the paper is to formulate an analytical model that enables a more systematic understanding of the relationship between a terrorist event and its political effect. This model does not seek to offer a general theory of terrorism, nor to replace existing approaches in the study of terrorist violence. Its purpose is more narrowly defined: to explain why terrorist events with similar immediate characteristics may produce different political consequences. In this sense, the paper shifts the analytical focus from the question of why a terrorist attack was carried out to the question of how and under what conditions such an attack acquires political significance.

The scientific contribution of the paper lies in the analytical separation of the terrorist event and the political effect as two distinct categories of scientific analysis. The terrorist event represents the initial analytical unit, while the political effect represents the dependent outcome to be explained. Between these two categories operates a system of institutional, political, and social determinants. It is precisely their interaction that makes it possible to analyse the political consequences of a terrorist event as a distinct object of research, rather than as the implied or mechanical continuation of the terrorist act itself.

Starting from this framework, the paper first examines the scope and limits of the most important theoretical approaches to terrorism, then formulates an analytical model of the political effect of a terrorist event, and subsequently applies it to a comparative analysis of three cases: the terrorist attacks in the United States on September 11, 2001, the attacks in Madrid on March 11, 2004, and the attack in Norway on July 22, 2011. The selection of these cases enables the testing of the paper's basic assumption: that the different political effects of terrorist events can be explained more consistently through the interaction of institutional, political, and social determinants than through the immediate characteristics of the attacks themselves.

THEORETICAL STARTING POINTS AND RESEARCH GAP

Contemporary terrorism studies have developed several influential theoretical approaches that have significantly contributed to the understanding of terrorism as a specific form of political violence. Their value lies in the fact that they no longer treat terrorism as an isolated criminal phenomenon or as an expression of irrational violence, but rather as a historical, political, organizational, and communicative phenomenon. Yet an analysis of their respective objects of inquiry shows that the political effect of an individual terrorist event is most often not their central analytical unit.

David Rapoport's wave theory places terrorism within a broader historical framework and shows that modern terrorism has developed through different historical phases, from the anarchist and anti-colonial waves to the left-wing and religious waves (Rapoport 2004, 46–73). This approach enables an understanding of the long-term evolution of terrorism, its ideological foundations, and its historical patterns. However, its analytical unit is not the individual terrorist event, but the historical wave of terrorism as a form of development of political violence. For this reason, the political processes that emerge after a specific terrorist event remain outside the central focus of this approach.

Martha Crenshaw analyses terrorism as a form of political choice. Her approach moves beyond simplified interpretations of terrorism as exclusively irrational or pathological behaviour and shows that terrorist organizations act within a framework of political calculations, available resources, and expected state responses. Terrorism is thus understood as a strategy of political action under conditions of limited opportunity (Crenshaw 1981, 385–386). Nevertheless, the focus of this approach lies in the processes that precede the terrorist event: in the decision to use terrorism as a means of political struggle. The political effects that follow the event itself are not the primary object of analysis.

Bruce Hoffman places particular emphasis on the communicative and symbolic dimension of terrorism. A terrorist act is not merely physical violence, but a message directed at a wider audience, whose purpose is to generate fear, psychological pressure, and political insecurity. This approach is important because it shows that the immediate victims are not the only target of the attack, but rather a means of producing a broader political effect (Hoffman 2006, 40–41). However, here too the

focus of analysis is on the nature of the terrorist act, its function, and its political purpose, rather than on the subsequent institutional, political, and social processes that determine its ultimate political effect.

Robert Pape places terrorism within the framework of a strategy of political coercion. His analysis is directed at the question of the conditions under which terrorist violence can compel a state to change its political behaviour. In this respect, Pape brings the analysis of terrorism closer to the question of political effectiveness. Yet the analytical unit of his approach is not the individual terrorist event, but terrorist strategy as an instrument of coercion (Pape 2005, 27–45). The consequences of a specific terrorist event are considered within the broader relationship between the terrorist organization and the state, rather than as an autonomous process requiring separate analytical explanation.

The synthetic approach of Alex P. Schmid is of particular importance for the conceptual grounding of terrorism studies. Schmid seeks to systematize different definitions, concepts, and approaches, starting from the fact that terrorism is a complex and multidimensional phenomenon. His contribution is especially important in terms of clearer conceptual differentiation and the interdisciplinary understanding of terrorism (Schmid 2011, 39–98). However, in this case as well, the object of analysis is terrorism as a complex social and political phenomenon, rather than the political effect of an individual terrorist event.

The foregoing overview does not imply that existing theories are incomplete or insufficient within the scope of their own research questions. On the contrary, their significance remains undisputed for understanding terrorism as a historical, political, organizational, communicative, and strategic phenomenon. However, they most often start from the questions of why terrorism emerges, how terrorist actors operate, which strategies they use, and what kind of political message they seek to produce. Less attention is devoted to the question of how a specific terrorist event, once it occurs, is translated into institutional, political, and social consequences.

More recent research has increasingly focused on the political and social consequences of terrorist attacks. Studies show that terrorism may influence political attitudes and public opinion, although the magnitude, direction, and duration of these effects vary considerably across contexts (Godefroidt 2023; Nagel, Nivette and Czymara 2024; Germann, Godefroidt and Mendez 2026). Existing research indicates that post-attack responses may involve changes in institutional trust,

perceptions of security and threat, attitudes toward out-groups, and public support for restrictive counterterrorism measures. At the same time, these reactions are neither uniform nor automatic. Their intensity may depend on the characteristics of the attack, the broader political and social context, the timing of measurement, and the way in which the event is interpreted and communicated to the public (Godefroidt 2023; Epifanio, Giani and Ivandic 2023; Nagel, Nivette and Czymara 2024; Germann, Godefroidt and Mendez 2026). This heterogeneity suggests that the political consequences of terrorism should not be understood simply as direct responses to the attack itself, but as outcomes shaped by processes that unfold after the event. Existing studies, however, tend to examine particular dimensions of this post-attack process, such as public attitudes, media dynamics, political framing, institutional trust, or policy responses, rather than systematically examining how these dimensions interact within a single analytical framework (Boin, 't Hart and McConnell 2009; Godefroidt 2023; Epifanio, Giani and Ivandic 2023; Volker 2024; Germann, Godefroidt and Mendez 2026). Consequently, there remains a need for an analytical approach that connects institutional, political, and social responses and examines their combined role in shaping the broader political effect of a terrorist event.

It is precisely here that the research gap of this paper opens. While previous studies provide important insights into individual institutional, political, and social consequences of terrorist attacks, less attention has been devoted to their interaction as part of a common post-attack process. The present study, therefore, focuses on the mediating space between the terrorist event and its broader political effect, in which institutional responses, political interpretation, and social reactions interact and jointly shape the political consequences of the event. Starting from this premise, this paper does not seek to explain terrorism as a whole, nor to offer a new general theory of terrorist violence. Its starting point is narrower and more analytically defined: the individual terrorist event is treated as the initial analytical unit, while the political effect is treated as the outcome to be explained. This shift in focus makes it possible to analyse the political consequences of a terrorist event as the result of the interaction between institutional, political, and social determinants, rather than as a direct, linear, or implied consequence of the act of violence itself.

ANALYTICAL MODEL OF THE POLITICAL EFFECT OF A TERRORIST EVENT

The starting point of the proposed analytical model is the distinction between the terrorist event and the political effect as two analytically connected, yet distinct, categories. Conventional interpretations of terrorist violence often assume that there is a direct relationship between the intensity of an attack and its political consequences. According to such an understanding, a more severe attack should produce a stronger political effect, while a more limited attack should remain within the boundaries of a narrower security response. However, empirical research suggests that the political and social consequences of terrorist attacks are neither uniform nor necessarily proportional to the immediate severity of the event, but vary considerably across political, institutional and social contexts (Abrahms 2006; Kydd and Walter 2006; Mueller 2005; Peri, Rees and Smith 2023; Godefroidt 2023; Nagel, Nivette and Czymara 2024; Germann, Godefroidt and Mendez 2026). Terrorist events with similar immediate characteristics may produce different political outcomes, while events of different operational intensity may sometimes lead to comparable political consequences (Bali 2007; Montalvo 2011; Berrebi and Klor 2008; Kearns, Betus and Lemieux 2019).

For this reason, the terrorist event is not treated in this paper as the final explanation of its own political consequences. It represents the initial analytical unit, that is, the immediate act of political violence that triggers a series of institutional, political, and social reactions. A terrorist event is understood here as a concrete act of intentional use, or threat of use, of violence in pursuit of a political, ideological, or religiously motivated objective (Institute for Economics & Peace 2022, 7). At this level of analysis, its immediate characteristics are relevant: the place and time of execution, target selection, the number of victims, the means employed, the organizational pattern, and responsibility for the attack. Nevertheless, these characteristics have the status of initial conditions of analysis, rather than a sufficient explanation of political effect.

The political effect of a terrorist event denotes subsequently generated political consequences that can be linked to the terrorist attack, but cannot be mechanically derived from its immediate characteristics. It may be manifested through changes in legislation, the reorganization of the security sector, the establishment of new institutions, shifts in public policy, changes in foreign policy orientation, electoral consequences,

or a more lasting reshaping of the relationship between the state and its citizens (Kydd and Walter 2006; Abrahms 2006; Berrebi and Klor 2008; Boin, 't Hart and McConnell 2009; Rees and Smith 2022; Ari *et al.* 2024). Political effect, therefore, is not a property of the terrorist event itself, but an outcome of the process that develops after it is carried out.

The basic assumption of the model is as follows: a terrorist event is a necessary, but not a sufficient, condition for the emergence of political effect. It initiates a process, but it does not independently determine its scope, direction, or intensity. Political effect arises in the space of mediation between the immediate act of political violence and the political consequences that follow it (Kydd and Walter 2006; Abrahms 2006). In this space, three groups of determinants operate: institutional, political, and social.

Institutional determinants refer to the capacity, structure, and mode of response of state institutions after a terrorist event. They include the effectiveness of the security system, the degree of coordination among institutions, the legal and strategic framework for counterterrorism, crisis-management capacity, and the institutional resilience of the state (Đorić and Obrenović 2024; Christensen, Lægreid and Rykkja 2015). Their relevance extends beyond the immediate operational response, since institutional reactions may shape the scope and form of the political consequences that develop after an attack. Depending on the institutional context and the nature of the response, a terrorist event may lead to substantial legislative and organizational reforms or, alternatively, to more limited adjustments within the existing legal and institutional framework (National Commission on Terrorist Attacks upon the United States 2004; Boin, 't Hart and McConnell 2009; Petrović and Rašković Talović 2024).

Political determinants refer to the way in which political actors define a terrorist event, interpret the nature of the threat, and choose the measures that will follow it (Kydd and Walter 2006; Bali 2007; Montalvo 2011; Ari *et al.* 2024; Pavličević 2025; Volker 2024). They include the process of political decision-making, parliamentary and governmental responses, legislative initiatives, the selection of public policies, foreign policy positioning, and the degree of political consensus or conflict. Within these determinants, a terrorist event may be defined as a limited security incident, an attack on the constitutional order, a trigger for reform of the security system, or a basis for a broader change in political direction (Boin, 't Hart and McConnell 2009; Ari *et al.* 2024;

Volker 2024). Precisely for this reason, political determinants play a central role in transforming a terrorist event into a politically relevant process.

Social determinants include the ways in which the public, the media, and the broader social context respond to a terrorist event. They are manifested through media representation of the attack, the formation of public opinion, perceptions of the level of threat, the level of fear, social mobilization, trust in institutions, and public readiness to accept certain political measures (Kearns, Betus and Lemieux 2019; Glazzard and Reed 2021; Oswald, Furst and Johann 2023; Amarasinghe 2023; Epifanio, Giani and Ivandic 2023; Kantorowicz, Kantorowicz-Reznichenko and de Vries 2025). Social determinants usually do not produce political decisions directly, but they shape the space in which such decisions are made. They may intensify political pressure, legitimize extraordinary measures, limit political radicalization, or direct public debate toward questions of responsibility, solidarity, or the preservation of the democratic order.

The proposed model does not assume that these three groups of determinants operate separately. On the contrary, political effect emerges through their interaction. Institutional capacities influence political decision-making; political decisions shape social reactions; and social reactions, in turn, act upon political actors and institutions. Political effect is therefore not the sum of institutional, political, and social reactions, but the result of their mutual interaction within a concrete context.

Conceptually, the model can be represented as a relationship among five analytical categories: the terrorist event, institutional determinants, political determinants, social determinants, and political effect. The terrorist event represents the initiating condition; institutional, political, and social determinants represent the mediating mechanism; and political effect represents the dependent outcome. The basic logic of the model may be presented as follows:

*terrorist event → institutional, political, and social
determinants → political effect*

This representation should not be understood as a one-directional and mechanical causal scheme. Its purpose is to show that political effect is not derived directly from the attack itself, but from the way in which the terrorist event is institutionally processed, politically defined,

and socially interpreted. In other words, the model does not explain why a terrorist attack was carried out, but how it becomes politically significant.

The value of the proposed model does not lie in introducing new elements into the study of terrorism, but in connecting existing elements in a different analytical way. Institutions, political actors, the media, and the public are already present in various studies of terrorism; however, in this model, they are not treated as a secondary context, but as the mediating mechanism that shapes the political effect of a terrorist event. In this way, the terrorist event acquires the status of an analytical constant, while the political effect is treated as a variable outcome to be explained.

The selection of institutional, political, and social determinants does not rest on the assumption that these are the only factors capable of influencing the political consequences of a terrorist event. Economic, cultural, historical, and international circumstances may undoubtedly play an important role in particular cases. However, in the proposed model, they are not singled out as separate analytical categories because they do not represent the immediate mechanisms through which a terrorist event is translated into political effect. Rather, they operate indirectly, through institutional capacity, political decision-making, and the social interpretation of the event.

Such differentiation allows the model to remain sufficiently broad to encompass different political contexts, while also remaining sufficiently precise so as not to become an unlimited list of all possible factors. Its analytical value lies precisely in isolating those determinants that directly mediate between the terrorist event as the initial analytical unit and the political effect as the outcome to be explained.

A model formulated in this way enables the comparative analysis of different terrorist events. If two or more attacks have similar immediate characteristics but different political consequences, the explanation cannot remain at the level of describing the attacks themselves. It is necessary to examine the institutional capacities, political decision-making, and social reactions that followed them. This analytical shift constitutes the basis for the empirical examination of the model in the following section.

METHODOLOGICAL FRAMEWORK AND EMPIRICAL EXAMINATION OF THE MODEL

The empirical examination of the proposed analytical model is based on a qualitative comparative analysis of three terrorist events: the attacks in the United States on September 11, 2001, the attacks in Madrid on March 11, 2004, and the attack in Norway on July 22, 2011. These cases were selected because they represent terrorist events of high intensity, strong public impact, and considerable security significance, yet they produced different political effects. It is precisely this difference that makes it possible to test the basic assumption of the paper: that political effect is not a direct consequence of the terrorist event itself, but the result of the interaction between institutional, political, and social determinants.

The analytical unit in the research is not the terrorist organization, the state, or the security system, but the individual terrorist event. Each case is analysed by applying the same analytical framework: first, the immediate characteristics of the attack are identified, and then the institutional, political, and social determinants that shaped its political effect are examined. This ensures the comparability of different cases without reducing their political consequences to the number of victims, the type of target, or the mode of execution.

For the purposes of the analysis, political effect is understood as a set of political changes that can reasonably be linked to the terrorist event under examination. These changes may be normative, institutional, political, or strategic. Normative changes include amendments to laws and other regulations; institutional changes include the establishment of new bodies or the reorganization of existing institutions; political changes include electoral outcomes, changes in public policy, and shifts in political decision-making; while strategic changes include changes in the security, defence, or foreign policy of the state. These forms do not constitute a hierarchy of political effects, but rather an analytical framework for their identification and comparison.

The analysis focuses on immediate and medium-term political effects that can be reasonably attributed to the terrorist event under examination. Long-term political changes are not the direct subject of this paper, because over a longer period, numerous independent economic, international, electoral, and institutional factors become involved in the

political process. This limitation is necessary in order to avoid excessive attribution of later political changes to a single terrorist event.

The operationalization of the model is based on linking each analytical category with appropriate indicators, data sources, and methods of analysis. The terrorist event is analysed through the number of victims, the type of target, the means of execution, and the responsibility for the attack. Institutional determinants are examined through legislative changes, institutional reforms, and organizational changes. Political determinants are analysed through government decisions, parliamentary measures, changes in public policy, and foreign policy activities. Social determinants are examined through media reporting, public opinion, social reactions, and the level of trust in institutions. Political effect is established through a synthetic analysis of all the above sources, as an outcome encompassing institutional, political, and social changes after the terrorist event.

This operationalization ensures that all cases are analysed according to the same criteria. Its function is not merely descriptive, but methodological: it enables the verifiability of the procedure, the clear separation of analytical categories, and the comparability of the results of the comparative analysis.

In the case of the terrorist attacks in the United States on September 11, 2001, the immediate security effect was exceptionally high. The attack produced a large number of victims, a powerful symbolic shock, and a profound change in the public perception of security (National Commission on Terrorist Attacks upon the United States 2004, 285–315). However, its ultimate political effect did not arise solely from the intensity of the attack, but from the way in which it was institutionally, politically, and socially processed. Institutionally, profound organizational and normative changes followed, including the reform of the homeland security system, the establishment of new institutions, and the expansion of the powers of state authorities in the field of counterterrorism (Homeland Security Act 2002; National Commission on Terrorist Attacks upon the United States 2004). Politically, the attack was defined as a strategic threat requiring a comprehensive change in security and foreign policy (The White House 2002, sec III). Socially, a high level of mobilization, a sense of vulnerability, and broad support for stricter security measures created a framework within which far-reaching political decisions received strong legitimacy (Glazzard and Reed 2021;

Boin, 't Hart and McConnell 2009). For this reason, the political effect of this case was systemic and transformational in character.

The attacks in Madrid on March 11, 2004, demonstrate a different mechanism through which political effect is produced. Although they too represented a severe terrorist event with a large number of victims and strong public impact, the political effect was not manifested through a profound institutional reform of the security system (Rose, Murphy and Abrahms 2007; Bali 2007). The institutional response was rapid and functional, but it did not constitute the main source of political transformation. The key role was played by political and social determinants, above all, the fact that the attack occurred immediately before parliamentary elections. The way in which the government communicated the nature of the threat, the question of political responsibility, and the reaction of the public influenced the political atmosphere during the electoral period (Bali 2007; Montalvo 2011). Social reactions, mass protests, and the loss of trust in the official interpretation of the event became an important part of the political process (Bali 2007; Glazzard and Reed 2021). The political effect of this case was manifested through a change of government and a reassessment of foreign policy orientation, including the decision to withdraw Spanish forces from Iraq (Rose, Murphy and Abrahms 2007; Montalvo 2011). Unlike the American case, this did not lead to systemic transformation, but to a national political change within a specific electoral context.

The attack in Norway on July 22, 2011, reveals a third pattern. Although the attack was exceptionally severe, with a large number of victims and a strong impact on the public, its political effect remained limited in comparison with the previous two cases. The institutional response was directed toward identifying failures, correcting procedures, and improving capacities, but without a radical change in the constitutional or security order. Political actors did not define the attack as a basis for introducing emergency measures or expanding state powers, but instead emphasized the need to preserve democratic institutions and values (NOU 2012; Christensen, Lægreid and Rykkja 2015). Social reactions were marked by solidarity, trust in institutions, and a rejection of political radicalization (Christensen, Lægreid and Rykkja 2015; Glazzard and Reed 2021). In this case, institutional, political, and social determinants operated in the direction of limiting the political effect, keeping the response within the framework of the existing democratic order (Boin, 't Hart and McConnell 2009; Christensen, Lægreid and Rykkja 2015).

A comparative insight into the three analysed cases shows that the immediate characteristics of a terrorist event do not, by themselves, explain its political effect. All three events had considerable security significance and strong public impact, but they produced different political outcomes. In the United States, the political effect was systemic and transformational; in Spain, it was connected to the electoral process and a change in political course; in Norway, it remained limited and oriented toward institutional corrections without broader political transformation.

These results confirm the analytical value of the proposed model. Differences in political outcomes can be explained more consistently by the way in which institutional, political, and social determinants mediated between the terrorist event and political effect than by the immediate characteristics of the attack itself. The American case shows how the mutual operation of institutional reform, the political definition of the threat, and social mobilization can produce systemic transformation. The Spanish case shows how political context and public reaction can turn a terrorist event into an immediate factor of electoral and foreign policy change. The Norwegian case shows how institutional stability, political restraint, and social insistence on democratic values can limit political effect even after an exceptionally severe attack.

Table 1 summarizes the main findings of the comparative analysis across the three selected cases.

Table 1. Comparative Analysis of political effects in the three selected cases

Analytical category	United States, 2001	Spain, 2004	Norway, 2011
Institutional determinants	Profound institutional reforms	Limited institutional changes	Institutional continuity and corrections
Political determinants	Change in security and foreign policy	Change of government and foreign policy orientation	Preservation of the democratic political framework
Social determinants	High mobilization and support for security measures	Public pressure and the question of political responsibility	Social cohesion and trust in institutions
Political effect	Systemic transformation	National political change	Limited political effect

Source: Authors' compilation.

The comparative analysis conducted in this paper shows that the proposed model has explanatory rather than predictive value. Its purpose is not to predict in advance the political consequences of a terrorist event, but to enable a consistent explanation of how those consequences arise. In this sense, the model makes it possible to analyse the political effect of a terrorist event as a distinct outcome mediated by institutional, political, and social determinants.

CONCLUSION

The starting point of this paper was that the political significance of a terrorist event cannot be explained exclusively by its immediate characteristics. The number of victims, target selection, mode of execution, and symbolic value of the attack undoubtedly determine its security significance, but they do not always explain its ultimate political effect. Terrorist events of similar operational intensity may produce different political consequences, which indicates that there is no direct and linear relationship between an act of political violence and its political outcome.

For this reason, the paper proposed an analytical model that separates the terrorist event and the political effect as two distinct categories of scientific analysis. The terrorist event is treated as the initial analytical unit, while the political effect is treated as the outcome to be explained. Between these two categories lies a space of mediation in which institutional, political, and social determinants shape the scope, direction, and intensity of political consequences.

The main theoretical contribution of the paper lies in shifting the analytical focus from the terrorist event itself to the processes that unfold after it. The paper does not call into question the significance of existing theories of terrorism, nor does it seek to offer a general theory of terrorist violence. On the contrary, it builds upon their insights, but defines the object of inquiry more narrowly: it does not examine why terrorism emerges, how terrorist organizations operate, or which strategies they use, but rather how an individual terrorist event acquires political significance.

The empirical examination of the model, based on a comparative analysis of the attacks in the United States in 2001, Madrid in 2004, and Norway in 2011, showed that different political outcomes cannot be sufficiently explained by the immediate characteristics of the attacks

themselves. In the American case, the political effect acquired a systemic and transformational character; in the Spanish case, it was connected to the electoral process, a change of government, and a reorientation of foreign policy; while in the Norwegian case, it remained limited, with the preservation of the democratic political framework and institutional continuity. These differences confirm that the political effect of a terrorist event depends on the way institutions respond, political actors define the threat, and society interprets and evaluates the event itself.

The scientific contribution of the paper lies in three mutually connected levels. The first is conceptual and concerns the analytical separation of the terrorist event and the political effect. The second is methodological and consists of the formulation of a model that treats political effect as the outcome of the interaction between institutional, political, and social determinants. The third is empirical and derives from the application of the model to three comparatively selected cases, demonstrating that the proposed framework allows for a more consistent interpretation of the different political consequences of terrorist events.

The scope of the proposed model should be understood precisely. It does not have a predictive function and does not make it possible to reliably forecast the political consequences of future terrorist events. Its value is explanatory: the model enables a systematic analysis, after a terrorist event has occurred, of the mechanisms that led to a particular political outcome. At the same time, the model does not exhaust all possible factors that may influence the political consequences of terrorism. Economic, international, cultural, and historical circumstances may be significant, but within this framework, they are treated as indirectly present through institutional, political, and social determinants.

The proposed analytical model should therefore be understood as a basis for further comparative research into the political consequences of terrorist events. Its application to a larger number of cases, different political systems, and different historical periods could contribute to a more precise understanding of the conditions under which a terrorist event acquires a limited, national, or systemic political effect. In this sense, the main contribution of the paper does not lie in the claim that a terrorist event necessarily produces a particular political outcome, but in showing that such an outcome can be scientifically analysed only if the terrorist event and the political effect are clearly separated, and if the relationship between them is explained through mediating institutional, political, and social mechanisms.

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ОД ТЕРОРИСТИЧКОГ ДОГАЂАЈА ДО ПОЛИТИЧКОГ ЕФЕКТА: АНАЛИТИЧКИ МОДЕЛ ПОЛИТИЧКИХ ПОСЛЕДИЦА ТЕРОРИЗМА****

Резиме

У раду се анализира однос између терористичког догађаја и његовог политичког ефекта, полазећи од претпоставке да непосредне карактеристике терористичког напада, као што су број жртава, избор циља, начин извршења и симболичка вредност нападнутог објекта, не представљају довољно објашњење његових политичких последица. Циљ рада је формулисање аналитичког модела који политички ефекат терористичког догађаја објашњава као исход интеракције институционалних, политичких и друштвених детерминанти. Модел је емпиријски испитан компаративном анализом три случаја: терористичких напада у Сједињеним Америчким Државама 11. септембра 2001. године, напада у Мадриду 11. марта 2004. године и напада у Норвешкој 22. јула 2011. године. Сва три случаја анализирана су према истом оквиру који обухвата институционалне реакције, политичко дефинисање

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претње, друштвене реакције и настале политичке последице. Резултати показују да слична тежина терористичког догађаја не доводи увек до истог обима и типа политичких последица. У Сједињеним Америчким Државама напад је био праћен дубоким институционалним и нормативним променама, реорганизацијом система унутрашње безбедности и променама у безбедносној и спољној политици. У Шпанији је политички ефекат био снажно повезан са изборним контекстом, реакцијом јавности и питањем политичке одговорности, што је допринело промени власти и преиспитивању спољнополитичког курса. У Норвешкој је, упркос тежини напада, политички ефекат остао ограниченији и усмерен на институционалне корекције, уз очување демократског политичког оквира и висок ниво друштвене кохезије. Компаративна анализа показује да политички ефекат није директна и механичка последица напада већ зависи од начина на који институције реагују, политички актери дефинишу претњу, а јавност и медији интерпретирају догађај. Предложени модел има пре свега објашњавајућу функцију и може представљати основу за даља компаративна истраживања политичких последица терористичких догађаја.

Кључне речи: тероризам, терористички догађај, политички ефекат, политичке последице, институционалне детерминанте, политичке детерминанте, друштвене детерминанте, безбедносна политика, компаративна анализа

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COMPETING GEOECONOMIC LOGICS: EU AND CHINA'S IMPACT ON THE WESTERN BALKANS' REGIONALISM BETWEEN 2013 AND 2025***

Abstract

This article examines how distinct geoeconomic logics advanced by the European Union and China generate differentiated mechanisms of regional integration and fragmentation across the Western Balkans between 2013 and 2025. Rather than treating external influence as uniformly integrative or destabilizing, it asks whether competing external influences foster integration or deepen fragmentation across the region.

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*** The paper presents findings of a study developed as a part of the research project "Serbia and challenges in international relations in 2026", financed by the Ministry of Science, Technological Development and Innovation of the Republic of Serbia, and conducted by the Institute of International Politics and Economics, Belgrade, during the year 2026.

Building on a comparative framework of actor logics, the article contrasts the EU's regulatory, market-based, and standards-driven approach with China's project-oriented, loan-financed, and bilateral engagement model. It argues that competition between these geoeconomic logics does not simply promote or undermine regional cooperation. Instead, this dynamic leads to a model of "intersecting regionalism", combining EU-led, formal institutional frameworks with China-backed, project-oriented initiatives. In this context, the Western Balkans emerges as a significant area where competing geoeconomic logics intersect, reshaping established patterns of regional cooperation. Empirically, the paper focuses on two arenas where these logics intersect – infrastructure/transport and energy. In the infrastructure sector, the analysis focuses on transport and connectivity initiatives in the Western Balkans between 2013 and 2025, comparing Chinese loan-financed projects implemented by Chinese contractors with EU-supported initiatives developed under the Connectivity Agenda and the Berlin Process. Energy is assessed in light of projects implemented and/or financed by one of the two sides – the EU and China. The article proposes that the interaction of EU and Chinese geoeconomic logics may contribute to the emergence of a form of intersecting regionalism in the Western Balkans, combining institutional integration with project-based connectivity and generating differentiated outcomes across sectors.

Keywords: Western Balkans, geoeconomics, regionalism, European Union, China, infrastructure connectivity, energy governance

INTRODUCTION

The Western Balkans occupies a paradoxical position in contemporary European affairs. More than two decades after the 2003 Thessaloniki Summit affirmed that "the future of the Balkans is within the European Union" (European Council 2003), the region remains outside the Union, caught in a prolonged accession stalemate that has weakened trust and created space for competing external actors. The period 2013–2025 marks a critical juncture in this process. China's launch of the Belt and Road Initiative (BRI) in 2013 positioned the Western Balkans as a node in Eurasian connectivity, while the EU

sought to reinforce its engagement through the Berlin Process (2014), Connectivity Agenda (2015), Economic and Investment Plan (2020), and Growth Plan (2023). These parallel initiatives provide an opportunity to examine how competing geoeconomic logics shape regional dynamics.

Existing scholarship has extensively examined the EU's role in regional integration and China's growing economic presence in the Western Balkans (Zweers *et al.* 2020; Cotella and Berisha 2021; Markovic Khaze and Wang 2021; Jaćimović *et al.* 2023), but these literatures have largely developed separately. Consequently, limited attention has been paid to how competing external strategies interact to shape regional cooperation. This article addresses the following research gap: Do competing external influences foster regional integration or deepen fragmentation in the Western Balkans?

We argue that the interaction between EU and Chinese geoeconomic strategies has produced a form of *intersecting regionalism*, combining EU-led formal institutional frameworks with China's project-oriented development initiatives. This hybridity is not simply the coexistence of two parallel processes. Their interaction produces distinct patterns of regional cooperation that cannot be explained by either model alone. The article argues that the interaction of EU and Chinese geoeconomic strategies produces an intersecting form of regionalism whose effects are sector-dependent – while infrastructure projects generate material interdependencies that facilitate regional integration, energy cooperation remains constrained by national sovereignty and strategic interests, producing persistent fragmentation.

The contrast is particularly visible in transport and energy. In transport, both EU-supported corridors and Chinese-financed railways and highways generate physical interdependencies that encourage cross-border coordination and regional cohesion. Projects such as the Belgrade–Budapest railway, Corridor Vc, and the Adriatic–Black Sea rail network illustrate how infrastructure creates shared economic interests and functional incentives for cooperation, regardless of external sponsorship. Energy presents a contrasting pattern of persistent fragmentation. Despite all Western Balkan states being parties to the Energy Community Treaty and formally committed to integrating their energy markets with the EU, implementation remains uneven. The region-wide blackout of June 2024 highlighted the consequences of insufficient cross-border coordination in grid management and emergency response (ENTSO-E 2025). This divergence demonstrates

that shared institutional membership does not automatically produce functional integration. Whereas transport infrastructure creates material interdependencies that encourage cooperation, energy remains closely tied to national sovereignty, control over strategic assets, and security concerns.

The comparison, therefore, suggests that the effects of competing geoeconomic strategies are mediated not only by the external actors' approaches but also by sector-specific characteristics. The Western Balkans thus provides a useful case for examining how competing geoeconomic strategies interact and produce uneven regional outcomes. The article first situates the analysis within debates on regionalism and geoeconomics, then examines EU and Chinese engagement in the region's transport and energy sectors. It subsequently discusses the implications for understanding the emerging form of regionalism in the Western Balkans before concluding.

HOW DO REGIONALISM AND GEOECONOMIC LOGIC INTERTWINE? THEORETICAL INPUTS

From Old to New Regionalism: Theoretical Foundations

Regionalism has evolved significantly from the "old" regionalism of the 1950s and 1960s to the "new" regionalism that emerged in the mid-1980s and expanded after the Cold War. Old regionalism, exemplified by the European Economic Community, CACM, and ASEAN, emphasized formal institution-building, legal harmonization, and political integration. Grounded mainly in functionalism, neo-functionalism, and intergovernmentalism, it viewed integration as a state-led or supranational process based on shared rules and institutions (Söderbaum 2015, 10–13; Saurugger 2014, 232). The European experience, however, produced a Eurocentric bias, limiting the applicability of these approaches to regional integration in developing regions (Bøås, Marchand and Shaw 2003, 202–204).

New regionalism emerged from the mid-1980s, characterized by more flexible, open-ended, and market-driven cooperation involving states, non-state actors, private capital, and external powers. It emphasizes functional cooperation, "soft" institutionalization, overlapping memberships, and pragmatic projects over supranational political integration (Hurrell 1995; Söderbaum 2017). Post-Cold War

scholarship sought to overcome Eurocentrism through international political economy, constructivist approaches such as the New Regionalism Approach (NRA), and rationalist methodologies within comparative political economy. These approaches generally reject neo-functionalism assumptions of linear integration, policy spillovers, and a shift of loyalty from national to supranational institutions (Saurugger 2014, 232–233).

The Belt and Road Initiative, launched by China in 2013, represents a significant expression of new regionalism. Grimm and Li (2018) describe it as a “hybrid model of regionalism,” combining old regionalism’s state leadership and infrastructure-led functional cooperation with new regionalism’s flexible institutions, lack of supranational structures, and heterogeneous membership. Rather than formal integration, the BRI relies on project-based connectivity. Liu (2026, 8–11) further conceptualizes this as “regionalism with Chinese characteristics,” marked by interregional integration, infrastructure as a catalyst, cross-sectoral cooperation, flexible institutions, Chinese political narratives, and global ambitions.

Because “regional cooperation,” “regional integration,” “regionalism,” and “regionalization” lack universally accepted definitions, this study adopts a specific conceptual distinction. Drawing on Kacowicz (1999), Söderbaum (2007), and Fawcett and Gandois (2010), the term “regionalism” in this paper refers to the political and institutional process of developing a region through voluntary cooperation and policy coordination among state and non-state actors. This process leads to the creation of joint institutional arrangements aimed at advancing shared interests. Regional cooperation is conceptualized as the empirical manifestation of regionalism, namely as the degree of institutionalization and the intensity of coordinated action among states within a given region (Hurrell 1995; Bechev 2005). Thus, regionalism denotes the process and political project, while regional cooperation represents its concrete institutional and policy outcomes.¹

¹ In accordance with the aforementioned conceptualization, regional integration constitutes a form of regional linkage characterized by the surmounting of political, economic, and social barriers. Unlike regional cooperation, which tends to be more flexible, regional integration is distinguished by a higher degree of institutionalization.

Deploying Geoeconomics as an Analytical Framework

Geoeconomics provides a framework for analysing how the EU and China use economic instruments to pursue geopolitical objectives in the Western Balkans. Unlike traditional geopolitics, it focuses on the strategic use of trade, investment, finance, infrastructure, technology, aid, sanctions, and supply chains to shape political outcomes, create dependencies, and influence the balance of power (Blackwill and Harris 2016; Scholvin and Wigell 2018). Geoeconomic logic, therefore, combines geopolitical objectives with economic instruments, treating economic relations as tools of statecraft rather than purely market-driven interactions.

This perspective is particularly relevant to the Western Balkans, where EU-China competition extends beyond commercial interests. Both actors use economic instruments to shape political orientation and external alignments, but according to different logics. China's approach is predominantly pragmatic, project-oriented, and bilateral, while the EU's approach is embedded in enlargement and based on regulatory convergence, institutional reform, and political conditionality (Grieger 2018; Stekić and Nikolić 2025). Geoeconomics, therefore, helps explain how infrastructure, investment, finance, and trade function as mechanisms of strategic influence. This study conceptualizes geoeconomic logic as the use of economic instruments by the EU and China to shape regional alignment, institutional dependence, and connectivity in the Western Balkans, influencing whether regional cooperation develops toward cohesion or fragmentation. Blackwill and Harris (2016, 49) identify seven geoeconomic instruments: trade policy, investment policy, economic and financial sanctions, cyber, aid, financial and monetary policy, and energy and commodities. This study focuses particularly on infrastructure, connectivity, and energy investments, as these are among the main channels through which the EU and China influence regional cooperation and political alignment.

The EU's geoeconomic policy follows a regulatory and standards-based logic (Wigell 2016, 145). It seeks to integrate the Western Balkans into the European Single Market through regulatory harmonization, institutional reform, and compliance with the *acquis communautaire*. Instruments such as the IPA, the WBIF, and the Reform and Growth Facility link financial support to governance, environmental, and democratic reforms. Between 2007 and 2023, the EU committed

approximately €38 billion to the region, roughly one-third in grants and two-thirds in loans, reinforcing a model in which financial assistance is conditional on regulatory harmonization and structural reform (Jovanović and Stojadinović 2025, 23–24). China's geoeconomic logic is predominantly project-oriented and loan-financed, centred on BRI projects. Rather than regulatory convergence or political conditionality, Chinese cooperation emphasizes tangible infrastructure (highways, railways, bridges, energy facilities, and industrial investments) through bilateral agreements. Chinese grants have been relatively modest, while financial support has primarily taken the form of loans from Chinese policy banks linked to infrastructure projects implemented by Chinese state-owned enterprises. Chinese construction projects in the Western Balkans totalled approximately \$19 billion between 2010 and 2024, including \$14.7 billion in Serbia (Jovanović and Stojadinović 2025, 26–33).

Intersecting Regionalism: The Western Balkans as a Space of Competing Geoeconomic Logics

Western Balkans regionalism broadly reflects new regionalism because it extends beyond trade liberalization to wider economic, political, and social cooperation (Milošević and Hrnjaz 2023, 53). It is characterized by overlapping institutions and initiatives rather than a single dominant regional project. Alongside the core framework of regional economic integration represented by CEFTA 2006, the RCC, Energy Community, Transport Community, and Berlin Process have promoted deeper forms of economic coordination, infrastructure development, and political cooperation. Although a somewhat greater degree of regional ownership is reflected in the activities of the Regional Cooperation Council, regional cooperation remains dependent on external political guidance and financial support, resulting in layered and fragmented regionalism.

Western Balkans regionalism is also externally anchored. Cooperation has largely served the EU enlargement strategy and Stabilization and Association Process, with regional cooperation functioning as a condition for EU accession (European Commission n.d.b.). This has created a hybrid model combining EU-led structures, CEFTA-based market integration, informal cross-border ties, and state-led initiatives such as Open Balkan. At the same time, the region is

subject to overlapping external influences, particularly from the EU and China, alongside Russia and NATO. Western Balkans regionalism, therefore, combines “hard” externally driven structures with “soft” voluntary arrangements across a fragmented institutional landscape. At the same time, the region has increasingly become an arena of competing external geoeconomic strategies. Geoeconomics shifts the analysis from regional cooperation as a purely developmental or institutional process toward cooperation as a site of strategic competition. Infrastructure networks, regional institutions, and economic corridors become instruments through which external actors organize space according to different political and economic logics.

This study, therefore, introduces *intersecting regionalism*, defined as a form of regional cooperation in which competing external geoeconomic logics overlap within the same geographic and institutional space, shaping the trajectory of regional cooperation. In the Western Balkans, the EU promotes a rules-based, multilateral model that links regional cooperation with regulatory harmonization, institutional reforms, and accession conditionality. China, through the BRI, approaches the region as a strategic connectivity corridor, relying on bilateral partnerships, infrastructure projects, and state-backed financing without broader institutional conditionality. These approaches do not create fully separate spheres of influence. Instead, they coexist, interact, and sometimes compete, producing a regional order where institutional integration and project-based connectivity overlap. Conceptualizing the Western Balkans through intersecting regionalism allows regional cooperation during 2013–2025 to be understood as an outcome of competing geoeconomic logics rather than linear integration. Their interaction produces uneven infrastructure development, overlapping institutional frameworks, tensions between regulatory compliance and rapid project implementation, and greater room for strategic manoeuvring by domestic elites. Accordingly, Western Balkans regionalism is best understood neither through old nor new regionalism alone, but as intersecting regionalism, shaped by the simultaneous interaction of the EU’s normative integration model and China’s transactional connectivity strategy.

PROJECTS BY THE EU AND CHINA IN THE WESTERN BALKANS REGION

Infrastructure and Connectivity Projects

Chinese Loan-Financed Projects

Chinese infrastructure engagement in the Western Balkans is dominated by transport projects, financed primarily through concessional loans from the Exim Bank of China and implemented by state-owned companies such as China Road and Bridge Corporation (CRBC), China Railway International, and China Civil Engineering Construction Corporation. Consistent with China's non-interference principle, these loans generally lack political or governance conditionalities, allowing national authorities to determine development priorities (Krstinovska 2021). This model is often considered more attractive than EU, IMF, or World Bank financing because of its faster implementation. However, Chinese loans are usually tied to Chinese contractors, suppliers, and sometimes labour, limiting local economic spillovers. Procurement may also bypass EU and domestic tendering rules, while concerns persist regarding environmental standards and governance safeguards (Jovanović and Stojadinović 2025, 28–31).

The Belgrade–Budapest High-Speed Railway is the flagship Chinese infrastructure project in the region. Agreed at the 16+1 summit in Belgrade in 2014, the 350-km electrified railway is intended to reduce travel time between the two capitals from eight hours to approximately two hours and forty minutes. The 184-km Serbian section was financed by a \$1.3 billion Exim Bank loan covering 85% of costs, with the remainder provided by Serbia (Reuters 2017; Stanojević and Zakić 2023, 428–430). The project is particularly significant because it was the first to align Chinese railway technology and equipment with EU technical specifications, including the European Train Control System (ETCS) Level 2 (China Railway 2022), illustrating the hybridity of Chinese financing and construction with European standards.

The Bar–Bolja Motorway in Montenegro demonstrates both the opportunities and risks associated with Chinese financing. Secured through a €689 million Exim Bank loan in 2014, it became Montenegro's largest infrastructure project since independence. Although the loan carried relatively favourable terms (20 years, 2% interest, and a six-

year grace period), the project ultimately cost more than \$1 billion and raised concerns about economic viability and its impact on public debt (Paszak 2021). Completed in 2022 following COVID-19-related delays, the motorway contributed to Montenegro's subsequent difficulties in servicing the loan. EU assistance enabled a hedging arrangement with American and European banks, reducing exchange-rate risks and generating approximately €12.6 million in savings (Stanojević and Zakić 2023, 380–382).

Beyond these flagship projects, Chinese companies have participated in numerous transport initiatives across the region. In Serbia, these include sections of the Miloš Veliki motorway, the Belgrade–Subotica railway, and various bypasses and arterial roads, making transport the main recipient of Chinese loans (Stanojević and Zakić 2023, 433). In North Macedonia, Chinese contractors completed the Miladinovci–Štip motorway (an important segment of the Pan-European Corridor VIII), while the Kičevo–Ohrid motorway has faced cost overruns, delays, and land-expropriation problems. In Bosnia and Herzegovina, Chinese firms have worked on the Banja Luka–Prijedor motorway and sections of Corridor Vc (Balkan Investigative Reporting Network [BIRN] n.d.). Chinese participation in Albania has been more limited – expected financing for the Arbri Road and Blue Corridor did not materialise, while China Everbright Group held a stake in Tirana International Airport from 2016 to 2020 (BIRN n.d.). Together, these cases illustrate both the broad regional scope of Chinese engagement and significant variation in project outcomes.

EU-supported Transport and Connectivity Initiatives

EU infrastructure engagement follows a different logic, prioritising regional connectivity, regulatory convergence, and gradual integration into the EU economic and institutional framework. The Berlin Process (2014) and Connectivity Agenda (2015–2020) established the main framework for cooperation in transport, energy, and digital networks aligned with the Trans-European Transport (TEN-T) and Energy Networks (TEN-E). Through the Connectivity Agenda, the EU allocated more than €1 billion in IPA grants, leveraging €3.7 billion for 45 flagship projects (37 transport and 8 energy) (European Commission 2020). The Western Balkans Investment Framework (WBIF) has become the EU's principal infrastructure financing instrument. It has allocated

€4.4 billion in grants to mobilise more than €36 billion in investments and, between 2009 and 2026, supported €15.9 billion in public and €9.2 billion in private investment, contributing to the construction of 1,060 km of roads (WBIF 2025). The Economic and Investment Plan (2021–2027) subsequently committed up to €9 billion in EU funding, alongside guarantees capable of mobilising up to €20 billion, for transport and energy connectivity, digitalisation, decarbonisation, and the Green Agenda (European Commission 2020a). The Growth Plan (2024–2027) added a €6 billion Reform and Growth Facility, with at least half channelled through the WBIF. Access to these resources is conditional on country-specific Reform Agendas, reinforcing the EU's conditionality-based approach (European Commission n.d.a.).

The Economic and Investment Plan (EIP) identifies three major transport flagships. “Connecting East to West” focuses on projects such as the Peace Highway between Priština and Niš, the modernisation of Corridor X, the Serbia–Croatia rail connection, and Rail Corridor VIII, as well as improving Danube and Sava navigation. “Connecting North to South” prioritises Corridor Vc, the Belgrade–Podgorica–Bar railway, the Sarajevo–Podgorica connection, and the Belgrade–Priština railway. “Connecting the Coastal Regions” supports the Tirana–Podgorica railway, its extension to Durrës, and the Blue Highway through Albania and Montenegro (European Commission 2020a). These flagship investments collectively demonstrate that the EU's transport strategy extends beyond financing individual projects to creating a cohesive regional transport network integrated with European corridors and standards.

Comparative Assessment

As Zweers *et al.* (2020, 22) argue, infrastructure financing is the area in which China is most relevant as a potential complement or alternative to the EU in the Balkans. Although both actors are major infrastructure financiers, they differ fundamentally in financing models, implementation practices, conditionality, and strategic objectives (Table 1). The EU uses infrastructure investment as an instrument of accession-driven institutional transformation, whereas China primarily uses it to strengthen BRI connectivity and expand bilateral economic relations.

Table 1. Comparison of EU and Chinese infrastructure investment models in the Western Balkans.

Dimension	EU Approach	Chinese Approach
Financing Model	Grants + concessional loans (blending)	Predominantly loans (85% project cost)
Conditionality	Governance reforms, environmental standards, and procurement rules	Minimal political conditionality; recognition of the One China policy
Implementation Speed	Slower due to bureaucratic requirements, environmental assessments, and public procurement	Faster; state-to-state agreements bypassing standard bidding
Labor/Supply Chain	Local employment; EU-standard procurement	Chinese workers and suppliers (up to 70% of equipment from China)
Standards Alignment	Full EU <i>acquis</i> compliance	Variable; some projects align with EU standards (e.g., ETCS on Belgrade-Budapest railway)
Regional Integration Logic	Multilateral; promotes cross-border connectivity and institutional harmonization	Bilateral; connects individual capitals to Chinese trade routes

Source: Authors, based on: Jovanović and Stojadinović 2025; Stojadinović 2023; Zweers *et al.* 2020.

The most important distinction concerns conditionality. EU support combines grants and concessional loans with extensive requirements concerning procurement, transparency, environmental standards, state aid, and governance. It is also embedded within the accession process and linked to rule-of-law reforms, anti-corruption measures, human rights, and alignment with the *acquis* (European Commission n.d.). Chinese financing, by contrast, relies mainly on sovereign loans that can cover up to 85% of project costs and generally involve fewer political and institutional conditions. This flexibility and simpler approval process make Chinese financing attractive to governments seeking rapid implementation, even though Chinese loans may offer less favourable financial terms (Stojadinović 2023; Jovanović

and Stojadinović 2025, 35). The actors also differ in their conception of connectivity. EU policy follows a multilateral approach aimed at strengthening cross-border networks, regulatory harmonisation, and integration into the TEN-T and Single Market. Chinese projects are more often negotiated bilaterally and designed to support BRI trade routes and access to European markets. While projects such as the Belgrade–Budapest railway may adopt European technical standards, regulatory harmonisation is not an underlying objective of Chinese infrastructure policy.

These differences produce a hybrid rather than purely competitive pattern of infrastructure development. Chinese projects can deliver rapid physical connectivity and may become integrated into EU-planned corridors, while their operation ultimately depends on EU technical, regulatory, and institutional frameworks as Western Balkan states pursue membership. Chinese capital, therefore, increasingly operates alongside, and sometimes within, the broader EU-led regional architecture. China contributes to physical infrastructure delivery, while the EU largely defines the standards and institutional environment governing long-term regional integration.

Energy Projects

Chinese Energy Investments

Chinese energy engagement in the Western Balkans has changed significantly during 2013–2025, shifting from coal-fired power generation towards renewable energy and green technologies following China's 2021 pledge to halt overseas coal construction. Before 2021, major projects included Serbia's Kostolac B3 thermal power plant, a 350 MW unit, and Drmno mine expansion financed through a €715 million Exim Bank loan covering approximately 80% of costs (Stanojević and Zakić 2023, 430–432). In Bosnia and Herzegovina, Chinese financing supported the 300 MW Stanari thermal power plant and mine expansion through a €550 million China Development Bank loan, as well as the planned 450 MW Tuzla 7 unit, for which the Exim Bank was expected to finance 85% of the estimated €785 million cost (Stanojević and Zakić 2023, 379). In Albania, Chinese investment has focused mainly on mining and oil production, including acquisitions by Jiangxi Copper

Corporation and Geo-Jade Petroleum, although these have faced regulatory and legal challenges (BIRN n.d.).

Following the 2021 coal-financing commitment, Chinese engagement shifted towards renewables, with Serbia becoming the principal destination. In 2024, Shanghai Fengling Renewables and Zijin Mining announced a €2.2 billion investment comprising a 1,500 MW wind farm, a 500 MW solar plant, and green hydrogen production intended partly to decarbonise copper mining operations in Bor. In 2023, Serbia also signed an MoU with Hunan Rich Photovoltaic Science and Technology for a 1 GW solar-panel manufacturing facility and an adjacent 200 MW solar plant (Balkan Green Energy News 2024). Montenegro has attracted Chinese involvement in solar and wind projects and in the ecological modernisation of the Pljevlja thermal power plant, while Chinese energy investment in North Macedonia remains limited and concentrated mainly in metallurgy (Yoneva 2023).

This green pivot brings Chinese investment closer to EU decarbonisation priorities, but concerns over technological dependency remain. Chinese renewable projects are often delivered as “turnkey packages” involving Chinese equipment, control software, and maintenance services, potentially creating long-term dependence on Chinese suppliers (Lipke, Oertel, and O’Sullivan 2024; Maremonti 2024). Overall, the country overview indicates that while China has established a regional presence across the Western Balkans, the extent and nature of its energy engagement differ significantly based on domestic political circumstances, investment prospects, and the priorities of the host countries.

EU Energy Initiatives

EU energy engagement is primarily structured through the Energy Community, the Green Agenda for the Western Balkans, and the Economic and Investment Plan, which together seek to integrate the region into the EU internal energy market while promoting decarbonisation, energy security, and renewable energy. The Energy Community Treaty requires Western Balkan partners to align with the EU energy acquis, including the Third Energy Package, Clean Energy Package, and Electricity Integration Package. Progress remains uneven: in 2025, compliance reached 63% in Serbia, 53% in Montenegro, 56%

in North Macedonia, 46% in Kosovo*, and only 26% in Bosnia and Herzegovina (Energy Community n.d.). These differences illustrate both the transformative influence of the Energy Community framework and the varying domestic capacities to implement EU energy reforms.

The EU has complemented regulatory integration with substantial financial support. The 2022 Energy Support Package allocated €1 billion through the WBIF for renewable energy, energy efficiency, and cross-border infrastructure (WBIF 2022). The Regional Energy Efficiency Programme (REEP), implemented by the EBRD and Energy Community Secretariat, has mobilised approximately €1.1 billion since 2013, including €184.6 million in EU grants and €982 million in IFI loans (WBIF n.d.). Through Projects of Energy Community Interest (PECI), the Energy Community promotes strategic cross-border infrastructure designed to strengthen electricity transmission networks, improve system flexibility, and facilitate renewable energy integration.

Electricity-market integration is pursued through the Western Balkans Six (WB6) initiative, which promotes regional electricity markets compatible with EU rules through regulatory harmonisation, day-ahead markets, and cross-border balancing mechanisms. Proposed market-coupling projects include links between Serbia and Hungary, Slovakia, the Czech Republic, and Romania, integrating Albania, Montenegro, Serbia, and Italy through the Italy–Montenegro submarine cable, and future couplings involving Bosnia and Herzegovina, Croatia, Montenegro, and Serbia, as well as Albania and Greece (Balkan Green Energy News 2018). The EIP further supports the energy transition through three flagships: Flagship 4 (Renewable Energy), Flagship 5 (Transition from Coal), and Flagship 6 (Renovation Wave). Together, they promote renewable-energy expansion, coal phase-out, modern energy infrastructure, and energy-efficient building renovation (European Commission 2020a).

Comparative Assessment

The energy sector reveals a more complex interaction between the EU and China than transport infrastructure because Chinese investment increasingly operates within a policy environment shaped by the EU.

* This designation is without prejudice to positions on status and is in line with UNSCR 1244/99 and the ICJ Opinion on the Kosovo declaration of independence.

While the EU exercises influence through regulatory harmonisation, market integration, and financial support for decarbonisation, China has adopted a more project-oriented approach centred on infrastructure financing and technology deployment. Before 2021, these approaches frequently diverged, as Chinese support for coal-fired power plants in Serbia and Bosnia and Herzegovina conflicted with the EU’s decarbonisation objectives. Following China’s decision to end financing for new overseas coal plants, Chinese engagement increasingly converged with EU priorities through renewable energy, solar manufacturing, wind power, and green hydrogen (Table 2).

Table 2. Comparative analysis of EU and Chinese energy engagement in the Western Balkans

EU action	China action	Comparative effect
Promotes regulatory harmonisation and alignment with the EU acquis.	Pursues bilateral project implementation.	EU shapes the governance framework; China operates within it.
Supports market integration and institutional convergence.	Prioritises infrastructure delivery and commercial execution.	EU seeks structural reform; China seeks rapid project completion.
Uses financial instruments to support decarbonisation.	Provides direct investment in energy infrastructure and technology.	EU funds systemic transition; China funds concrete assets.
Advances Energy Community-based integration and rule-setting.	Favors turnkey projects and state-led cooperation.	EU deepens institutional embedding; China preserves investment flexibility.
Opposes coal expansion and promotes decarbonisation.	Shifted from coal financing to renewables, hydrogen, solar, and wind.	Earlier divergence has narrowed into partial convergence.
Seeks reduced dependency through diversified, rules-based integration.	May generate dependence on Chinese hardware, software, and maintenance.	Convergence is offset by strategic dependence risks.

Source: Authors.

However, this convergence remains only partial. The EU seeks long-term institutional and market integration through the Energy Community, regional electricity markets, and instruments such as the EIP and REEP, while China continues to favour bilateral, largely turnkey projects. Consequently, the two actors increasingly support similar objectives, particularly renewable-energy expansion and decarbonisation, but pursue them through different governance models. The EU promotes institutional convergence and regulatory integration, whereas China emphasises infrastructure delivery and industrial cooperation, creating potential technological dependence on Chinese equipment and services. Energy, therefore, represents both growing complementarity and persistent strategic competition, with Chinese investments increasingly adapting to an EU-shaped regulatory environment without fundamentally altering their state-led investment model.

EU-CHINA GEOECONOMIC INTERACTION AND THE MAKING OF A LAYERED REGIONAL ORDER

As argued in the theoretical framework, regionalism in the Western Balkans cannot be adequately understood either as a conventional process of regional integration or as a manifestation of institutional fragmentation. Rather, it represents a layered regional order in which multiple institutional arrangements, governance frameworks, and external actors coexist and interact. The empirical findings demonstrate that this complexity cannot be explained through approaches that conceptualise regional cooperation as either exclusively EU-driven or shaped by competing external influences. Instead, the Western Balkans represent a case of intersecting regionalism, where distinct geoeconomic logics coexist, interact, and become embedded within the same geographical and institutional space. The interaction between the EU's rules-based model of regional integration and China's connectivity-oriented engagement, primarily operationalised through bilateral infrastructure financing and project-based cooperation, has produced differentiated but interconnected forms of regional cooperation. The findings, therefore, challenge interpretations of Western Balkans regionalism as a linear process driven exclusively by the EU integration. While the EU remains the dominant source of institutional frameworks, legal norms, and regulatory standards through accession

conditionality, regulatory harmonisation, and multilateral governance mechanisms such as CEFTA 2006, the Energy Community, the Transport Community, and the Berlin Process, China has emerged as a significant geoeconomic actor influencing the material conditions under which regional cooperation unfolds. This reflects the externally anchored nature of Western Balkans regionalism identified in the theoretical section, where regional cooperation develops through the interaction of external actors and regional institutions rather than through purely endogenous dynamics.

The transport sector provides the clearest illustration of intersecting regionalism. EU policies and investments continue to organise regional transport cooperation around integration into the Trans-European Transport Network (TEN-T), regulatory convergence, and accession-related reforms. Chinese engagement follows a different logic, relying primarily on bilateral financing and strategically selected infrastructure projects associated with the Belt and Road Initiative. However, these projects have not generated an alternative regional transport order. Instead, major infrastructure investments, including the Belgrade–Budapest railway, have become increasingly incorporated into broader European transport corridors and subject to EU technical and interoperability standards. Physical connectivity is therefore increasingly supported by Chinese capital, while the institutional framework governing regional transport remains predominantly shaped by European rules. Rather than displacing EU-led regional integration, Chinese infrastructure engagement becomes embedded within existing European frameworks. A similar but more asymmetrical pattern can be observed in the energy sector. Here, EU influence remains considerably stronger due to the central role of the Energy Community and the gradual adoption of the EU energy acquis. China's earlier engagement in coal-fired power generation reflected a geoeconomic logic that diverged from the EU's decarbonisation agenda, demonstrating that intersecting regionalism involves not only complementarity but also competing policy preferences. Following China's decision to end financing for new overseas coal projects, Chinese engagement increasingly shifted towards renewable energy. Nevertheless, convergence remains limited because the underlying governance models continue to differ. The EU promotes market liberalisation, regulatory harmonisation, and institution-building, whereas China's engagement relies predominantly on bilateral financing arrangements, state-led implementation, and technological cooperation.

Consequently, Chinese renewable energy projects operate within an institutional environment structured by European regulatory frameworks without fundamentally transforming those frameworks.

These sectoral variations reveal a central characteristic of intersecting regionalism. The concept does not imply convergence between EU and Chinese approaches, nor does it suggest the emergence of a unified model of regional governance. Instead, regional cooperation develops through the coexistence of complementary and competing modes of external engagement. The EU remains the dominant institutional and regulatory actor, providing legal frameworks, governance standards, and mechanisms of conditionality. China, by contrast, primarily contributes infrastructure financing, connectivity capacity, and industrial cooperation. The result is neither a replacement of one regional order by another nor a simple competition between two external models, but rather a layered regional configuration in which different forms of influence operate simultaneously.

The findings further demonstrate that intersecting regionalism varies considerably across sectors and countries. Transport has proven more receptive to Chinese project-based financing because infrastructure development generally encounters fewer regulatory constraints than sectors dependent on continuous market governance and institutional harmonisation. Energy, by contrast, remains more deeply embedded within multilateral regulatory structures, making compatibility with Chinese investment conditional upon alignment with European standards. At the country level, different patterns of external engagement produce distinct configurations of intersecting regionalism. Serbia represents the most visible case, given the simultaneous presence of extensive Chinese infrastructure engagement and continued participation in EU-led regional frameworks. Montenegro follows a more balanced trajectory, where substantial Chinese financing has increasingly been complemented by renewed EU support and regulatory alignment. Albania and North Macedonia, by contrast, remain more firmly anchored within EU institutional frameworks while maintaining selective economic engagement with China.

The implications of this regional configuration are inherently mixed. Chinese investment has contributed to accelerating infrastructure development and strengthening regional connectivity by addressing financing gaps that EU instruments have often been unable to address with comparable speed. At the same time, its predominantly bilateral and

project-oriented character may reinforce institutional fragmentation by prioritising nationally negotiated arrangements over coordinated regional planning. Conversely, EU initiatives such as the Berlin Process and the Growth Plan for the Western Balkans aim to strengthen multilateral governance, regulatory convergence, and regional ownership. Yet the prolonged nature of the accession process continues to create opportunities for alternative sources of financing and connectivity. Consequently, the Western Balkans should not be understood as a region simply caught between competing external influences. Rather, it represents a space where multiple forms of regional ordering interact and become mutually embedded. Intersecting regionalism captures this condition by explaining how institutional authority, regulatory influence, and material connectivity can be produced by different actors without necessarily resulting in institutional convergence. The Western Balkans, therefore, illustrate a broader transformation of regional cooperation in which external actors do not merely compete for influence but contribute to the emergence of complex and layered regional orders.

CONCLUSION

This article has examined how the competing geoeconomic logics of the EU and China have shaped regionalism in the Western Balkans between 2013 and 2025, focusing on a central question: do competing external influences foster regional integration or deepen fragmentation across the Western Balkans? The research showed that, rather than producing competing regional orders, their interaction has generated a model of intersecting regionalism, in which EU-led institutional integration and Chinese project-based connectivity coexist, interact, and occasionally compete. Three main findings emerged from our analysis. First, intersecting regionalism is structurally embedded rather than transitional, reflecting enduring differences in the geoeconomic strategies of the two actors. Second, its effects are sectorally differentiated. Transport has become the principal arena of Chinese project-based engagement, whereas energy remains more firmly anchored in EU regulatory governance, demonstrating that competing external influences produce uneven regional outcomes across policy sectors. Third, intersecting regionalism varies across countries, with Serbia representing the most pronounced case of combined engagement

with both actors, while the remaining Western Balkan states remain more closely aligned with EU-centred institutional integration.

The concept of intersecting regionalism contributes to the regionalism literature by moving beyond the old-new regionalism dichotomy and conceptualizing the Western Balkans as a layered regional space shaped by overlapping external geoeconomic logics. These findings also carry important policy implications, highlighting the need to balance bilateral infrastructure investment with multilateral institutional development while mitigating the risks of fragmentation and dependency. Ultimately, the Western Balkans emerges not simply as an object of geopolitical competition but as a region where competing geoeconomic logics are continuously negotiated and institutionalized through intersecting forms of regional governance.

Note: An artificial intelligence-based language editing tool was used solely for stylistic editing of the English language throughout the manuscript. All scientific content, analyses, interpretations, and conclusions were written by the authors, who take full responsibility for the manuscript.

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СУПРОТСТАВЉЕНЕ ГЕОЕКОНОМСКЕ ЛОГИКЕ: УТИЦАЈ ЕУ И КИНЕ НА РЕГИОНАЛИЗАМ ЗАПАДНОГ БАЛКАНА ОД 2013. ДО 2025. ГОДИНЕ***

Резиме

Овај рад анализира на који начин су различите геоекономске логике Европске уније и Кине обликовале регионализам на Западном Балкану у периоду од 2013. до 2025. године. Полазећи од питања да ли конкурентски спољни утицаји подстичу регионалну интеграцију или продубљују регионалну фрагментацију, рад одбацује поједностављено схватање спољног деловања као искључиво интегративног или дестабилизујућег. Основна теза је да интеракција регулаторног и тржишно оријентисаног модела ЕУ и кинеског приступа заснованог на инфраструктурним пројектима, кредитном финансирању и билатералној сарадњи доводи до формирања специфичног обрасца „пресецајућег регионализма“, у којем се различити облици регионалне сарадње истовремено прожимају и функционишу у оквиру истог географског и институционалног простора. Теоријски оквир заснива се на компаративној анализи геоекономских логика два актера. Док ЕУ регионалну сарадњу обликује кроз политику условљавања, регулаторну хармонизацију и мултилатералне институционалне механизме, Кина своје присуство гради посредством пројектно оријентисаних инвестиција, кредитног финансирања и билатералних аранжмана у оквиру Иницијативе

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*** Рад је настао у оквиру научноистраживачког пројекта „Србија и изазови у међународним односима 2026. године“, који финансира Министарство науке, технолошког развоја и иновација Републике Србије, а реализује Институт за међународну политику и привреду током 2026. године.

Појас и пут. Емпиријски део рада усмерен је на саобраћајну инфраструктуру и енергетику, кроз анализу пројеката реализованих у периоду од 2013. до 2025. године. Резултати показују да се регионална сарадња на Западном Балкану не може разумети као линеаран процес који искључиво предводи ЕУ. Иако ЕУ остаје кључни носилац институционалне интеграције кроз механизме као што су ЦЕФТА 2006, Енергетска заједница, Транспортна заједница и Берлински процес, Кина се афирмисала као значајан геоекономски актер финансирањем великих инфраструктурних пројеката који доприносе регионалној повезаности. Уместо формирања паралелних регионалних поредака, деловање ова два актера доводи до њиховог преплитања и стварања различитих, али међусобно повезаних облика регионалне сарадње. Најизраженији пример пресецајућег регионализма уочава се у сектору саобраћаја. ЕУ усмерава транспортну сарадњу кроз регулаторну конвергенцију, интеграцију у Трансевропску транспортну мрежу и реформе повезане са процесом приступања, док Кина финансира стратешки значајне инфраструктурне пројекте путем билатералних споразума. Иако се реализују уз кинески капитал и ангажовање кинеских компанија, такви пројекти се постепено уклапају у европске транспортне коридоре и прилагођавају стандардима ЕУ. Кинеске инвестиције тако доприносе физичкој повезаности региона, док институционални оквир транспорта остаје превасходно европски. У сектору енергетике интеракција показује већи степен асиметричности. ЕУ задржава доминантан институционални утицај посредством Енергетске заједнице, док су почетне кинеске инвестиције у термоелектране на угаљ одражавале развојни модел супротстављен европској политици декарбонизације. Након престанка финансирања нових термоелектрана на угаљ у иностранству, кинески ангажман се све више усмерава ка обновљивим изворима енергије. Ипак, модели управљања остају различити, будући да ЕУ ставља нагласак на либерализацију тржишта, регулаторну хармонизацију и институционални развој, док се Кина ослања на билатерално финансирање, државно вођену реализацију пројеката и технолошку сарадњу. Истраживање показује да је пресецајући регионализам неуједначен по секторима и међу економијама Западног Балкана. Саобраћај је отворенији за кинеске инвестиције од енергетике, која је чвршће интегрисана у европски регулаторни оквир. На нивоу

појединачних држава, Србија представља најизраженији пример истовременог деловања обе геоекономске логике, док су остале економије региона, у различитом степену, снажније усмерене ка институционалним оквирима ЕУ. Рад закључује да интеракција ЕУ и Кине није довела до успостављања конкурентских регионалних поредака, већ до развоја модела пресецајућег регионализма који карактерише истовремено деловање комплементарних и конкурентских геоекономских логика. Концепт пресецајућег регионализма представља допринос литератури о регионализму јер Западни Балкан сагледава као слојевит регионални простор обликован преклапањем различитих спољних геоекономских утицаја. Истовремено, резултати указују на значај усклађивања билатералних инфраструктурних инвестиција са мултилатералним институционалним развојем ради јачања регионалне сарадње и смањења ризика од фрагментације и зависности.

Кључне речи: Западни Балкан, геоекономија, регионализам, Европска унија, Кина, инфраструктурна повезаност, енергетско управљање

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FROM EMERGENT TO GRAND STRATEGY: THE ABSENCE OF REFLEXIVITY IN IONUT POPESCU'S THEORETICAL SHIFT IN THE ANALYSIS OF TRUMP'S FOREIGN POLICY

Abstract

This paper examines in detail the theoretical shift of Ionut Popescu in interpreting the foreign policy of Donald Trump over eight years (2017–2025). Starting from the insight that authors change their views under the influence of their own theoretical frameworks, the paper focuses on the issue of reflexivity – the author's ability to re-examine his own assumptions and to explicitly explain changes in his position. Through a systematic review of Popescu's works (books, academic articles, and texts in influential periodicals), four chronological phases are distinguished. The first phase (2010–2017) covers the introduction and operationalization of the concept of emergent strategy, with a consistent application of a contextual framework. The second phase (2018) brings sharp contradictions – simultaneously advocating a grand strategy (in two works) and denying the need for it (in the *Foreign Affairs* article), without any explanation. The third phase (2019–2020) is characterised by the introduction of offensive realism while retaining emergent strategy, accompanied by partial, but incomplete, reflexivity. The fourth phase (2022–2025) culminates in the abandonment of his own contextual framework and a shift to a universal advocacy of offensive realism, without any justification. The paper shows that Popescu does

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not explain his theoretical shift, does not acknowledge contradictions within the same year, and selectively applies criteria, which indicates a multiple absence of reflexivity. Consequently, the reader remains permanently deprived of the reasons that led Popescu to make his shift from advocating emergent strategy to universally affirming offensive realism within grand strategy. It is precisely this unexplained nature of the shift that makes this case particularly instructive for the discipline of international relations: it warns that one's own theoretical framework can be presented as the only correct view of reality, but also that key theoretical changes can occur in complete silence. This underscores the need for greater methodological self-awareness in foreign policy research.

Keywords: grand strategy, emergent strategy, reflexivity, Ionut Popescu, Trump, foreign policy

INTRODUCTION

One of the most current academic topics in the fields of political and security sciences concerns the decisions that the current US President Donald Trump is making in foreign policy. The dilemma of whether his foreign policy is based on any strategy at all – and if so, what kind – has become one of the most frequently discussed questions in the contemporary literature. While some authors believe Trump acts without a coherent plan (Haass 2017; Lissner and Zenko 2017), others recognize the contours of a grand strategy in his actions, advocating a realist approach (Kroenig 2017; Schweller 2018, Trapara 2026).

What is less often emphasized in these debates is that authors themselves change their views over time, and that their interpretations of Trump's policy are not merely a reflection of changes in Trump's behavior, but also of changes in their own theoretical frameworks. Among the most productive authors in this field is Ionut C. Popescu. Over eight years (2017–2025) he has published two books on the subject (Popescu 2017b; 2025a), as well as a number of works – both academic, peer-reviewed articles in prestigious American journals such as the *Journal of Strategic Studies*, *Political Science Quarterly*, *Orbis*, *Parameters*, and non-peer-reviewed texts in influential American

magazines such as *Foreign Affairs*, *The National Interest* and *The American Conservative*.

An analysis of this body of work makes it possible to trace his theoretical shift: from a consistent advocacy of emergent strategy (strategy in the making), which emphasizes improvisation, learning, and adaptation, to a complete acceptance of offensive realism as the only correct grand strategy for the United States. However, the most significant change is not only in the type of strategy he attributes to Trump, but in his very attitude toward the concept of grand strategy itself: in 2018 Popescu argued that Trump “doesn’t need a grand strategy” (Popescu 2018b), while in 2025 he declares not only that Trump “has” a grand strategy, but also that it is “necessary” (Popescu 2025a; 2025b).

This, of course, does not mean that a change in theoretical position is in itself a bad thing. The development of theory is impossible without academic debate, constructive criticism, the confrontation of arguments with counter-arguments, and without a methodological practice that implies a critical re-examination of one’s own theoretical standpoints. That is why the absence of reflexivity is what can be criticised in Popescu’s case. This criticism is not directed at the author’s personal integrity, but at a theoretical-methodological shortcoming that is indicative, and not so rare, in disciplines that study the foreign and security policies of states, especially in real-time research, i.e., in cases where the phenomenon and the research are simultaneous, and where the phenomenon has not yet assumed its final form.

Thus, Popescu is not alone in this kind of theoretical shift. Similar changes can be observed in other authors as well (Brands 2014; 2018; Walt 2018). Nevertheless, Popescu’s theoretical trajectory provides a particularly useful case through which to examine the relationship between theoretical frameworks, empirical interpretation, and scholarly reflexivity. This shift is particularly visible in Popescu’s changing interpretation of Trump’s foreign policy: in 2018, he emphasised “improvisation and adaptation” (Popescu 2018b), whereas seven years later he interpreted Trump’s conduct through the lens of a “coherent grand strategy” (Popescu 2025b). Moreover, he neither explains the reasons for this shift nor explicitly acknowledges that his theoretical position has changed.

The choice of Popescu as a case study, therefore, does not depend on his being regarded as one of the most influential or prominent scholars of US grand strategy. Nor is the purpose to suggest that his theoretical

trajectory is representative of the discipline as a whole. Rather, Popescu is selected because his intellectual trajectory provides an unusually suitable case for examining academic reflexivity in real-time foreign policy research. Three features make his intellectual trajectory particularly suitable for this analysis. First, he explicitly transposed and adapted the concept of emergent strategy from the business-strategy literature to the study of international relations and foreign policy, and developed a contextual framework for determining when grand strategy or emergent strategy is more appropriate. This makes it possible to examine his later interpretations against theoretical criteria that he himself had previously established. Second, his writings offer a sufficiently long and internally connected temporal sequence – from his early engagement with emergent strategy, through its application to Trump, to his later endorsement of offensive realism – that makes it possible to trace theoretical change within the work of a single scholar. Third, and most importantly, the object of this study is not Popescu's influence, but the relationship between theoretical frameworks, empirical interpretation, and scholarly reflexivity. His case is particularly revealing because the principles that he placed at the centre of his adapted theoretical framework – contextual sensitivity, learning, adaptation, and the rejection of a priori assumptions about the superiority of one strategic model – provide precisely the criteria against which his later theoretical transformation can be examined. In this sense, Popescu is analytically valuable not because he represents the canonical mainstream of the field, but because his corpus allows the dynamics of theoretical transformation and reflexivity to be observed with unusual clarity within a bounded and traceable case.

This absence of reflexivity is not one-dimensional. It manifests itself on at least four levels: (1) through inconsistency in the application of his own theoretical concepts over time; (2) through obvious contradictions between texts published in the same year (January 2018 vs. May 2018; February 2020 vs. September 2020); (3) through the selective application of criteria – when he criticises other authors (e.g., Miller and Rubinovitz cited in: Popescu 2022a) for something he himself does, without linking his own writing to those criticisms; and finally (4) through the abandonment of his own theoretical framework, which he had presented in 2017, and in which he explicitly demanded that the choice between grand and emergent strategy be based on four contextual criteria (predictability of the external environment, time horizon, domestic political polarisation, and style of bureaucratic management).

In 2025, Popescu completely ignores this framework and advocates offensive realism as a universal solution, without explaining why his earlier criteria no longer apply.

All the above makes Popescu's case particularly instructive for analysis. The aim of this paper is to highlight, through a systematic analysis of his works (from 2010 to 2025), the multiple absences of reflexivity and to show that the author's theoretical shift cannot be explained exclusively by changes in the phenomenon under study – i.e., in the foreign policy behaviour of President Trump – but primarily by changes in the theoretical frameworks applied. The paper is organised as follows: after the introduction, a detailed analysis follows through four chronological phases, then a critical synthesis based on three criteria (theoretical consistency, empirical grounding, and reflexivity), and finally a conclusion with implications for the discipline and open questions for further research.

FOUR PHASES OF IONUT POPESCU'S THEORETICAL SHIFT

The analysis of Popescu's works makes it possible to distinguish four chronological phases that illuminate the changes in his positions and his final theoretical shift. The division is based on three criteria: (a) changes in relation to the concept of grand strategy (from advocating emergent strategy towards an offensive realist framework); (b) consistency in the application of his own theoretical criteria; (c) the presence (or absence) of reflexivity, particularly in the form of acknowledging his own change of view or confronting contradictions within the same phase.

The first phase (2010–2017) covers the early academic works and the book *Emergent Strategy and Grand Strategy*, in which Popescu takes over and adapts the theoretical framework and, for the first time, analyses Trump's foreign policy, linking it to emergent strategy. The second phase (2018) brings sharp contradictions – a complete reversal of his previous theoretical position, accompanied by an absence of reflexivity, simultaneously advocating a grand strategy in two works and then denying the need for a grand strategy (Popescu 2018b). The third phase (2019–2020) is characterised by the introduction of offensive realism while retaining emergent strategy, along with partial reflexivity and the first signs of selective criticism of other authors. The

fourth phase (2022–2025) culminates in the abandonment of his own theoretical framework and a shift to a universal advocacy of offensive realism within the grand-strategy framework, with the expected absence of reflexivity.

Phase 1 (2010–2017): Transplanting and Adapting the Concept of Emergent Strategy

The first phase covers the period from his early academic works (2010, 2016) to the article *Grand Strategy vs. Emergent Strategy* (Popescu 2017a) and the book *Emergent Strategy and Grand Strategy* (Popescu 2017b). During this period, Popescu consistently develops a contextual framework for choosing between grand and emergent strategies. When he finally turns to Trump's policy in 2017, he does so in a completely consistent way – he advocates emergent strategy, emphasises learning and adaptation, and shows no need for reflexivity (since he does not change his own theoretical position).

Already in the review essay published in *Orbis* (2010), Popescu critically treats the entrenched belief that good strategy necessarily results from formal, centralised planning. Referring to contemporary studies by Drezner, Rodman, Daalder, and Destler, but also Haass, he points to the complex relationship between the process of strategy making and its final outcomes. On that occasion, for the first time in his academic career, he introduces Mintzberg's distinction between deliberate and emergent strategy: "One of the core insights of the corporate strategy literature is business theorist Henry Mintzberg's contention that 'Strategy formulation walks on two feet, one deliberate, the other emergent'" (Popescu 2010, 660). Emphasising that strategy "sometimes emerges from a process of trial-and-error and organizational learning rather than being the product of careful deliberations and planning done beforehand," Popescu, already at that stage, lays the foundations for his later affirmation of the emergent approach (Popescu 2010, 661).

A more concrete adaptation of the theoretical framework occurs in the article "Strategic Uncertainty, the Third Offset, and US Grand Strategy" (Popescu 2016). Relying on concepts developed in business management, Popescu distinguishes four levels of uncertainty and recommends an appropriate strategic approach for each. Under stable, predictable conditions (Level 1), classical planned planning can yield

good results. As uncertainty increases (Levels 3 and 4), emergent strategy becomes increasingly preferable. Referring again to Mintzberg's viewpoint, Popescu states that "in conditions of high uncertainty short-term goals should be prioritised [...] the strategist would be more of 'a pattern recognizer' and 'a learner,' as opposed to a 'designer'" (Popescu 2016, 79).

The culmination of Popescu's theoretical contribution in the first phase is the article *Grand Strategy vs. Emergent Strategy in the Conduct of Foreign Policy* (2017a) and the book *Emergent Strategy and Grand Strategy* (2017b), published the same year. In these works, Popescu systematically sets out four criteria that should determine when it is desirable to follow a grand strategy and when an emergent strategy: (1) predictability of the external environment – the greater the uncertainty, the more suitable emergent strategy becomes; (2) time horizon – long term goals favour a grand strategy, short term and incremental goals favour an emergent strategy; (3) domestic political environment – the existence of a broad consensus favours a grand strategy, high polarisation favours an emergent strategy; (4) style of bureaucratic management – a centralised, hierarchical style suits a grand strategy, while a decentralised, flexible style suits an emergent strategy (Popescu 2017a, 446–453). It is particularly important to note that at this stage Popescu does not claim that either approach is a priori better; rather, success depends on context: "Success (or failure) could come from either Grand Strategy or Emergent Strategy, and therefore an administration's successes and failures must be judged primarily by analyzing the results of its actions, not its plans, and by analyzing how well they adapted to unforeseen circumstances and how well they learned from their mistakes" (Popescu 2017a, 455).

Although Trump is only sporadically mentioned in the article *Grand Strategy vs. Emergent Strategy*, Popescu deals with his policy more extensively in the book *Emergent Strategy and Grand Strategy* (chapter *Strategy Design and Emergence in the Trump Era*). There, he distinguishes two prevailing criticisms of Trump's approach: those who claim that Trump has no strategy at all (Lissner and Zenko 2017) and those who claim that he has a bad strategy (Brands and others). Popescu takes a third position: "Trump's style resembles an emergent strategy, but his success will depend on whether he is able to learn and adapt" (Popescu 2017b, X; 176). At the same time, he does not hide his criticism of some of Trump's positions (regarding NATO, Russia, and

the promotion of values), but concludes that the ability to learn and adapt will be decisive.

Ionut Popescu does not create the concept of emergent strategy “from scratch” in this phase; he transplants it from business management into political science and adapts it to make it applicable in the analysis of foreign policy, while simultaneously emphasising the differences from grand strategy. The findings presented in this phase indicate that Popescu is fully consistent with his theoretical framework, and that there are no signs that he will later abandon it. Precisely because he possessed these analytical abilities already at the beginning of his career, his later absence of reflexivity becomes particularly striking and theoretically-methodologically problematic.

Phase 2 (2017–2018): Affirming Grand Strategy, Contradictions, and the First Absence of Reflexivity

The period from April 2017 to May 2018 represents the first turning point. In this short span of time, Popescu publishes four works that, taken together, reveal contradictory views on whether President Trump should have a grand strategy. In the first three texts: *Trump and Emergent Strategy: The First 100 Days* (Popescu 2017c), *Conservative Internationalism and the Trump Administration?* (Popescu 2018a) (online December 2017, printed January 2018), and the co-authored article with Ian Ona Johnson, *The Missing Element in Trump’s NSS: A Competitive Strategy* (Johnson and Popescu 2018), Popescu advocates a grand strategy, i.e., he argues that Trump’s foreign policy contains elements of a grand strategy. In his probably most famous article, *Trump Doesn’t Need a Grand Strategy: Why Planning is Overrated* (*Foreign Affairs*, May 2018), however, he argues that Trump “doesn’t need a grand strategy” and that an emergent strategy is perfectly sufficient (Popescu 2018b). Popescu never explained these contradictions, nor did he show that he had even noticed them.

In his conceptualisation of conservative internationalism, Popescu draws primarily on the work of Henry Nau, Colin Dueck, and other scholars associated with this tradition. As he presents it, the approach combines a strong US international role with an emphasis on national sovereignty, military supremacy, and the pursuit of clearly defined national interests (Nau 2017 cited in: Popescu 2018a, 98; Dueck 2017 cited in: Popescu 2018a, 100). In Popescu’s presentation, conservative

internationalists are sceptical of extensive international institutions and projects of global governance, favouring instead a world of sovereign states that cooperate where their interests overlap while remaining primarily responsible for their own defence and economic affairs (Nau 2017 cited in: Popescu 2018a, 98). At the same time, Popescu stresses that conservative internationalism is not reducible to a purely material conception of power: military and economic strength should also serve to advance American values and sustain a favourable international order, captured in the idea of a “balance of power that favors freedom” (Popescu 2018a, 102). The approach also reflects a distinctly Clausewitzian understanding of the relationship between force and diplomacy: conservative internationalists view the willingness to use force as a means of increasing the US leverage in negotiations and argue that, when force is employed, it should be used decisively and without unnecessarily constraining military or intelligence operations (Popescu 2018a, 99). Thus, in Popescu’s conceptualisation, conservative internationalism combines an emphasis on power and national interests with what he describes as a distinctively American realism, in which power is placed “in the wise service of freedom” (Bromund, Auslin and Dueck 2017 cited in: Popescu 2018a, 102).

Against this conceptual background, in *Conservative Internationalism and the Trump Administration?*, Popescu sets out seven principles of this approach and concludes that, despite problematic rhetoric, Trump nevertheless follows a conservative-internationalist framework in his key moves (Syria, Afghanistan, NATO, North Korea) (Popescu 2018a). Moreover, he explicitly praises Trump’s emergent style of learning and adaptation: “Less than a year into his tenure, it is obvious that Trump’s management style relies less on long-term strategic designs and more on improvisation and learning” (Popescu 2018a, 92). Referring to his 2017 book, Popescu simultaneously advocates a grand strategy and affirms an emergent strategy, without noticing the tension between the two approaches. He repeats the same conclusion in the text *Trump and Emergent Strategy* (Popescu 2017c).

It is evident that Popescu considered this conclusion about Trump’s emergent style important enough to repeat it in two separate texts. However, while simultaneously advocating conservative internationalism as a grand strategy, he nowhere explains how these two claims can be reconciled, that Trump’s management style follows an emergent strategy, and that his policy fits into a conservative-

internationalist framework. Such an omission is not a mere oversight but an indicator of the absence of reflexivity.

The co-authored article with Johnson (January 2018) analyses the then newly released National Security Strategy (NSS). The authors praise the NSS for recognising the return of intense great-power competition, but point out that it lacks what Andrew Marshall and his Office of Net Assessment called “Competitive Strategy.” Johnson and Popescu advocate precisely what can be described as a grand strategy: setting clear priorities, focusing on China, economic decoupling, energy dominance, and strengthening alliances (Johnson and Popescu 2018). Notably, there is no mention of emergent strategy here – on the contrary, the authors argue for deliberate, centralised planning, concluding that “The new NSS signals a sea change in American strategy. Making it work will require the sort of long-term thinking pioneered by Andy Marshall and the Office of Net Assessment” (Johnson and Popescu 2018).

This position is directly opposite to the view expressed only a few months later in *Foreign Affairs*, where Popescu argues that Trump “doesn’t need a grand strategy” and that an emergent approach is sufficient. In that article, he repeats the importance of emergent strategy: “The important thing is not to plan but to learn” (Popescu 2018b). He also offers an assessment (though with some reserve) of whether the administration is actually learning and adapting: “Do these shifts on North Korea and Russia show the administration is learning and adapting, as opposed to simply engaging in ad hoc guesswork? Maybe” (Popescu 2018b). Here we are not dealing merely with a description – “Trump has no grand strategy” – but with a prescription: “President Trump doesn’t need a grand strategy. He needs to learn and adapt – and that is exactly what emergent strategy is about” (Popescu 2018b). Thus, the contradiction with his earlier texts (in which he advocated a grand strategy) becomes even more obvious.

At the same time, Popescu does not mention his previous works from the same year, does not explain such a sudden change of stance in such a short period, and does not link his texts together. A reader who read only the *Foreign Affairs* article would get the impression that Popescu consistently advocates an emergent approach, not knowing that only a few months earlier, he had written in favour of a grand strategy. This is the first unambiguous manifestation of the absence of reflexivity in Popescu. He certainly shows basic academic correctness in terms

of self-citation (e.g., in the 2018a article, he cites 2017c), but he lacks the ability to recognise and explain his own contradictory positions. This failure to acknowledge his own contradictions is not a one-time oversight – it will be repeated in the following phases, culminating in the complete abandonment of his own theoretical framework in 2025.

Phase 3 (2019–2020): Introduction of Offensive Realism, Partial Reflexivity, and Continuation of Contradictions

One year after the contradictory texts of 2018, Popescu published an article in the prestigious journal *Political Science Quarterly* entitled *American Grand Strategy and the Rise of Offensive Realism* (2019). This is a turning point – he introduces offensive realism as a normative framework, but simultaneously continues to advocate emergent strategy and does not claim that Trump has a grand strategy. Popescu begins the article with the thesis that the United States should adopt offensive realism instead of liberal internationalism (“deep engagement”) or defensive realism (“restraint”) (Popescu 2019, 377). He sets out four pillars of offensive realism – focus on revisionist powers (China and Russia), military preponderance, the zero-sum nature of international politics, and the priority of hard power – and analyses the extent to which the Trump administration fits into them (Popescu 2019, 383–401).

Crucial for understanding his later shift is what Popescu does not claim in this article. He still advocates emergent strategy: “reliance on emergent strategy based on learning and adaptation is more likely to succeed than the pursuit of a coherent long-term grand strategic design” (Popescu 2019, 377). He describes Trump’s policy as an “offensive realist emergent strategy,” that is, as an emergent strategy placed within an offensive-realist framework (Popescu 2019, 381; 401). Thus, Popescu does not claim that Trump has a grand strategy; on the contrary, he emphasises that the shift in that direction is still incomplete (“this shift is incomplete” – Popescu 2019, 381).

As regards reflexivity, Popescu shows basic academic correctness – in the footnotes, he cites his earlier works, including the *Foreign Affairs* article (2018b) in which he argued that Trump “doesn’t need a grand strategy” (Popescu 2019, footnote 9). However, he does not attempt to explain why, in 2018, he advocated emergent strategy without offensive realism, and now he introduces it. He does not acknowledge that there is a contradiction between his works that advocate a grand strategy

(Johnson and Popescu 2018) and those in which he argued the opposite (Popescu 2018b). He simply ignores the works that do not suit him and selectively cites only those that support his current argumentation.

The significance of this article for Popescu's theoretical trajectory is twofold. First, it shows that already in 2019, he was ready to normatively advocate offensive realism, but he was not yet ready to attribute the possession of a grand strategy to Trump. Second, it represents a bridge between the contradictory positions of 2018 and the complete shift that would follow in 2025.

At first glance, the year 2020 seems to be a continuation of the earlier pattern – Popescu still changes his views without explanation. Nevertheless, it also brings the first, albeit only partial, sign of reflexivity. In February 2020, he published a review of Colin Dueck's book *Age of Iron: On Conservative Nationalism* (*The National Interest*). There, he approvingly presents conservative nationalism as a coherent school of thought and argues for abandoning liberal internationalism in favour of a realist framework. Especially interesting is his observation about the Trump administration, which he says possesses "good grand strategic instincts": "Whether the current administration's good grand strategic instincts will be harmed by tactical errors in implementation remains to be seen" (Popescu 2020a). Thus, he still supports a grand strategy, but expresses reservations about its implementation.

Seven months later, in September 2020, Popescu published an article entitled "It's Too Soon to Kill Grand Strategy" (*The National Interest*) in which he entered a polemic with Drezner, Krebs, and Schweller, who had argued that grand strategy is dead. Here, Popescu defends grand strategy, emphasising that emergent strategy should be its complement, not a substitute. At the same time, he sharply criticises the Trump administration, accusing it of "ad-hocism, self-contradictions, incoherence, and inconsistency" and noting that "not much learning or successful adaptation and improvisation occurred" (Popescu 2020b). Most importantly, for the first time, something resembling reflexivity appears: "At the beginning of the Trump administration, a plausible argument could have been made that emergent strategy is likely to suit the style of this administration better than grand strategy. Three years into this presidency, however, the accumulating evidence makes it very hard to keep holding on to that view" (Popescu 2020b).

This admission that at the beginning of Trump's term, there existed a "plausible argument" in favour of emergent strategy is a

significant step. Popescu shows that he is aware of the change in context and that the earlier view is no longer sustainable. However, he does so in the third person: he does not say “I advocated that argument,” but “a plausible argument could have been made.” Thus, he acknowledges that a change has occurred, but he does not relate it to his own theoretical transformation. His reflexivity remains partial – it is only a hint of what it should be, because it does not meet the requirement of explicitly re-examining his own earlier positions.

A comparison of these two texts from 2020 reveals another contradiction that Popescu does not explain. In February, he praises Trump’s “good grand strategic instincts,” (Popescu 2020a) while in September, he writes about the “ad-hocism and incoherence” (Popescu 2020b) of his administration. He gives no answer to the question of whether Trump’s policy changed fundamentally between those two dates, nor does he link his texts. This represents yet another example of the absence of reflexivity – not only in the sense of failing to acknowledge a change of stance over the years, but also in the sense of failing to re-examine his own contradictory positions within the same year.

The 2019–2020 phase is important for understanding Popescu’s later shift for two reasons. First, it marks the beginning of the introduction of offensive realism as a normative framework. Second, it shows that Popescu is capable of partially re-examining his own views (the admission that a “plausible argument” existed), but that this reflexivity remains limited – he does not admit his own authorship of that argument, nor does he explain why he changed his mind about Trump between February and September 2020. Third, this phase foreshadows the future shift: the criticism of Trump’s incoherence and the advocacy of grand strategy in September 2020 are closer to the position he will adopt in 2025.

Phase 4 (2022–2025): Selective Application of Criteria and Definitive Abandonment of His Own Framework

The final phase marks the definitive separation from the earlier transplanted and adapted theoretical framework. From 2022 onward, Popescu increasingly advocates offensive realism as the only correct grand strategy for the United States, completely ignoring his own 2017 criteria (level of uncertainty, time horizon, domestic polarisation, and management style). Thus, he not only abandons his own theoretical

apparatus, but also demonstrates a selective application of criteria: he criticises other authors for what he himself has done, without linking his own publications to those criticisms.

Taken together, these two frameworks share an important realist concern with power, national interests, and the limits of liberal internationalism, but they differ substantially in their underlying theoretical logic and strategic implications. In Popescu's earlier conceptualisation, conservative internationalism combines an active US international role with national sovereignty, military strength, alliances, and the defence of an international order favourable to American interests and values. Its realism is therefore qualified by a commitment to freedom and by the possibility of using American power in the service of a particular political and normative order. Offensive realism, as Popescu later presents it through Mearsheimer's framework, rests on a more systemic and structurally determined logic: great powers are driven primarily by the distribution of capabilities and the imperative to prevent potential rivals from achieving regional hegemony, irrespective of their domestic political systems, ideological orientations, or declared values. The difference is therefore not simply one of emphasis, but of the theoretical principles used to identify threats, explain state behaviour, and determine appropriate grand strategy. In the former framework, power is a means through which the United States can sustain a favourable order and advance its interests and values; in the latter, preventing rival hegemony becomes the overriding strategic imperative. This distinction is particularly important for assessing Popescu's theoretical trajectory, because his later embrace of offensive realism is not merely a refinement of his earlier position but a shift toward a different explanatory logic and a substantially different basis for evaluating the US grand strategy. Yet Popescu never explicitly identifies, discusses, or justifies this theoretical transition.

The first concrete manifestation of this theoretical shift appears in the article *Only Offensive Realism Can Contain China* (Popescu 2022b). Here, Popescu systematically presents, for the first time, the principles of offensive realism, drawing primarily on the work of John Mearsheimer (whom he calls "the most influential offensive realist scholar"). These principles will later become the basis of his 2025 book. In Popescu's account, drawing primarily on Mearsheimer's offensive realist theory, international politics is characterised by a persistent struggle among great powers for the status of hegemon. The central threat to a great

power's security is therefore the emergence of another state capable of achieving regional hegemony, while rising powers are assumed to possess revisionist ambitions and to alter the balance of power when circumstances permit (Mearsheimer 2001 cited in: Popescu 2022b). From this perspective, the behaviour of great powers is shaped primarily by systemic imperatives and considerations of the balance of power rather than by their domestic political systems, ideological orientation, or declared values. In Popescu's application of this framework to the US foreign policy, this translates into a strategic priority of preventing China from achieving regional hegemony in Asia and becoming a peer rival to the United States, through the prioritisation of geopolitical and geoeconomic competition, military superiority, and pragmatic alliances over democracy promotion, ideological compatibility, or the preservation of a liberal international order (Popescu 2022b). From this point onward, emergent strategy and the contextual criteria that had structured Popescu's earlier theoretical framework disappear entirely from his analysis. Instead, Popescu argues that the United States must "contain China's ambitious rise to regional, and potentially global hegemony"¹ by following six principles: no peer rivals; geopolitics and geoeconomics over ideology; military superiority over China above all else; winning the tech war and economic decoupling; establishing the US energy dominance; and pragmatic alliances and a realist global institutional order. The goal is unambiguous: "The time to fully embrace an offensive realist grand strategy aimed at countering Beijing is past due" (Popescu 2022b).

Somewhat earlier, in May 2022, Popescu published a review of Benjamin Miller and Ziv Rubinovitz's book *Grand Strategy from*

¹ Popescu's claim is particularly interesting in light of Mearsheimer's original formulation of offensive realism. While Popescu refers to the US "US need to contain China's ambitious rise to regional, and potentially global, hegemony" (Popescu 2022b), Mearsheimer explicitly argues that global hegemony is unattainable for any state, primarily because of the geographical and military constraints that prevent the establishment and maintenance of dominance over the entire international system (Mearsheimer 2001, 41; 84; 236–7). In his view, the highest level of hegemony that a great power can realistically achieve is regional hegemony, after which it seeks to prevent the emergence of other regional hegemons. Popescu's claim thus represents an interesting extension of, or shift in emphasis from, the theoretical framework on which he draws. However, he does not elaborate on this assumption or explain how it fits within Mearsheimer's conception of offensive realism, nor does he return to it in his subsequent work.

Truman to Trump (Popescu 2022a). There, he criticises the authors for not distinguishing between grand strategy and small adjustments, and for not considering the possibility that in certain periods there may be no strategy at all, suggesting that they rely on the literature on emergent strategy, “as I have done in my own work, in order to separate planned grand strategy from emergent strategic shifts” (Popescu 2022a). However, he does not mention that he himself argued in 2018 that Trump “doesn’t need a grand strategy,” nor that in January of the same year, in co-authorship with Johnson, he advocated a grand strategy. Thus, he applies stricter criteria to others than to himself, and does not link his own earlier works with the criticisms he levels against others.

In May 2024, in a co-authored text with Dan Negrea entitled *Donald Trump’s First-Term China Strategy Was A Success* (*The National Interest*), Popescu for the first time explicitly claims that Trump initiated a grand strategy toward China: “Donald Trump’s defining foreign policy legacy is his initiation of a grand strategy to counter China’s military and economic expansionism” (Negrea and Popescu 2024). The article contains no mention of emergent strategy, learning, or adaptation – the focus is exclusively on the fact that Trump successfully established a realist strategy. Popescu, following his established manner, does not refer to his earlier works nor explain why he changed his position.

The year 2024 brings an additional shift. Immediately after Trump’s election victory in November, Popescu published a text in *The American Conservative* entitled *The Promise of Trump’s Realist China Grand Strategy*. Here there is no longer any analytical distance, since he openly advocates Trump’s policy: “President-elect Donald Trump’s decisive election victory gives him a once-in-a-generation mandate to finally implement an America First grand strategy and thus replace the outdated globalist post-World War II framework” (Popescu 2024). At the same time, he warns of bureaucratic resistance, which he says will “certainly attempt to frustrate his realist agenda” (Popescu 2024). Popescu no longer acts as a neutral analyst but as a political advocate.

The culmination comes in April 2025, when Popescu, in the article *Is There a Trump Doctrine?* (*The National Interest*), declares that Trump indeed has a coherent grand strategy based on three pillars: great-power competition, realpolitik (“America First”), and geoeconomics. He even predicts that if Trump remains focused, he will be remembered as “one of America’s most geopolitically astute presidents” (Popescu 2025b). Here, he not only asserts that the strategy exists, but also that

it is good – thereby completing the theoretical shift from the normative recommendation of 2018 (“he doesn’t need a grand strategy”) to the normative judgment of 2025 (“he has a grand strategy, and it is good”). In the same year, he also published the book *No Peer Rivals: American Grand Strategy in the Era of Great Power Competition* (University of Michigan Press), in which he systematically develops an offensive-realist framework and criticises those who reject grand strategy, calling their approach “unhelpful” (Popescu 2025a, 4). He does not mention that he himself adopted such a position in 2018.

CRITICAL SYNTHESIS: THREE CRITERIA FOR ASSESSING POPESCU’S SHIFT

After the chronological presentation of the four phases, Popescu’s theoretical shift can be assessed through three criteria: theoretical consistency, empirical grounding, and reflexivity. Each of them reveals that Popescu carried out his change of theoretical framework without re-examining his earlier positions, with a selective application of criteria, and without explaining the abandonment of his own contextual framework from 2017.

Theoretical consistency in Popescu’s work is seriously undermined. His early framework (2017) required that the choice between grand and emergent strategy depend on four factors: the level of uncertainty, the time horizon, domestic political polarisation, and the style of bureaucratic management. By 2024–2025, this framework has been completely abandoned; Popescu advocates offensive realism as a universal solution, without explaining why his earlier criteria no longer apply. The shift is particularly significant because it extends beyond the abandonment of emergent strategy: Popescu moves from a conservative-internationalist framework that combines realism with a commitment to alliances, American values, and a favourable international order toward a more structurally determined offensive-realist framework centred on preventing rival hegemony. Additionally, in the book *No Peer Rivals*, he criticises those who reject grand strategy as “unhelpful,” not noticing that he himself had adopted such a position in 2018. The contradictions within the same year (detailed in Phases 2 and 3) further undermine the image of a consistent author.

Empirical grounding of Popescu’s claims is equally problematic. He selectively chooses examples that support his thesis while omitting

those that contradict it. Thus, in 2025, he cites tariffs and criticism of NATO as evidence of Trump's realist strategy, but he does not mention the Signalgate affair, which occurred one month before the publication of his article, and which revealed serious coordination problems within the administration. Moreover, he provides no proof that Trump deliberately follows an offensive-realist framework, and he merely points out that some moves can be interpreted that way. Even when he admits that direct causality is hard to establish (*while a direct causal relationship is hard to establish*), he nevertheless draws a conclusion about the success of Trump's strategy, without resolving the methodological problem of causation.

Reflexivity – the author's ability to re-examine his own assumptions and to explain changes – is what is most lacking in Popescu's oeuvre. As shown in the previous phases, he does not explain his theoretical shift (2018–2025), does not acknowledge contradictions within the same year, and does not link his own writings to the criticisms he levels against others. In the review of Miller and Rubinovitz's book (Popescu 2022a), he criticises the authors for imprecisely defining grand strategy, suggesting they rely on the literature that he himself used, while failing to mention that he himself argued in 2018 that Trump "doesn't need a grand strategy," thereby blurring that very distinction. In his later works (2024–2025), he assumes the role of a political advocate, predicting that Trump will be remembered as "one of America's most geopolitically astute presidents" – a judgment that has no empirical grounding but is normative in character.

A comparison with Kenneth Waltz, the founder of neorealism (the intellectual foundation of offensive realism), can illustrate what a transparent revision of a position means.² Unlike Waltz, Popescu shows

² Kenneth Waltz publicly responded to criticism throughout his career and argued for the revision of his views. His openness to criticism is most evident in the collection *Neorealism and Its Critics* (1986), which includes all the key criticisms directed at his theoretical framework, as well as his response in the essay *Reflections on Theory of International Politics: A Response to My Critics* (Waltz 1986). Even later, when neorealism faced significantly altered historical circumstances, Waltz continued to reflect and meta-reflect, problematising the applicability of his framework in several works (Waltz 1988; 1993; 1999; 2000; 2008; 2012; Sagan and Waltz 1995). Therefore, Waltz's significance for international relations is not only as the founder of a coherent systemic theory, but also in setting broader standards of academic reflexivity.

no readiness for that kind of (meta)reflexivity. His shift from claiming that Trump “doesn’t need a grand strategy” to claiming that a grand strategy is “necessary” simply takes place in silence, leaving the reader to try to understand the reasons on his own.

In short, Popescu’s oeuvre, although occasionally analytically sophisticated, is ultimately inconsistent and non-reflexive. This represents a serious theoretical-methodological shortcoming, both for his own conclusions and for the discipline of international relations. These findings raise the question of the implications of such a non-reflexive shift, and of how to understand Trump’s foreign policy outside the framework of grand and emergent strategy.

CONCLUSION

Popescu’s theoretical shift from transplanting and advocating emergent strategy (2017) to advocating an offensive-realist conception of grand strategy (2024–2025) is not merely the personal intellectual trajectory of one author. It is an instructive example for the discipline of international relations of how theoretical frameworks shape analysis and how the absence of reflexivity can go unnoticed, even in the work of an author who publishes in top-tier peer-reviewed journals.

The analysis across four chronological phases has shown that Popescu changes his views without explanation – from the claim that Trump “doesn’t need a grand strategy” (2018) to the claim that a grand strategy is “necessary” (2024–2025). At the same time, he advocates both a grand strategy and an emergent strategy in the same year (2018), praises Trump’s instincts and then criticises them (2020), selectively applies criteria to the work of others (2022), and finally abandons his own theoretical framework without any justification (2024–2025). The absence of reflexivity is not an isolated oversight but a general mannerism that runs through his entire opus.

The shift is also more substantial than a simple movement from one preferred strategy to another. As the comparison of conservative internationalism and offensive realism demonstrates, Popescu moves between theoretical frameworks that, although sharing a concern with power, national interests, and the limits of liberal internationalism, rest on substantially different explanatory logics. While his earlier conservative-internationalist framework combines realism with alliances, American values, and the defence of a favourable international order, his later

embrace of offensive realism places the prevention of rival hegemony and the systemic logic of great-power competition at the centre of the US grand strategy. Popescu never explicitly identifies, discusses, or justifies this theoretical transition.

For the discipline of international relations, this case carries several important lessons. First, it warns of the danger that an author may present his own theoretical framework as the only correct view of reality, ignoring that it is only one of several possible perspectives. This is particularly problematic in real-time research, where the phenomenon (Trump's foreign policy) has not yet assumed its final form. Second, unlike Kenneth Waltz, who in his works explicitly explained changes concerning the application of his theory, Popescu offers no comparable reflexive account of his own theoretical evolution, leaving the reader without an explanation for the transition from emergent strategy and conservative internationalism to an offensive-realist conception of grand strategy. Third, the results of the analysis point to the need for greater theoretical-methodological self-awareness among foreign policy researchers.

However, one open question remains, which Popescu does not consider. It is possible that Trump's foreign policy is not a strategy in either of the two senses (grand or emergent), but rather represents the transfer of an individual business logic into the arena of international relations. The minerals agreement with Ukraine, the "Board of Peace" with a billion-dollar membership fee, business arrangements in Gaza and around the world in which members of Trump's family participate – these moves fit neither the realist nor the emergent framework. They open the door to different interpretations, for example, the possibility that Trump's policy can be understood as a transfer of business logic in which personal (and family) interests come to the fore, rather than the conduct of a coherent strategy. This possibility does not refute the critique of Popescu's absence of reflexivity; on the contrary, it extends it: Popescu is non-reflexive not only about his own theoretical evolution, but also about alternative explanations that do not fall within his realist framework.

Finally, Popescu's case is instructive because it reminds us that the theoretical frameworks used in the study of international relations are not completely neutral, as they partly determine what the researcher "sees." Therefore, the next time we read in a paper that President Trump (or any other leader of a great power) "has," "does not have," or "does

not need” a strategy, we should ask: What theoretical framework is the author using? What does it allow the researcher to see, and what might it obscure? And is the author reflexively aware of his or her own theoretical position and of changes to it over time? The answers to these questions are not merely a matter of reflexivity, but the necessary precondition for a serious and systematic study of international relations.

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ОД ЕМЕРГЕНТНЕ ДО ВЕЛИКЕ СТРАТЕГИЈЕ: ОДСУСТВО РЕФЛЕКСИВНОСТИ У ТЕОРИЈСКОМ ЗАОКРЕТУ ИОНУТА ПОПЕСКУА У АНАЛИЗИ ТРАМПОВЕ СПОЉНЕ ПОЛИТИКЕ

Резиме

У овом раду детаљно се разматра теоријски заокрет Ионута Попескуа у тумачењу спољне политике Доналда Трампа током осам година (2017–2025). Полазећи од увида да аутори мењају своје ставове под утицајем сопствених теоријских оквира, рад се фокусира на питање рефлексивности, односно способности аутора да преиспита сопствене претпоставке и експлицитно образложи промене у свом становишту. Систематским прегледом Попескуових радова (књига, академских чланака и текстова у утицајној периодици) издвајају се четири хронолошке фазе. Прва фаза (2010–2017) обухвата увођење и операционализацију концепта емергентне стратегије уз доследну примену контекстуалног оквира. Друга фаза (2018) доноси оштре контрадикције – истовремено заступање велике стратегије (у два рада) и порицање њене потребе (у чланку за *Foreign Affairs*), без икаквог објашњења. Трећа фаза (2019–2020) карактерише се увођењем офанзивног реализма уз задржавање емергентне стратегије, уз делимичну, али недовољну рефлексивност. Четврта фаза (2022–2025) кулминира напуштањем сопственог контекстуалног оквира и преласком на универзално заговарање офанзивног реализма, без икаквог образложења. Рад показује да Попеску не објашњава свој теоријски заокрет, не признаје контрадикције унутар исте године и селективно примењује критеријуме, а што указује на вишеструко одсуство рефлексивности. Читалац, стога, остаје трајно ускраћен за разлоге који су Попескуа определили да направи заокрет од заговарања

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емергентне стратегије до универзалне афирмације офанзивног реализма у оквиру велике стратегије. Управо та необјашњеност заокрета чини овај случај посебно поучним за дисциплину међународних односа и упозорава на то да се сопствени теоријски оквир може приказивати као једино исправно виђење стварности, али и да се кључне теоријске промене могу одвијати у потпуној тишини. Тиме се наглашава потреба за већом методолошком самосвешћу у истраживањима спољне политике.

Кључне речи: велика стратегија, емергентна стратегија, рефлексивност, Ионут Попеску, Трамп, спољна политика

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SERBIA'S SOCIAL POLICY THROUGH THE EPOCHS: INSTITUTIONAL DEVELOPMENT AND IDENTITY PATTERNS***

Abstract

The paper analyzes the historical development of Serbia's social policy through the institutional phases and identity dimensions of its formation. Starting from the assumption that social policy reflects broader social, political, and value-based transformations, the paper identifies the key epochs of its development: the premodern period, the charitable-humanitarian epoch, the state-institutional phase, the socialist-universalist model, the crisis-transition epoch, and the reform-European period. Special attention is devoted to the institutional development of

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social policy, as well as to the changes in the value-based and identity patterns that shaped the relationship between society and the state toward social risks, poverty, and vulnerable social groups. The paper proceeds from the thesis that Serbia's social policy developed through a dynamic relationship between continuity and discontinuity, whereby traditional values of solidarity, charity, and family responsibility were gradually transformed into contemporary principles of social justice, human rights, and social inclusion. The methodological approach is based on historical and comparative analysis. The results of the analysis indicate that the contemporary model of Serbia's social policy represents a mixed system in which the state, local communities, and civil society have complementary roles. The paper concludes that the further development of Serbia's social policy implies linking identity-based traditions of solidarity with institutionally sustainable responses to contemporary social challenges.

Keywords: social policy, Serbia, historical development, institutional phases, identity patterns, solidarity, social inclusion

INTRODUCTION

Social policy is an applied social and academic scholarly discipline, as well as a field of political science and practical policy, concerned with the ways in which society recognizes, conceptualizes, and responds to social needs, while improving care and support for members of the community. It includes a set of activities carried out with the aim of improving people's standard of living, especially for those who are in a less favorable social position. The universal goals of social policy are the reduction of poverty and social inequalities, the satisfaction of human needs, the improvement of the quality of life, and the promotion of social justice. In its historical continuity, social policy has relied on four groups of instruments: laws and regulations, for example, those concerning social protection and the family; public programs, such as social assistance and pensions; public services, such as homes for the elderly and centers for social work; and the activities of charitable, humanitarian, and non-governmental organizations in providing social services to vulnerable groups.

This field of policy has always been influenced by value-based and institutional factors. Viewed from a historical perspective, the factors of its development include the development of the state and social rights, the modernization of society, industrialization and urbanization, the struggle of vulnerable populations, especially the poor and the unemployed, for their social position, as well as the influence of the church and religious values (Jugović i Gavrilović 2020). Historically, social policy was more a reactive activity of society and the state, aimed at preserving social peace, than a systematically organized one. More significant institutional development began only in the first half of the twentieth century. Since then, social policy has developed as part of the conceptions of the so-called social state and public policies, through the expansion of social programs and reforms.

Naturally, every society has had its own specific features in the development of social policy, which must be observed through historical, ideological, value-based, political, cultural, social, and legal factors of influence. In the theoretical understanding of the development of social policy, an important contribution is made by approaches that link social rights with the development of citizenship and contemporary social transformations. Marshall indicates that the development of civil, political, and social rights represents a key process in the modernization of society and the formation of the social state (Marshall [1950] 1992). Building on this perspective, Titmuss emphasizes that social policy is not merely a set of institutional measures, but also an expression of social solidarity and collective responsibility (Titmuss 1974). In the contemporary context of the transformation of the social state, Giddens points to the need to redefine social policy through the concept of the "Third Way," which connects traditional values with new social risks and responsibilities (Giddens 1998).

These approaches provide an important framework for understanding the historical development of Serbia's social policy, especially in the context of the relationship between identity-based values, institutional changes, and contemporary social challenges. Social policy reflects the social values, political ideologies, and institutional capacities of the state. Its development in Serbia was not linear, but marked by discontinuities and transformations conditioned by historical circumstances. At the same time, despite various political and social changes, certain continuities of values can be observed in the

development of Serbia's social policy, particularly in terms of solidarity, care for vulnerable social groups, and collective responsibility for social security.

Serbia's social policy can be viewed not only as a set of institutional arrangements, but also as an expression of specific identity patterns formed through the historical development of the state and society. In this paper, identity patterns are understood as relatively stable value-based and cultural ways of understanding solidarity, charity, family responsibility, state care, and social justice.

The subject of this paper is an analysis of the historical development of Serbia's social policy through two mutually connected dimensions – the institutional phases and the identity dimensions of its formation. The aim of the paper is to identify the key epochs in the development of Serbia's social policy, as well as to point out the continuities and discontinuities in its value foundations. The paper applies the historical and comparative methods.

INSTITUTIONAL DEVELOPMENT OF SERBIA'S SOCIAL POLICY

In contemporary literature, the development of social policy is most often analyzed through different models of the welfare state, such as the liberal, conservative-corporatist, and social-democratic models (Esping-Andersen 1990). In addition, transitional societies have also developed hybrid models of social policy, which combine elements of different systems in accordance with historical, political, and social specificities.

Serbia's social policy passed through different epochs. In each of them, there was a specific understanding of the content and scope of social policy, dependent on social conditions in the state, the value system, the dominant ideology, the political order, and the economic capacities of society. The development of social policy in Serbia moved from a humanitarian model, through socialist universalism, toward a contemporary mixed model in which the state, local self-governments, civil society, and international organizations play significant roles. If observed from the Middle Ages to the present, the following key epochs in the development of Serbia's social policy can be distinguished:

1. The premodern period, from the Middle Ages to the nineteenth century;
2. The charitable-humanitarian epoch, from the nineteenth century to 1918;
3. The state-institutional epoch, from 1918 to 1941;
4. The socialist-universalist epoch, from 1945 to 1990;
5. The crisis-transition epoch, from 1990 to 2000;
6. The reform-European epoch and contemporary trends, from 2000 to the present.

The Premodern Period (the Middle Ages – the Nineteenth Century)

During the Middle Ages, and especially up to the fifteenth century, care for people who were poor, ill, or elderly was carried out primarily through the activities of churches and monasteries. In this sense, the clergy and monastic communities represented important precursors of organized forms of social care. In the Ottoman period, from the fifteenth to the nineteenth centuries, social assistance developed through waqfs, that is, endowments, charitable funds, and religious institutions (Lakićević 1991). In the Middle Ages, Serbian rulers, noblemen, and religious dignitaries, drawing on Christian ideals and Byzantine customs, built and restored churches, monasteries, and hospitals, while also providing assistance to people living in poverty.

The Hilandar and Studenica Typika of 1199 contain provisions concerning the protection of those who were regarded as helpless, poor, and ill (Anđelković 2024, 108). The Zakonopravilo of Saint Sava, or the Nomocanon, which was compiled in the early thirteenth century as a collection of ecclesiastical and civil rules, is of particular importance for understanding the premodern foundations of social care (Zakonopravilo Svetog Save 2019, V). In addition to norms regulating church and legal life, it also contains rules concerning the protection of the poor, the disenfranchised, widows, vulnerable children, and other socially vulnerable groups. In this respect, the Zakonopravilo can be regarded as one of the important normative sources of premodern forms of social care in Serbian medieval society (Petrović 1983).

In 1348, Emperor Dušan founded a hospital at Hilandar and in the Monastery of the Holy Archangels near Prizren, where various

protective activities were carried out, including a public kitchen for the poor (Katić 1990, 96). Helen of Anjou, the wife of King Uroš I, founded the first women's school, which had a social, educational, and pedagogical character (Jugović 2010, 55). With the restoration of the Serbian state in the nineteenth century, during the uprisings and through the process of expanding and gaining Serbian statehood, social policy was reflected in the adoption of the first regulations concerning care for children without parental care, persons with disabilities, and the poor. An example of such institutional development was the Law on Municipalities of 1839 (Ljuboja 2013, 13). During this period, the first hospitals, homes, and institutions for children and adults living in social hardship were established. Humanitarian societies also began to operate, among which the Serbian Red Cross, founded in 1876, held a particularly important place (Crveni krst Srbije [CKS], n.d.). The focus of this epoch was on charity and philanthropy, while the state was only beginning to develop its social roles and institutions.

The Charitable-Humanitarian Epoch (the Nineteenth Century – 1918)

The context of the development of social policy in this period was linked to the social, economic, and political circumstances of Serbia at the time. The nineteenth century was an era of struggle for freedom and the acquisition of the political independence of the Serbian state. As Antić points out, in the nineteenth century, Serbia was one of the poorest and least educated European states, with the constant political hostility of the Great Powers and neighboring Balkan states (Antić 2013). The population lived in very poor hygienic, sanitary, and health conditions, with a small number of physicians. The Faculty of Medicine was established only in 1920. Nevertheless, with the exception of large and significantly wealthier states, such as Germany, the population of Serbia during the nineteenth century did not live substantially differently from most of the population of other European states at that time. Moreover, Serbia of that period did not experience a mass famine of the kind that was occasionally present in Russia or Great Britain (Antić 2013).

In this period, social care was not a universal right, but an act of solidarity, mercy, and charity. It was based on charitable, ecclesiastical, and humanitarian forms of assistance. At the end of the nineteenth century, the patriarchal family played a particularly important role

in ensuring social security in Serbia, serving as the primary source of support, understanding, and solidarity (Marjanović 2023a). In the late nineteenth and early twentieth centuries, the activities of church and humanitarian organizations, associations, and foundations were dominant, among which the Circle of Serbian Sisters stood out. The state did not yet have universal systems of social security, but it was beginning to develop the legal foundations of social policy. Its role was limited and was mainly reflected in various regulations and measures directed toward the poor, war invalids, and other particularly vulnerable groups. The Balkan Wars and the First World War created a great need for care for the wounded, children without parental care, widows, military and civilian invalids, and displaced persons. In this way, the first stronger incentives for a more organized social policy emerged.

The State-Institutional Epoch – the Period of the Kingdom of Serbs, Croats and Slovenes / Yugoslavia (1918–1941)

This epoch began after the end of the First World War. According to official statistics, Serbia lost between 1,100,000 and 1,300,000 inhabitants in this war as a result of combat, hunger, or disease (Antić 2013, 251). This represented approximately 28% of the total population. It was the greatest demographic catastrophe in the country's history, in which around 275,000 soldiers and 150,000 civilians died in military operations, while around 300,000 people died from disease and epidemics (Antić 2013, 251). In addition, nearly 287,000 members of the Serbian people in Austria-Hungary and around 50,000 inhabitants of Montenegro, or approximately 19% of its population, were killed or died during the war (Antić 2013, 251).

The socio-political context of this epoch was linked to the economic and demographic characteristics of the population. For example, during this period, between 75% and 80% of the population was engaged in agriculture, while only about 10% worked in industry (Lakićević 1991, 284). Such an economic structure influenced social policy to a great extent, making it reliant on the solidarity of rural households and the patriarchal family, while the role of the state was directed toward the extremely poor and toward the initial development of concern for the position of workers. The poverty of the rural population, workers, and the urban population was the key social problem of this period (Lakićević 1991).

During this period, the first state institutions of social protection were established, along with the Ministry of Social Policy of the Kingdom of Serbs, Croats and Slovenes. Homes for children, associations of disabled persons, and workers' funds were established. Laws in the field of social policy were also adopted, such as the Law on the Protection of the Poor, the Elderly, and the Helpless of 1922, the Law on Workers' Insurance of 1922, and the Law on the Protection of Children and Youth of 1922 (Lakićević 1991, 301, 308, 310). Nevertheless, protection remained limited and selective, mainly directed toward industrial workers, while the majority of the population, especially the peasantry, remained outside the system of social assistance and support. This was a consequence of the prevailing doctrine of that time in Serbia, that is, in the then Yugoslavia, concerning the mismatch between economic and social development. Social policy was understood as a counterbalance to economic policy (Lakićević 1991).

The rare scholarly and professional works in the field of social policy during this period dealt with issues of labor legislation (Adžija 1961), social diseases and the protection of public health (Štampar 1925), the motives of social policy under capitalism (Jovanović 1931), social rights (Perić 1931), and the position of workers' and poor children (Vidaković 1932; 1937). The value of these authors' works lies in their attempts to explain the importance and role of social policy in the humanization of society.

The Socialist-Universalist Epoch (1945–1990)

After the Second World War, Serbia, in political terms, assumed the constitutional position of one of the six republics of the Socialist Federal Republic of Yugoslavia. This state emerged from the Second World War with devastating demographic and economic consequences. Above all, it lost around 1,700,000 inhabitants; one fifth of all houses were destroyed, along with more than one third of its industrial potential, more than half of its schools, and around 40% of its livestock (Lakićević 1991, 341). The social development of the SFRY was characterized by population growth resulting from positive natural increase, longer life expectancy, a mass transfer of the population from rural to urban areas, the reduction of illiteracy, and the transformation of the family model (Lakićević 1991).

In the newly established Federal People's Republic of Yugoslavia (1945–1963), preserving the revolutionary tradition and the achievements of the National Liberation War constituted key ideological and value priorities. Accordingly, the social protection of war veterans, disabled war veterans, and the families of fallen fighters occupied a prominent place in the social policy of this period (Marković Savić i Vukotić Lazar 2021, 329).

After the Second World War, a socialist model of social policy was introduced through the one-party system. According to Lakićević, the basic goal of social policy in this epoch was the satisfaction of human needs within the system of socialist self-management (Lakićević 1991). The state became the main bearer of social policy, that is, the ruling party, the League of Communists of Yugoslavia. The principles of universality and social rights for all citizens were introduced. The emphasis was placed on citizens' right to social security, rather than on voluntary and humanitarian foundations of social care.

During this period, a broad network of health and social protection developed, encompassing general health protection and universal health insurance, mandatory pension and disability insurance for workers, the development of a network of centers for social work from the 1960s onward, as well as the development of social institutions such as homes for children, the elderly, and persons with disabilities (Lakićević 1991, 357). This epoch was marked by strong etatization and state centralization, with a significantly smaller role for civil society in social policy. Numerous economic, political, and ethnic contradictions led to the collapse of socialist Yugoslavia and of the model of society that had been in place since the end of the Second World War.

The Crisis-Transition Epoch and the Dissolution of the SFRY (1990–2000)

This epoch began with the crisis and dissolution of socialist Yugoslavia, wars, sanctions imposed by the international community on Serbia, and a severe economic crisis, including hyperinflation, all of which led to a serious deterioration of the population's social security. During this period, Serbia received more than 550,000 refugees from the former Yugoslav republics (Marjanović 2023b, 122). During this period, poverty and unemployment increased sharply. Social policy increasingly relied on minimal cash benefits and on enabling broad

segments of the population to survive through the informal economy. Social services came under great pressure as a result of the refugee and internally displaced persons crisis. There were also major delays in the payment of child allowances and other social benefits.

The end of this epoch was marked by the aggression of the NATO pact against Serbia, the placing of the Autonomous Province of Kosovo and Metohija under the jurisdiction of the United Nations, and numerous negative social, economic, and psychological consequences that arose after the end of the bombing. From the perspective of social policy, the consequences of this epoch were reflected primarily in the displacement of part of the Serbian and other non-Albanian population from Kosovo and Metohija, human casualties, additional pressure on social protection systems, the deepening of poverty, and the weakening of the state's economic capacities. Numerous difficulties also emerged in the implementation of support measures for disabled war veterans concerning the protection of their rights and the social status of this social group (Marković Savić 2023).

According to UNHCR data, after 1999, around 200,000 persons were internally displaced from Kosovo and Metohija to central Serbia (United Nations High Commissioner for Refugees [UNHCR] n.d.). The Office for Kosovo and Metohija of the Government of the Republic of Serbia states that the consequences of the NATO aggression are also associated with more than 2,500 civilian deaths, including 89 children, as well as with more than 1,000 killed members of the army and police (Kancelarija za Kosovo i Metohiju 2025). The economic consequences were pronounced, since, according to a report of the International Monetary Fund, the bombing led to a sharp decline in production and a reduction of real GDP in 1999 by approximately 20% (International Monetary Fund [IMF] 2001).

The Reform-European Epoch and Contemporary Trends (2000–Present)

After the political changes of 2000, a process of social policy reform and alignment with European Union standards began (Vuković i Čekerevac 2006). Since the beginning of the twenty-first century, policies in the fields of employment, social protection, and education in Serbia have developed on a number of assumptions of global neoliberal

ideology, such as the ideas of individualization, privatization, and marketization (Vuković i Babović 2022).

The process of social policy reform in the field of the social protection system was directed toward the regular payment of social benefits, such as financial social assistance and child allowance, the strengthening of the civil sector and non-governmental organizations in the provision of social services, the introduction of local social protection services, such as day care centers and personal assistance, the deinstitutionalization of residential care, and the promotion of foster care for children without parental care. Emphasis was also placed on partnership between the state and civil society, empowering beneficiaries for independent and productive life in the community, decentralizing the financing of rights and services, and introducing the case management model into centers for social work (Jugović, Žunić-Pavlović i Brkić 2009; Jugović i Brkić 2013; Gavrilović and Jugović 2012; Perišić 2016).

During this period, the new and currently applicable Law on Social Protection was adopted in 2011 (ZSZ 2011). The concept of active inclusion was developed through a focus on empowering users of social support services. Social innovations were encouraged through the development of social enterprises and digital platforms for certain social services. The focus was placed on the protection of vulnerable groups, such as children, persons with disabilities, Roma, elderly persons, victims of domestic violence, and other socially vulnerable groups. According to Vuković and Babović, Serbia has a hybrid model of social development based on exogenous investment capitalism and reactive social protection through ad hoc measures intended to quickly correct emerging problems (Vuković i Babović 2022). Recent research on the post-Yugoslav transformations of social policy and social work in Serbia further indicate that the past three decades have been marked by unfinished reforms, institutional limitations, and continuous efforts to adapt the social protection system to new social risks, market pressures, and European reform requirements (Perišić and Pavlović 2024).

Contemporary challenges for Serbia's social policy include risks of poverty, population aging, the emigration of parts of the working-age population, regional socio-economic inequalities, the improvement of public health, the digitalization of social services, the financial sustainability of the social security system, and the fairness of various areas of social policy. Perišić identifies as one of the key

reform challenges the orientation of the social protection system more toward benefits than toward services, while the benefits themselves are often inadequate for overcoming poverty (Perišić 2016). The COVID-19 pandemic revealed the vulnerability of the system and the need for faster digital and organizational changes. The key problems that emerged during this period were insufficient financial resources for social protection services, as well as regional and social differences in the quality and availability of health and social services (Matković and Stubbs 2020).

Pierson argues that the development of the welfare state in the contemporary period is characterized by the “new politics of the welfare state,” marked by the constraints of fiscal sustainability, demographic changes, and the restructuring of social rights (Pierson 2001). Within the European context, Ferrera identifies a specific “Southern European model” of the welfare state, characterized by the strong role of the family, fragmented protection systems, and the significant influence of historical institutional patterns (Ferrera 1996). At the same time, Deacon emphasizes the growing influence of global processes and international institutions on the shaping of national social policies (Deacon 2007), while Cerami and Vanhuyse point to the specific developmental paths of social policy in post-socialist societies, marked by hybrid institutional arrangements and the combination of traditional and contemporary models of social protection (Cerami and Vanhuyse 2009).

These approaches provide an important analytical framework for understanding the transformations of Serbia’s social policy in the context of transition, European integration, and identity specificities. The analysis of contemporary social policies in Southeast Europe indicates the significant influence of international actors, institutional reforms, and the specific historical circumstances of the region. Stubbs and Zrinščak emphasize that social policies in the countries of Southeast Europe have been shaped through a complex relationship between domestic institutional traditions and international interventions, especially during the period of transition and European integration (Stubbs and Zrinščak 2015). More broadly, comparative analyses of welfare states point to different developmental paths of social policies, emphasizing the importance of historical, political, and cultural factors in shaping national models of social protection (Castles *et al.* 2010).

The broader regional framework shows that post-Yugoslav transformations of social policy were not marked only by changes in

normative models, but also by the legacy of wars, economic transition, institutional fragmentation, and external reform influences. An analysis of the social protection system in the Republic of Srpska indicates a slow and rudimentary course of reforms, as well as the importance of intervention-based and fragmentary measures conditioned by practical needs, limited resources, and the influence of international organizations (Gajić, Rakanović Radonjić and Šućur-Janjetović 2024). This regional parallel is significant for understanding the broader post-socialist and post-Yugoslav environment in which contemporary models of social policy in the Serbian national and institutional space were shaped.

DEVELOPMENT OF VALUES AND IDENTITY PATTERNS IN SERBIA'S SOCIAL POLICY

Social policy reflects the value system of a society and the way in which that society relates to social risks, poverty, and inequalities. In Serbia, as in other European societies, the development of social policy has passed through several epochs, from the premodern period, in which religious and humanitarian values predominated, to the contemporary period, in which social protection forms part of human rights and the system of social justice (Table 1).

In the premodern period, from the Middle Ages to the nineteenth century, social policy did not exist as an institutionalized system, but was based on the moral-religious norms and customs of the community. According to Lakićević, the Orthodox Church remained faithful to the early Christian teaching that it was the duty of believers to perform acts of mercy, while the role of the Church was to initiate social actions (Lakićević 1991). At the same time, in this period, the Church advocated the view that the social-protective function was primarily the obligation of the state, in accordance with the principle “render unto Caesar the things that are Caesar’s, and unto God the things that are God’s.” Social care in Serbia was organized through religious, patriarchal, and humanitarian values, rather than through a developed state system. Christian ethics of mercy implied that care for the poor and the sick was a moral and religious duty. Monasteries represented the first forms of social institutions, providing shelter, food, and medical care. Almsgiving was understood as an act of salvation for the soul of the giver, rather than as a right of the recipient.

Charity and endowment also played an important role, as rulers and wealthy individuals founded endowments, monasteries, hospitals, and schools, thereby emphasizing personal honor and contribution to the community. In this sense, philanthropy had both a religious and a socio-political dimension. An important part of the premodern identity pattern was also patriarchal family care. The family was the primary bearer of social security, and care for the elderly, the sick, and the helpless was considered a duty of relatives. Neglecting family members had the character of a moral transgression. In addition, in rural communities, there were customs of mutual assistance and collective responsibility, which mitigated social risks.

In the Ottoman period, waqfs and religious endowments also contributed to social security by offering assistance to the poor, widows, travelers, and the sick. These values had a pronounced moral-religious foundation. Their common feature was that social assistance did not represent a universal right of citizens, but rather a form of mercy, privilege, or support dependent on the goodwill of the community, authorities, or wealthy individuals.

In the twentieth and twenty-first centuries, Serbia's social policy developed in accordance with European and socialist ideas of the welfare state, and after 2000 also in the direction of European integration. As Vuković and Babović point out, contemporary welfare-state social policies are social investment policies, particularly in the fields of education, health, employment, migrant integration programs, and human resource development, and not only policies of insurance and protection against social risks (Vuković i Babović 2022). The contemporary values of Serbia's social policy are grounded in human rights, social justice, institutional solidarity, social inclusion, and the legal foundation of the system. Social rights are understood as part of internationally recognized human rights, with every citizen regarded as a bearer of the right to social security and a dignified life. Material benefits and social protection services are based on the principles of fairness and redistribution, with the aim of reducing social differences. Responsibility for caring for vulnerable groups is no longer only familial or religious, but predominantly institutional, involving the state, local self-governments, and the civil sector. Policies are directed toward vulnerable groups, such as children at risk, Roma, persons with disabilities, elderly persons, and victims of violence, in order to enable their full participation in society. The contemporary system is legally

grounded, secular, and based on legal guarantees, although there remains space for philanthropy and the activities of religious and humanitarian organizations.

Table 1. Comparative Analysis of Premodern and Contemporary Values of Serbia's Social Policy

Premodern period, Middle Ages – nineteenth century	Contemporary period, twentieth–twenty-first century
Mercy and Christian ethics – helping the poor as a moral and religious duty.	Human rights – social protection as a universal right of every citizen.
Charity and endowment – wealthy individuals support the community for the sake of salvation, honor, and social responsibility.	Social justice and equality – the state ensures redistribution and equal opportunities.
Family care and patriarchal morality – the family is the basic unit of social security.	Solidarity of society and the state – responsibility shifts to institutions and the community as a whole.
Community solidarity in rural communities – collective responsibility and assistance at the local level.	Social cohesion – modern society strengthens the integration and inclusion of vulnerable groups.
Waqfs and religious endowments – religious institutions are important bearers of social assistance.	Secular system of social policy – the state, local self-governments, the civil sector, and international funds play significant roles.
Assistance as a privilege – it is received by those who are extremely vulnerable and depends on the goodwill of others.	Assistance as a right – legally guaranteed social benefits and services for vulnerable citizens.

Source: Authors.

Although the value foundations of the premodern and contemporary periods differ significantly, certain continuities nevertheless exist. Solidarity has remained a central value: in the past, it was expressed through family and village-based assistance, whereas today it is expressed through taxes, public funds, and institutional programs. Charity is still present, but it now has a supplementary role in relation to the state system. Care for the helpless remains a constant, although its understanding has changed – from a moral obligation to a

legal right. The greatest discontinuity is reflected in the shift from the concept of social assistance as almsgiving and privilege to the concept of social protection as a universal right and an obligation of the state. In the premodern period, social policy was based on moral and religious values. In the contemporary period, it is based on citizens' rights, social justice, and institutional solidarity.

The preceding comparative analysis clearly shows that the historical development of Serbia's social policy reflects a broader transformation of social values. In the premodern period, it was based on religion, tradition, and moral norms, while in the contemporary period, it is based on human rights, social justice, and inclusion. Despite these differences, continuities in the values of solidarity and care for persons facing social hardship testify to a deeply rooted tradition of community.

The contemporary challenge for Serbia is to connect traditional elements with modern European standards and to ensure a sustainable, just, and inclusive system of social policy. The development of Serbia's social policy also shows certain similarities with other countries of Central and Eastern Europe, which went through the socialist model and transitional reforms. However, Serbia's specificity lies in the stronger influence of historical discontinuities, wars, and prolonged economic crisis, which additionally shaped the identity dimensions of social policy.

CONCLUSION

The development of Serbia's social policy shows that this field of public policy emerged in close connection with broader social, political, and value-based changes. Viewed through historical epochs, Serbia's social policy passed from religiously and morally based care for vulnerable members of the community, through charitable-humanitarian and selective forms of assistance, and through the universalist socialist model, to the contemporary mixed system that combines state responsibility, local initiatives, the activities of civil society, and the influence of international actors. This development points to the gradual institutionalization of social policy, but also to changes in its value foundations.

The analysis of institutional development shows that Serbia's social policy was conditioned by historical circumstances, particularly wars, economic crises, political transformations, and processes of modernization. In the premodern period, religious and patriarchal

forms of social care predominated, while in the nineteenth and early twentieth centuries, the first forms of state regulation and institutional protection appeared. The period of socialist development was marked by the expansion of universal social rights and the strong role of the state, while the transition period of the 1990s brought a crisis of social security and a reduction of the state's social functions. After 2000, reforms were introduced that were directed toward European standards, the development of local services, deinstitutionalization, active inclusion, and the strengthening of partnerships between the state, local communities, and civil society.

The comparative methodological approach made it possible to systematically examine continuities and discontinuities in the values of Serbia's social policy across different historical epochs. The transformation of traditional norms of solidarity, charity, and family responsibility into contemporary principles of social justice, human rights, and institutional solidarity is particularly evident. Nevertheless, despite these transformations, certain value continuities have remained present, especially in the emphasis on solidarity and care for vulnerable social groups. These continuities indicate the existence of a specific identity pattern of Serbia's social policy, one that connects traditional and contemporary approaches.

The contribution of this paper lies in the fact that it does not view the development of Serbia's social policy only as a sequence of institutional changes, but also as a process of shaping value-based and identity patterns. In this way, the paper shows that social policy is not merely a technical-administrative field of public policy, but also an expression of the way in which society understands solidarity, responsibility, justice, and its relationship toward vulnerable groups.

The results of the analysis indicate that the contemporary model of Serbia's social policy is developing as a mixed system. At the same time, this model faces numerous challenges, including demographic aging, poverty, regional inequalities, migration, increased risks of social exclusion among certain social groups, the financial sustainability of the system, and the need for the digital transformation of social services. These challenges require further improvement of institutional capacities and the development of sustainable, just, and accessible models of social policy.

The contemporary development of Serbia's social policy implies connecting traditional values of solidarity, community, family

responsibility, and humanitarianism with modern principles of social justice, human rights, and social inclusion. The historical development of Serbia's social policy shows that tradition and modern European standards do not have to be opposed, but can coexist in the shaping of a sustainable and inclusive system of social policy.

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СОЦИЈАЛНА ПОЛИТИКА СРБИЈЕ КРОЗ ЕПОХЕ: ИНСТИТУЦИОНАЛНИ РАЗВОЈ И ИДЕНТИТЕТСКИ ОБРАСЦИ***

Резиме

У раду се анализира историјски развој социјалне политике Србије кроз институционалне фазе и идентитетске димензије њеног обликовања. Полазећи од претпоставке да социјална политика одражава шире друштвене, политичке и вредносне трансформације, у раду се идентификују кључне епохе њеног развоја: предмодерни период, добротворно-хуманитарна епоха, државно-институционална фаза, социјалистичко-универзалистички модел, кризно-транзициона епоха и реформско-европски период. Посебна пажња посвећена је институционалном развоју социјалне политике, као и променама у вредносним и идентитетским обрасцима који су обликовали однос друштва и државе према социјалним ризицима, сиромаштву и рањивим друштвеним групама. Рад полази од тезе да се социјална политика Србије развијала кроз динамичан однос континуитета и дисконтинуитета, при чему су традиционалне вредности солидарности, доброчинства и породичне одговорности постепено трансформисане у савремене принципе социјалне правде, људских права и социјалне инклузије. Методолошки приступ заснива се на историјској и компаративној анализи. Резултати анализе указују да савремени модел социјалне политике Србије представља мешовити систем, у коме држава, локалне заједнице и цивилно друштво имају комплементарне

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улоге. Закључује се да даљи развој социјалне политике Србије подразумева повезивање идентитетских традиција солидарности са институционално одрживим одговорима на савремене социјалне изазове.

Кључне речи: социјална политика, Србија, историјски развој, институционалне фазе, идентитетски обрасци, солидарност, социјална инклузија

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ARE THERE INTERNAL LIMITATIONS ON LIBERTY? BERLIN'S VS. GREEN'S AND TAYLOR'S UNDERSTANDING**

Abstract

The subject of this paper is the question of liberty, which occupies a central place within philosophical and socio-political debates. The problem of liberty has been a subject of consideration since ancient times; however, we still cannot speak of the existence of a single definition of liberty that everyone would agree upon. Different definitions of liberty are the result of different understandings of what can be considered the subject of liberty, as well as what can constitute a limitation of liberty. This paper deals with the definition of liberty in relation to how we define its limitation. The starting premise of this paper is Isaiah Berlin's definition of negative liberty as the absence of external obstacles, or coercion. We will then analyse the critiques of this conception of liberty, which amount to the claim that, in addition to external, we can also speak of internal obstacles to liberty. These include Thomas Hill Green's normative theory of liberty, as well as Charles Taylor's conception of liberty as autonomy. What these critiques have in common is their abandonment of the idea that liberty consists in the right to do as we please, or the view that there is a necessary connection between an individual's liberty and their motives and ends. The aim of

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the paper is to show the advantage of the negative conception of liberty over the positive one, namely the definition of liberty as the absence of external, and not internal, obstacles to liberty.

Keywords: Isaiah Berlin, Charles Taylor, Thomas Hill Green, autonomy, positive liberty, negative liberty

INTRODUCTION

This paper addresses the question of what can constitute a limitation on liberty. Accordingly, it is of crucial importance to address the following problems: Does liberty relate only to the relationship between the individual and the state, as well as to interpersonal relations, or does it also presuppose certain internal conditions? Does liberty consist in the right to do what we want? Is there a connection between an individual's liberty and their ends, motives, and preferences? The answers to these questions depend on the starting assumption of whether, in addition to external, there are also internal obstacles to liberty.

BERLIN'S DEFINITION OF NEGATIVE LIBERTY

The starting point of this paper is Berlin's definition of negative liberty as the absence of coercion, or external obstacles to liberty.¹ Negative liberty, according to Berlin's conception, represents the absence of interference, that is, the interference of other people within the sphere in which an individual could act differently. It is important to emphasise here that only people can limit our liberty, and not other factors. If, for example, bad weather has prevented us from leaving the house, we cannot call that a lack of liberty. Whereas the meaning of positive liberty consists in the answer to the question: 'Who rules over me?', the meaning of negative liberty is contained in the answer to the question: 'How much does the government interfere in my life?' (Berlin 1992, 215). From this, it follows that positive liberty relates to the source of control, while negative liberty relates to the sphere of control. Negative liberty, therefore, represents the sphere of individual liberty that lies

¹ For further insights into Berlin's definition of positive and negative liberty (see Stančić 2020, 21–36).

outside state interference, within which individuals freely choose their own goals and do what they want, or what they are capable of.

Berlin favours negative liberty, as opposed to positive, as the basic meaning of liberty, on the grounds that the meaning of positive liberty can be distorted, i.e., it can be turned into its opposite – the defence of power (Berlin 1992, 51). If we define positive liberty on an individual level as self-mastery, or rational self-direction, we thereby presuppose that there are two selves within a person – a lower and a higher one. The lower self is composed of our irrational impulses and desires, while the higher self is the reason within us, or our ideal nature. This definition of liberty is therefore based on the assumption of a specific structure of the personality (Stančić 2020, 26–29).

If we extrapolate this understanding to the collective level, the question arises regarding higher and lower factors within society, that is, of those who are more rational, competent, and educated, and those who need to be led and guided (Berlin 1992, 218). Consequently, the higher elements in society have the right to coerce the lower elements in the process of rationalisation. As Berlin adds, the higher self can be identified with a certain collective entity, such as the state, a party, the church, a race, or a nation (Berlin 1992, 48). In this way, a positive conception of liberty can serve as a justification for coercion, or indeed oppression, by those in power. These are the reasons why Berlin gives primacy to negative liberty as the fundamental meaning of liberty: “Liberty in its basic sense is liberty from chains, from prison, from servitude to others. Everything else is an extension of this meaning or a metaphor” (Berlin 1992, 61).

Berlin’s definition of liberty as *liberty from* is inextricably linked to his understanding of human nature itself. As Berlin points out, it is necessary to preserve at least a minimal area of individual liberty, so as not to deny our own essence: “Of a being whom others prevent from doing even the slightest thing of his own accord, there can be no moral speaking; he can be regarded as neither a legal nor an ethical human being” (Berlin 1992, 248). From this, it follows that the concept of negative liberty implies an individualistic conception of human nature, as opposed to an organicist one.

GREEN'S NORMATIVE THEORY OF LIBERTY

In this part of the paper, we will analyse the concept of liberty of the nineteenth-century English philosopher Thomas Hill Green. The socio-political circumstances in which Green considers the problem of liberty are those of the late Victorian period, which was characterised by the development of the capitalist market and economy, and increasingly pronounced social inequalities. Consequently, Green's position should be viewed through the prism of a specific socio-historical context.

Green addresses the question of liberty on both an individual and a collective level. In his definition of liberty, Green starts from the concept of negative liberty, seeking to expand its meaning. According to Green's understanding, negative liberty, understood as the absence of external impediments, represents the starting point for our very conception of liberty. Liberty, therefore, primarily implies the absence of coercion (Gaus 2000, 83). Liberty, understood in this way, however, is merely a means and not an end in itself; that is to say, it has instrumental, but not intrinsic, value.²

What, then, is true liberty for Green? When we speak of liberty as something we ought to value highly, we are speaking of a state in which people have realised their full potential, that is, have become the best version of themselves, Green emphasises. True liberty, therefore, consists in the exercise of the capacities with which people are endowed. At the collective level, liberty consists in the development and exercise of those human powers and capacities that contribute to the common good (Green 2011, 371). The common good, therefore, represents a normative ideal, which should be the prevailing motive of every individual (Green 2007, 31).

According to Green, positive liberty is, therefore, an extension of the negative concept of liberty and has intrinsic value. Unlike negative liberty, which can be characterised as morally neutral behaviour, positive liberty does not imply the right to do what we want, but rather what we ought to do. This conception of liberty can be characterised

² In this sense, Green cites the example of a savage, who is able to do as he pleases and who has no master. Although he is not a slave to other human beings, he is a slave to nature, and we do not consider him free. The first step towards true liberty is to submit to the laws of society, in order to develop the capacities with which he has been endowed as a human being (Green 2011, 371).

as normative. Consequently, liberty consists not only in the absence of external constraints, but also of internal ones, such as a morally defective, irrational, or heteronomous will (Green 2007, 30). Liberty on the individual level, Green, therefore, defines as autonomy: we are free if we are not governed by our lower impulses which we cannot control, if we are not driven by our delusions or irrational fears. When we determine whether someone is truly free or not, we are therefore assessing the nature of their ends and preferences.

According to Green's conception, true liberty at the collective level does not imply only the absence of external obstacles or coercion but also the possession of certain capacities and resources (Blau 2004, 548). It is precisely the presence of certain capacities and powers to act that distinguishes the positive from the negative conception of liberty. Consequently, the task of the state consists in providing the resources, or conditions, without which the free exercise of human capacities is not possible. Green's understanding of the state's role is based on his conception of liberty: if liberty is a value to be pursued, it must incorporate a demand for social justice (Dimova-Cookson 2004, 559). It is shown, therefore, that true liberty possesses a social dimension.

Accordingly, with regard to the institution of private property, according to Green's understanding, it is justified only as a means that enables the free exercise of the social capacities of all citizens. In other words, there is no true right to property if the given right prevents a group of people from such practice (Green 2011, 372). This stance of Green's reflects the aforementioned socio-political context in which Green considers the problem of liberty. Namely, increasingly pronounced social inequalities led Green to re-examine the notion that a society's liberty consists of the absence of state intervention, a notion characteristic of the teaching of classical liberalism. When it comes to the role of the state, Green, therefore, advocates the redistribution of resources.

Green's appeal for a greater role for the state is also reflected in his proposal to limit the liberty of contract in certain cases.³ Referring

³ In this sense, Green notes how we condemn slavery, even when one has voluntarily consented to it. Consequently, we deem it right to limit the liberty of contract whereby human beings, willingly or unwillingly, are treated as commodities, on the grounds that such contracts undermine the very purpose of contracting within society (Green 2011, 373).

to the disadvantaged position of workers, Green argues that the liberty of contract in employment should be restricted in order to improve the workers' position. Green here refers to limiting the number of working hours for women and children, improving working conditions in factories, and banning the purchase or rental of residential units that endanger people's health (Green 2011, 373).

In response to such proposals, Green points out that "some political speculators" ask the question: 'Shouldn't it be left to individuals to judge for themselves, and over time learn not to accept jobs that are bad for them, to avoid buying houses that do not meet basic standards, and that children should attend school?' Green certainly agrees that it would be better if all this were to happen spontaneously, that is, if there were no need for legal compulsion. However, as he points out, we must accept people as they are at present, and until such a state is achieved, we must entrust the state with the task of providing better living and working conditions (Green 2011, 375).

Green also proposes limiting liberty of contract when it comes to the sale of alcohol – 'in the interest of general liberty' (Green 2011, 382). Green justifies this right of interference, that is, of preventing people from doing what they want, on the grounds that it is justified to restrict the liberty to buy and sell certain goods, if the consumption of such goods leads to a breach of public order or if it prevents people from developing their potential (Green 2011, 383). As Green further states, drunkenness, besides endangering the individual, also endangers others, such as family members (Green 2011, 384). The experience of certain communities shows that the removal of alcohol shops contributes to a reduction in alcoholism. In contrast to Green's proposal, critics of the state interventionist position argue that people should be left to their own devices. Green, however, emphasises that state interference in individual liberty is justified if the exercise of such liberty constitutes an obstacle to the common good (Green 2011, 384). Green concludes his lecture on liberal legislation and liberty of contract with the following words: "When all the temptations which the law can remove have been removed, there remains enough room for the play of our moral energies" (Green 2011, 386).

Summa summarum, Green's theory of liberty can be characterised as normative, on the grounds that on a collective level it presupposes the existence of the common good, which represents a normative ideal. This determination of liberty is undeniably attractive, thanks to

its connection with a value such as social justice. We can also accept Green's view that for a person on the brink of existence, the liberties provided by law are of little importance. If, for example, we are given the right to liberty of movement, so that every citizen can travel to Mauritius, someone who is unwell or poor will be unable to exercise that right. It is therefore indisputable that we need to possess certain capacities and resources in order to be able to practise negative liberty. Can we, however, consider the absence of these capacities to be an absence of liberty?

If we accept Berlin's thesis on pluralism of values, it implies that the essence of values lies in their incommensurability and potential incompatibility. In other words, not all good things necessarily go together – values, not only in practice but also in principle, are not and cannot be harmoniously reconciled. Berlin bases this position on the fact that we do not, and cannot, have any *a priori* knowledge that there is a mutual consistency between all human ends (Berlin 1992, 255). We must therefore rely on empirical experience, which tells us that values can come into conflict: liberty can jeopardise the realisation of some other value, just as some other values, such as justice or equality, can jeopardise liberty itself. Consequently, Green's advocacy for the state to redistribute resources should not be called a demand for more liberty, but rather a demand for equality and social justice. What, therefore, makes Green's conception of liberty inadequate is its identification of liberty with other attractive values, such as equality and social justice.

On this occasion, it is important to emphasise that Berlin himself agrees with Green's position that it is the state's task to provide citizens with certain resources. In this sense, Berlin shares Green's view that the position of the worker should be improved, stating that they require certain resources in order to realise negative liberty – which would otherwise represent merely a 'barren achievement' (Berlin 1992, 54). Berlin, however, does not share Green's view that providing such means should be considered an increase in liberty, but rather an increase in capacity and resources, such as education, health, and material well-being. Accordingly, if someone is unable to travel to Sicily, for example, because they are unwell or lack the money to do so, we cannot call this an absence of liberty.

In this sense, we agree with Berlin's view that it is necessary to avoid equating liberty itself with the conditions for liberty, or extending the concept of liberty to encompass other values, such as happiness,

social justice, or equality, since the values are incommensurable and potentially mutually incompatible. As Berlin emphasises, one should not call 'every desired change in man's position' liberty, because the term 'liberty' would thereby become too broad and imprecise (Berlin 1992, 246).

On the individual level, the normativity of Green's theory of liberty is reflected in his definition of liberty as the right to do what one ought, rather than what one wants. Liberty is, therefore, equated with another desirable value – morality. If we accept Berlin's premise of an irreducible pluralism of values, this moralisation of liberty proves to be inadequate. Like any other value, liberty should be valued as an end in itself, regardless of whether it produces some good or contributes to the realisation of some other value. Furthermore, as we have already pointed out, all good things do not have to be mutually compatible - values can come into conflict. Consequently, Green's critique of negative liberty as a value that represents only a means and a condition of liberty, and not an end in itself, proves to be unsuccessful. The demand for individual liberty is founded on an understanding of human nature itself; liberty of choice is an inherent characteristic of human beings. It is precisely in this that the intrinsic value of individual liberty lies, which, therefore, does not depend on the nature of our goals and preferences.

TAYLOR: OPPORTUNITY-CONCEPT VS. EXERCISE-CONCEPT OF LIBERTY

In his definition of the concept of liberty, the contemporary philosopher Charles Taylor departs from Berlin's distinction between two concepts of liberty – positive and negative. Namely, Taylor shares Berlin's view on the existence of two distinct concepts of liberty, highlighting how behind this dichotomy lies a bigger difference in doctrines. This is the difference between the concept of possibility and the concept of practice. As Taylor notes, Berlin defines negative liberty as the individual's independence from interference by the authorities or other persons, while positive liberty is essentially concerned with the question of who has control over our lives. Taylor, however, seeks to reformulate these views, emphasising how positive theories of liberty rely on the concept of practice, which implies that to be free is to actively shape one's own life, or to exercise control over it. In contrast, negative theories of liberty can simply be based on the concept of possibility,

where being free has to do with what we can do, or which solutions are open to us, regardless of whether we actually do anything (Taylor 1979, 177).⁴

As an example of this conception of liberty, Taylor cites the views of Hobbes and Bentham, according to which liberty consists in the absence of external physical or legal obstacles. This view, in Taylor's opinion, neglects the less obvious limitations on liberty, such as a lack of awareness or false awareness; consequently, it implies that to speak of internal factors of liberty is a 'misuse of language'. If, however, liberty implies self-realisation, then, in addition to external ones, we can speak of internal limitations on liberty, Taylor points out, adding that, in this sense, Hobbes's and Bentham's concept of liberty is based on a simplified moral psychology (Taylor 1979, 176).

Negative theories of liberty, which assume the existence of exclusively external limitations on liberty, according to Taylor, were formed under the influence of materialist and anti-metaphysical thought, that is, thought oriented towards the natural sciences, as well as a fear of totalitarian dangers. The advantage of the concept of liberty as the absence of external obstacles certainly lies in its simplicity: liberty is defined as the possibility of doing what we want, without questioning whether we might be mistaken about our own desires.

However, according to Taylor's view, we can be mistaken when it comes to our emotions and desires. To support this position, Taylor first considers the feeling of pain. Namely, if during a particular medical procedure we do not feel pain, then pain does not really exist; therefore, a mistaken perception is not possible when it comes to this type of feeling (Taylor 1979, 187). This, however, is not the case when it comes to our fundamental desires; unlike the sensation of pain, we can misperceive a certain goal as fundamental. Our fears, for example, can be irrational, as can our feelings of shame, in contrast to the sensation of pain, which cannot be.

According to Taylor's understanding, human beings can therefore be prone to self-deception and a lack of self-control; that is to say,

⁴ It is important, in this regard, to emphasise that, according to Taylor, negative theories of liberty can rely on the concept of possibility, but not necessarily; certain theories of negative liberty involve some form of self-realisation. Thus, whilst negative theories can be based on both the concept of possibility and the concept of practice, the same is not true of positive theories of liberty, which exclusively imply the concept of practice (Taylor 1979, 177).

they can be mistaken about their goals and purposes, and thus any concept of liberty that does not include the existence of internal limitations on liberty is not sustainable. In this sense, as Taylor states, we cannot say that someone is free if, for example, they are not aware of their potential; liberty, therefore, among other things, also implies a certain degree of self-understanding (Taylor 1979, 177).

Therefore, if people can be mistaken in their choice of basic goals, or if the individual is not the ultimate arbiter when it comes to their own liberty, an important question arises: Does this mean that people can be forced into liberty by those wiser than themselves? In other words, if this conception of liberty is carried over to the collective level, does it open the door to totalitarianism? Taylor's answer to this question is negative; a positive conception of liberty, which implies the existence of internal obstacles, i.e., the possibility of error, does not necessarily imply the imposition of a specific official doctrine by the state (Taylor 1979, 180). Individuals differ in their form of self-realisation, and so we cannot speak of a specific mode of self-creation that would apply to all people.

Taylor's conception of liberty as the active overcoming of internal obstacles is based on the so-called 'fact of strong valuation' (Taylor 1979, 184). This refers to the existence of first- and second-order desires; that is to say, we can have desires (of the first order) that are different, and even contradictory. In that case, we are compelled to evaluate our essential goals and desires and, consequently, to make a choice between them by retaining certain desires and rejecting others. Second-order desires are desires about desires, that is to say, they refer to first-order desires (Frankfurt 1971, 6). This way of thinking about liberty originates with the philosopher Harry Frankfurt, who, in his examination of liberty, sought to explain the concept of the person.

According to Frankfurt, understanding what we essentially are constitutes a central philosophical question. The distinctive feature of human beings in relation to other creatures lies precisely in our structure of will (Frankfurt 1971, 6). Indeed, animals can also have motives and desires and can make decisions, which makes them subjects of first-order desires. What constitutes the essential characteristic of human beings is the ability of self-reflection, or self-evaluation. What, therefore, distinguishes humans from other creatures is precisely our ability to desire to be different with regard to our ends and preferences, that is, to desire to have or not have certain desires and motives (Frank-

furt 1971, 7). Consequently, humans are subjects of both first-order and second-order desires.

A second-order desire is when we want one of our desires (a first-order desire) to become our will. As an example, Frankfurt cites a person who has a desire to take drugs, but who, on the other hand, wants to stop the addiction (Frankfurt 1971, 12). These two first-order desires are evidently in conflict with each other. If the aforementioned person prefers one of these desires, that is, if they want, for example, the desire to quit their drug addiction to be effective and constitute their will, we can speak of the existence of a second-order desire. It is shown, therefore, that a second-order desire exists when, for a given person, first-order desires are not equally acceptable, or when one of the conflicting desires constitutes a part of their identity.

What is important to note regarding Frankfurt's position is that second-order desires do not necessarily manifest a moral stance, and that first-order desires are not evaluated exclusively from a moral perspective. Furthermore, a person who possesses a desire about desires can be irresponsible or capricious, which shows that second-order desires are in fact preferences, regardless of what they are based on (Frankfurt 1971, 13).

Taylor therefore shares Frankfurt's understanding of the structure of the will, or his view on the existence of first- and second-order desires. His phrase, 'the fact of strong valuation' implies that we experience our purposes, motives, and desires as qualitatively different, that is, as relevant or trivial, higher or lower, noble or not (Taylor 1979, 184). If, for example, we are guided by defiance, we consider such a motive to be bad in itself, regardless of its intensity. We may be overwhelmed by a certain desire at a given moment, and yet consider it bad, which shows that our criteria for choosing our first-order motives and desires are not quantitative, but qualitative.

To illustrate this stance, Taylor cites the case of a person whose malicious and spiteful reactions, which they can barely control, jeopardise a relationship with another person whom they care deeply about (Taylor 1979, 185). The motives of such a person are, therefore, in conflict with one another; what makes the essential difference between them is that in the event the aforementioned person chooses to give up their destructive behaviour, they do not lose any satisfaction, true good, or pleasure. In other words, they do not lose a part of their identity. Furthermore, such behaviour constrains the person, so, according to

Taylor's understanding, they would be less free if they were guided by such behaviour (Taylor 1979, 192). The existence of internal limitations on liberty, even when there are no external obstacles, therefore implies the existence of a degree of liberty.⁵

What is essential to emphasise when it comes to conflicts between our first-order goals and desires is that, according to Taylor, there are two types of this kind of conflict. To illustrate this point, Taylor gives the example of a person who is torn between their marriage and their career. Namely, if she wants to devote herself to a fulfilling job, the person in question is forced to be away from home frequently, which jeopardises her relationship with her spouse, to whom she is very attached. These two desires are, therefore, mutually exclusive. However, unlike the previous example of a person prone to destructive behaviour, here we are dealing with two desires that represent an expression of the personality, or rather, a part of the person's identity. The person prone to malicious behaviour is constrained by this motive, and wishes to be rid of it. Although such feelings undeniably belong to that person, they represent an obstacle to their fundamental purposes and, consequently, to their liberty. In contrast, we cannot say that a person who wishes to dedicate themselves to a career would be freer if they were to renounce that desire, because they can identify with it, just as with the desire to preserve a marriage (Taylor 1979, 188).

To summarise Taylor's position, we can conclude that there are certain points of contact between Berlin's and Taylor's views. Berlin shares Taylor's criticism of the concept of collective self-realisation, which consists of the state imposing a specific vision of the common good. What Berlin does not agree with, however, is the identification of liberty itself with self-realisation. Berlin, therefore, questions the Enlightenment ideal of rational self-improvement; people can freely and

⁵ Taylor's view that, in addition to external, there are also internal limits to liberty is shared by the contemporary authors Adam Swift and John Gray. This understanding implies a positive definition of liberty, that is, a definition of liberty as autonomy, which involves the active overcoming of internal obstacles. According to Gray, liberty as the mere absence of external constraints does not represent an end in itself. Liberty understood as autonomy, which involves rational deliberation and reflection, represents an end in itself (see Gray 1980). Swift also equates liberty with autonomy, which consists in rational self-direction (see Swift 2008). Both authors therefore emphasise the importance of our rational capacities.

consciously choose another goal, one that is more significant to them. The implication of this understanding is that, contrary to Taylor's position, the individual is the ultimate judge when it comes to their own liberty. This stance constitutes the fundamental assumption of the negative conception of liberty (Stančić 2020, 63).

If we do not reduce liberty to self-realisation, we can still characterise a person who behaves morally wrongly or irrationally as free. This stance is contrary to Taylor's understanding of the necessary connection between an individual's liberty and their ends, motives, and preferences. Someone, therefore, can freely choose 'bad' goals; we can call them stupid or evil on that basis, but not unfree. It follows from this that the advantage of the negative conception of liberty lies in the fact that we are able to discuss whether a particular person is free or not, regardless of the fact that we do not know their motives and goals (Stančić 2020, 67). Questions about the origin and nature of values, desires, and beliefs of a certain person represent an intrusion into the private sphere of an individual, which, according to the tradition of classical liberalism, should be outside the interference and control of other individuals or the state. In this sense, such questions represent, in a certain way, a violation of the integrity and dignity of the individual.

CONCLUSION

The definition of liberty is inherently linked to the understanding of human nature itself; our concept of liberty is founded on our conception of human nature. In this sense, the different, and often contradictory, definitions of liberty are the result of differing understandings of what constitutes the essential characteristics of human beings. Given that the question of liberty is one of the central subjects of philosophical consideration, we can agree with Berlin's observation that the aim of philosophy is to 'help people understand themselves' (Berlin 1980, 11).

In this paper, we have sought to show the advantage of the negative conception of liberty over the positive, that is, the conception of liberty as the absence of external, rather than also internal, obstacles to liberty. The recognition of internal obstacles to liberty is common to all conceptions of autonomy. This understanding implies a rejection of the idea that liberty consists in doing what we want. In other words, one can do what one wants and yet not be free. From this, it follows that

there is a necessary connection between an individual's liberty and their preferences.

In contrast to this view, our aim was to show that there is no necessary connection between an individual's liberty and their motives and ends, and that liberty equally implies the right to act irrationally or morally wrongly. Starting from Berlin's premise of an irreducible pluralism of values, it is shown that liberty, defined as the absence of coercion, is an end in itself, regardless of whether it produces some good, that is, whether it contributes to the realisation of some other value, such as morality, happiness, equality, or social justice.

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ДА ЛИ ПОСТОЈЕ УНУТРАШЊА ОГРАНИЧЕЊА СЛОБОДЕ? БЕРЛИНОВО СХВАТАЊЕ НАСУПРОТ СХВАТАЊИМА ГРИНА И ТЕЈЛОРА**

Резиме

Предмет овог рада јесте питање слободе, које заузима централно место у оквиру филозофских и друштвено-политичких расправа. Проблем слободе био је предмет разматрања још од античких времена. Међутим, још увек не можемо говорити о постојању једне дефиниције слободе са којом би се сви сложили. Различите дефиниције слободе резултат су различитих схватања онога што се може сматрати субјектом слободе, као и онога што може представљати ограничење слободе. Овај рад бави се дефиницијом слободе у односу на то како дефинишемо њено ограничење. Полазна премиса овог рада јесте Берлинова дефиниција негативне слободе као одсуства спољашњих препрека, односно принуде. Затим ћемо анализирати критике овог схватања слободе, које се свде на тврдњу да, поред спољашњих, можемо говорити и о унутрашњим препрекама слободи. Оне обухватају нормативну теорију слободе Томаса Хила Грина, као и схватање слободе као аутономије Чарлса Тејлора. Оно што је заједничко овим критикама јесте њихово напуштање идеје да се слобода састоји у праву да чинимо оно што желимо, или схватања да постоји нужна веза између слободе појединца и његових мотива и циљева. Циљ рада јесте да покаже предност негативног схватања слободе у односу на позитивно, односно дефиниције слободе као одсуства спољашњих, а не унутрашњих препрека слободи.

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Кључне речи: Исаија Берлин, Чарлс Тејлор, Томас Хил Грин, аутономија, позитивна слобода, негативна слобода

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REVIEWS

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Review

Српска политичка мисао
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SPEECH ON THE 105TH ANNIVERSARY OF THE COMMUNIST PARTY OF CHINA AND THE 15TH FIVE-YEAR PLAN Belgrade, 30 June 2026

This meeting is dedicated to the Communist Party of China's great anniversary: its 105th anniversary. The numbers speak volumes, as surviving for 105 years is a truly magnificent achievement for any political party. This is especially true of the Communist Party of China (CPC). When the CPC was established, it was a group of around 50 enthusiasts inspired by Marxist ideology, seeking to change the reality of a humiliated China, oppressed by foreigners, ruled by warlords fighting against one another, and dominated by peasants who were suffering greatly from poverty, illness, violence, and other hardships.

At the beginning, the Party learned from foreigners, especially the Communist Party of the Soviet Union. However, very soon CPC's leaders realised that, if they wanted to succeed, they needed to focus on domestic Chinese conditions. When they turned their attention and political mobilisation towards the countryside and the peasants, they gained the nation's real power behind them. They managed to defeat the occupying forces, liberate the country, and re-establish a great Chinese

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state. Over the years and decades that followed, and even today, China has continued to work towards completing the process of national unification, because the Chinese Constitution states that it is a sacred duty of every Chinese citizen to fight for a truly and fully reunified China.

Over the decades, the CPC fought, grew, and learned, ending centuries of humiliation and establishing the People's Republic of China, an independent country, on October 1, 1949. However, the conditions were especially severe because the People's Republic of China was isolated. Taipei was recognised by the dominant Western political bloc, while the People's Republic of China remained isolated and could not represent the Chinese people in the UN.

Nevertheless, CPC leaders did not give up despite the injustices and the expulsion from the UN. They continued to build the state's institutions, industrialise the country, and work for the benefit of the majority of the people. That first phase, which also included tremendous political violence, suffering, mistakes, and periods of considerable success that brought advancement and well-being of all kinds – a mixture of these elements – led the People's Republic of China into what could be called the second phase of its history and of the CPC's history: the period of implementing the reform and opening-up policy (The National Committee of the Chinese People's Political Consultative Conference [NCCPPCC] n.d.).

This was the era of the paramount Chinese leader at the time, Deng Xiaoping, and his reformist group, which gained a leading position in the CPC Central Committee. At the Third Plenary Session of the 11th CPC Central Committee, they decided to reform China, begin deep reforms, and open the country to the world, and formulated their policies based on reality – “seeking truth from facts”, learning from them. This meant departing from the rigid ideological course that had guided China during the previous period and proved devastating.

They decided to focus on reality and facts, basing new solutions on the existing problems of the Chinese state, economy, society, and cultural environment. China had been devastated by the previous period of political instability and was lagging behind some of its neighbours, a few of which had moved from Third-world status into the elite group of First-world economies, such as South Korea, Hong Kong (then a British colony), Taiwan, Singapore, and, of course, Japan, a leading model for the others to follow. Chinese leaders saw that China, once the

leading civilisation and state among its neighbours and beyond, which dominated the global economy, culture, and technology, had, by the end of the 20th century, lagged behind many of them, isolated, poor, egalitarian, and far below its true potential. They decided to “wake up” these potentials and lead China to stand up again among the world’s leading nations.

China sought to learn from the world about new technologies, a free-market economy, modern trade, management, international financial organisations and their roles, various political and economic systems, and other elements of dynamic and successful economies of the time, as well as the experiences of other countries. Chinese leaders drew on Western, Eastern, and neighbouring experiences to rethink other models, identify the one most appropriate for China, and implement it. As we know, they were extremely successful.

The reforms, which included introducing market forces into the economy, began in the countryside. They unleashed the great creativity and entrepreneurial spirit of the Chinese people, yielding tremendous results that greatly improved peasants’ lives and increased peasants’ savings. These savings provided the basis for Chinese leaders to begin further reforms, often called “urban reforms” but in fact reforms of Chinese industry, education, the military, and other areas beyond the “Four Modernisations”.

Of course, this also included technological upgrading, the expansion of productive forces, entry into the global market, and the introduction of a system previously unknown in China for decades. From the beginning of PR China, everyone knew the prices of everything; now prices were beginning to change, mostly going upwards, and market forces were entering people’s everyday reality. The era of “eating from the same iron pot” or total equality was over. For the first time, workers could lose their jobs, but also be rewarded for better work. The same applied to factory managers and to work units across various sectors of the economy. Industrial or trade factories could go bankrupt, but also make a profit and grow while competing with others.

The concept of Socialism with Chinese Characteristics was introduced in 1982 by Deng Xiaoping at the 12th National Congress of the Communist Party of China, emphasising Chinese characteristics (International Department, Central Committee of the Communist Party of China [IDCCCPC] 1982). China has been modifying and reinforcing the concept of socialism by focusing on its own needs and conditions,

introducing the market economy while remaining a socialist country. Chinese leaders were learning from their mistakes and testing major new ideas on an experimental basis. If experiments carried out in certain municipalities or areas proved very successful, they were then spread across the country and introduced more broadly. Step by step, reform by reform, and by expanding into the global market, China learned from its early experiences and from others, creating special economic zones and open coastal cities and areas as “free market entities”, with even a different legal system from the country’s main one and special preferences for foreign companies invited to operate there. Its coast still hosts around 60% of its export-oriented industries, making it very convenient to export by cargo ship from numerous Chinese ports, strategically located across Hong Kong, Taiwan, Japan, etc.

Today, seven of the ten busiest global ports are in China. However, before today’s situation, in which China is admired and its model and success are influential, Chinese reformers faced a long, bumpy road. Let me remind you that all these reforms were conceived, planned, introduced, and controlled by the Communist Party of China and its brave and wise reformist leaders. Many inside the Party, or at least some, questioned whether this was the right way, whether introducing markets was wrong, whether China should stick to previous solutions, and whether the Marxist doctrine would be betrayed if so. But the reformist core prevailed and continued, although not without occasional disruptions from inside and from abroad. The Party followed the Four Cardinal Principles: maintaining the socialist road, the people’s democratic dictatorship, the leadership of the CPC, and Marxism-Leninism and Mao Zedong Thought (IDCCCPC 2018).

Along the way, through learning from practice and ideological work, the CPC underwent a new theoretical upgrade, including Jiang Zemin’s “Three Represents”, under which the Party must represent the most advanced productive and cultural forces of society and the fundamental interests of the majority of the people (Embassy of the People’s Republic of China in the Republic of Bulgaria 2004). This significantly and strategically broadened the Party’s base, as the CPC became not only a working-class party but also one that represents the most advanced productive forces, including new private entrepreneurs.

Later, Hu Jintao’s “Scientific Outlook on Development” emphasised that development should be grounded in scientific research and findings, and that China should build a Harmonious Society

to address wealth inequality, social injustices, and environmental degradation caused by the extremely rapid growth of previous decades (The State Council Information Office [SCIO] 2022). It also emphasised sustainable growth, which should be more balanced and people-oriented, and lead to sustainable socio-economic development.

The Party articulated the CPC's previous general secretaries' ideas and transformed them into a continuous endeavour, framed by the Five-Year Plans and by daily work and learning on the road of reform. That continuity, and the ability to look far ahead – to think about where China should be in 50 or 100 years, and about the two centenary goals that we have heard about, namely where China should be in 2021 and where China should be in 2049, on the 100th anniversary of the founding of the People's Republic of China – show that these leaders had great vision. They were courageous, creative, strong, and knowledgeable enough to introduce new solutions and build the path towards a successful future.

China used five-year plans to implement what was conceived as party doctrine and to provide developmental direction and solutions for a set period. The five-year plans introduced specific policies for the period for which they were adopted – the next five years – while keeping in mind the final vision and the achievement of goals and results that the Party set as priorities. Different external environments, stages of Chinese development, and the needs of the Chinese people required different policies. Through reforms, China lifted around 800 million people out of poverty. That is a real contribution to all of humankind. It is even more significant when we consider that some of these results were achieved at a time when the international community was less friendly towards China than it had been at the beginning of Chinese reforms.

Many Western analysts ask whether China's reforms were focused solely on economic outcomes. China first became a global manufacturing powerhouse. After joining the World Trade Organisation in 2001, China became the largest global exporter, the second-largest importer, and the largest global trading power. From that point onward, China's economic development relied predominantly on exports as its engine of growth. Chinese growth was unprecedented in modern economic history. For more than 30 years, China grew at around 9,6% per year. That was, as I said, unprecedented. Between 1960 and 2000, China's GDP per capita rose from \$96 to \$965. In the next twenty years, from 2001 to 2020, the Chinese economy expanded by approximately tenfold. One can imagine Chinese people living through those 10 or 20 years, witnessing

their country and economy grow so rapidly. China's economic growth represents one of the most significant transformations in modern history. According to World Bank data, China's GDP increased from approximately US\$1.22 trillion in 2000 to US\$18.74 trillion in 2024 (World Bank Group 2026).

For the first time in Chinese history – Chinese history is at least 2.000 years old as a continuous civilisation, because China is also a civilisation-state – most Chinese citizens began living in cities, driven by intense industrialisation and urbanisation that followed, with hundreds of millions of workers moving from the countryside into existing and newly built cities. The year 2011 marked a historic turning point, when more than half of the Chinese population lived in cities for the first time. Official data from the National Bureau of Statistics showed that the urban population reached 51,27% (about 690.79 million people), officially surpassing the rural population (China Data Portal 2024). China then became the second-largest economy in the world, measured by nominal GDP in US dollars. Using purchasing power parity, China had already become the largest global economy by 2014 (World Bank Group 2024; Worldometer 2026).

The 14th Five-Year Plan and the ongoing 15th Five-Year Plan have moved China towards a new, higher-quality production base and have transformed Chinese society in a way almost unprecedented in global history, especially in such a short period of several decades. Chinese industry has begun to be based on high technology, digitalisation, artificial intelligence integrated into the industrial ecosystem, robotics and green energy.

Of course, China has invested heavily, with the state organising these investments through five-year plans under the leadership of the Communist Party of China (The State Council of the People's Republic of China [SCPRC] 2025). The Party is horizontally organised and, for that reason, has been able to control the implementation of these plans from local communities to the central government. China invested heavily in world-class research, education, and the empowerment of its military, which became one of the most powerful militaries globally – a very respected, technologically advanced force.

The Chinese navy is especially fascinating, and so is the Chinese merchant fleet, the largest in the world. After centuries of neglecting its maritime potential, China has once again become a maritime power, as well as a terrestrial one. China now has first-class logistics in its ports,

thanks to modern technology and AI. At the same time, Chinese research and its results in materials science and chemistry have been applied to batteries for electric vehicles and energy storage. This ecosystem has enabled China to become a superpower in electric-vehicle production, with roughly 75% global dominance and 50% of global electric-vehicle sales. China dominates the entire EV lifecycle, from critical mineral sourcing and refining to battery cell manufacturing to car design and production. It is a decade ahead of all other competitors in this production (Information Technology and Innovation Foundation 2026).

China is also highly competitive in batteries and solar panels because it is a global leader in advancing the green energy transformation, from people's lives in local communities to research and the transfer of results across various industries and services. Because these products are high-quality and relatively inexpensive, they are exported to developing countries as they become available. Today, in many African countries, people have electricity for the first time in their lives. Traditional grids were never introduced in many areas, but now, thanks to ICT and new forms of high-tech green energy connectivity, these areas and countries have access to electricity.

Xi Jinping, the core leader of the CPC and China, presented his "Thought on Socialism with Chinese Characteristics for a New Era" (The Academy of Contemporary China and World Studies [ACCWS] 2022), which consists of 14 principles, in his political report at the start of the party's 19th National Congress on 18 October 2017, and it was soon written into the Communist Party's constitution (IDCCCPC 2018) and the National Constitution of the People's Republic of China in March 2018 (SCPRC 2019). The essence of Xi Jinping's theory is national rejuvenation, absolute party leadership, integrating Marxism with traditional Chinese culture and conditions as the reality of Chinese socialism, deepening the Party's and China's reforms while pursuing high-quality economic growth and technological self-reliance, and sharing China's achievements with a changing world. It sets out a strategic roadmap to transform China into a leading global power, resilient, advanced, and oriented towards peace and domestic and global development. He stressed the Party's leadership over all work, as "among the Party, the government, the military, the people, academia and all circles, the Party leads all" (Xinhua 2018).

One of the core strategies of Xi Jinping's Thought on Socialism with Chinese Characteristics for a New Era is the goal of achieving

the “great rejuvenation of the Chinese nation” by 2049, marking the 100th anniversary of the People’s Republic of China (Hu, Zhou, and Xie 2025). It also stresses that realising complete national reunification is an inevitable requirement for fulfilling that goal.

When discussing Xi Jinping’s Thought on Socialism with Chinese Characteristics for a New Era, we should consider his remarks on once-in-a-century global changes, as well as the difficult environment China faces due to containment and the Political West’s binary approach (Hu, Zhou, and Xie 2025). In the New Era, China has had to find appropriate answers to build resilience to global challenges. In the New Era, Chinese leader Xi Jinping introduced a vision that has led China to launch four global initiatives: the Global Civilisation Initiative, the Global Development Initiative, the Global Governance Initiative, and the Global Security Initiative. They are based on his theoretical stance that realising the Chinese Dream is inseparable from a peaceful international environment and a stable international order. That is why China has to be “the builder of world peace, the contributor to global development and the defender of the international order” (Xinhua 2018).

Driven by the strategic pursuit of the two centenary goals – completing a moderately prosperous society by 2021 and transforming China into a modern socialist country by 2049 – the Chinese dream of national rejuvenation has prompted the Central Party Committee to innovate in diplomatic theory and practice. While ensuring continuity in China’s foreign policy, it has introduced new ideas and proposals with distinct Chinese characteristics that reflect contemporary aspirations and aim for broader human progress (Yang Jiechi 2017).

We can frame the four global initiatives as part of a new global governance strategy and framework for achieving the goals of humanity’s shared future. It is a vision that China, as a responsible major power, is offering to the world in the field of “major country diplomacy” and as one of the leaders of the global new multipolarity. It is not only the idea that the world should be more just and equitable, but also the belief that all countries, civilisations, ethnic groups, and historical experiences should be treated equally. Many people wish for and desire that. But China and other partners in BRICS+, the Shanghai Cooperation Organisation, and other initiatives led by China, by China and Russia, and by other emerging major countries also possess power – financial power, energy power, demographic capacity, production power, trade power, technological power, and political will.

For the past 10 years, China has been among the world's top three investors. Financial, production, trade, technological, and political power are also being focused and organised to reform existing international organisations, all grounded in international law and the United Nations Charter, for the good of humanity. The aim is for every country to have not only the right, but also the possibility, to pursue development, to improve the living conditions of its people, to be respected as an equal, and to be included in the financial, production, trade, and security tools and mechanisms that have been and will be further developed within these groupings, building a new multipolarity. What, then, is China offering to the world, including through the Belt and Road Initiative, the 16+1 format, China-Africa cooperation, China-Latin America cooperation, and other formats? Serbia, luckily, plays an important role in these initiatives, as a reliable, long-standing friend of the People's Republic of China and the Communist Party of China.

I am returning to tomorrow's date once again: the CPC will mark an impressive anniversary tomorrow, and it can be extremely proud of its achievements. The achievements of the Communist Party of China are people-centered; they were not for the benefit of a single leadership, a single leader, or a small group of extremely wealthy people. They were achievements for the Chinese nation and for humankind. As Xi Jinping's Thought points out, the Party must adhere to the principal position of the people, serve the public interest, and govern the country for the people. To keep the Party ready and up to its calling, Xi insists on "developing a positive and healthy inner-party political culture, resolutely correcting all kinds of unhealthy tendencies, cracking down on corruption with a zero-tolerance attitude [...] and always maintaining the Party's flesh-and-blood ties with the masses of the people" (ACCWS 2022).

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AUTHOR GUIDELINES

The academic journal *Serbian Political Thought* publishes articles that result from the latest theoretical and empirical research in the field of political science. Authors should refer mainly to the results of scientific research published in academic journals, primarily in political science journals.

Manuscripts should be submitted in Serbian (Cyrillic script) with a mandatory English translation, or in English.

The journal is published six times a year. The deadlines for submitting the manuscripts are February 1st, April 1st, June 1st, August 1st, October 1st, and December 1st.

Two consecutive issues cannot contain articles written by the same author, whether single-authored or co-authored.

Papers are submitted to the Editorial Board by uploading them to the CEON platform using the following link: <https://aseestant.ceon.rs/index.php/spm/login>.

Authors are obliged to submit a signed and scanned declaration of authorship when submitting their works. The declaration form can be downloaded from the journal's website: https://www.ips.ac.rs/en/magazines/srpska-politicka-misao/authors_directions/

All submitted manuscripts are checked for plagiarism or auto-plagiarism. Various forms of chat boxes and other artificial intelligence software cannot be (co)authors of the papers under consideration. These tools can only be used for stylistic language editing, not for writing sections of the paper, and authors who use them are obliged to specify the purpose of using such tools at the point where they are used.

Authors are required to provide their ORCID numbers along with their (preferably) institutional email addresses, which they include in the manuscript text in a footnote alongside their names and surnames.

Research articles can have up to 40,000 characters with spaces, including footnotes. When counting the characters leave out the reference list. Exceptionally, a monographic study can be larger in scope in accordance with the provisions of *the Rulebook on procedure, method of evaluation, and quantitative presentation of scientific research results*.

Reviews can have up to 15,000 characters with spaces.

Book reviews can have up to 10,000 characters with spaces.

CITING AND REFERENCING

The journal *Serbian Political Thought* uses a partially modified Chicago style of citation (17th edition of the *Chicago Manual of Style*), which implies specifying bibliographic parentheses (brackets) according to the author-date system in the text, as well as a list of references with full bibliographic data after the text of the paper.

Data in bibliographic parentheses and the list of references should be written in Latin script.

Below are the rules and examples for citing the bibliographic information in the reference list and in the text. For each type of source, a citation rule is given first, followed by an example of citation in the reference list and bibliographic parenthesis.

The bibliographic parenthesis is usually set off at the end of the sentence, before the punctuation mark. It contains the author's surname, the year of publication, and page numbers pointing to a specifically contextual page or range of pages, as in the following example: (Mearsheimer 2001, 15–17).

Books

Books with one author

Surname, Name. Year of publication. *Title*. Place of publication: Publisher.

Mearsheimer, John J. 2001. *The Tragedy of Great Power Politics*. New York: W. W. Norton & Company.

(Mearsheimer 2001)

Books with two or three authors

Surname, Name, and Name Surname. Year of publication. *Title*. Place of publication: Publisher.

Brady, Henry E., and David Collier. 2010. *Rethinking Social Inquiry: Diverse Tools, Shared Standards*. Lanham: Rowman & Littlefield Publishers.

(Brady and Collier 2010, 211)

Pollitt, Christopher, Johnston Birchall, and Keith Putman. 1998. *Decentralising Public Service Management*. London: Macmillan Press.

(Pollitt, Birchall and Putman 1998)

Books with four or more authors

Surname, Name, Name and Surname, Name and Surname, and Name and Surname. Year of publication. *Title*. Place of publication: Publisher.

Pollitt, Christopher, Colin Talbot, Janice Caulfield, and Amanda Smullen [Pollitt *et al.*]. 2005. *Agencies: How Governments do Things Through Semi-Autonomous Organizations*. New York: Palgrave Macmillan.

(Pollitt *et al.* 2005)

Editor(s) or translator(s) in place of the author(s)

Surname, Name, Name and Surname, ed. Year of publication. *Title*. Place of publication: Publisher.

Kaltwasser, Cristobal Rovira, Paul Taggart, Paulina Ochoa Espejo, and Pierre Ostigoy [Kaltwasser *et al.*], eds. 2017. *The Oxford Handbook of Populism*. New York: Oxford University Press.

(Kaltwasser *et al.* 2017)

Chapter in an edited book

Surname, Name. Year of publication. "Title of the chapter." In *Title*, ed. Name Surname, pages range. Place of publication: Publisher.

Lošonc, Alpar. 2019. "Discursive dependence of politics with the confrontation between republicanism and neoliberalism." In *Discourse and Politics*, eds. Dejana M. Vukasović and Petar Matić, 23?46. Belgrade: Institute for Political Studies.

(Lošonc 2019)

Journal Articles

Regular issue

Surname, Name. Year of publication. "Title of the article." *Journal* Volume, if available (issue): page range. DOI.

Ellwood, David W. 2018. "Will Brexit Make or Break Great Britain?" *Serbian Political Thought* 18 (2): 5?14. DOI: 10.22182/spt.18212018.1.

(Ellwood 2018)

Newspapers and magazines

Signed articles

Surname, Name. Year of publication. "Title of the article." *Newspaper/Magazine* Date: page range.

Clark, Phil. 2018. "Rwanda's Recovery: When Remembrance is Official Policy." *Foreign Affairs*, January/February 2018: 35–41.

(Clark 2018)

Unsigned articles

Title of the newspaper/magazine. Year of publication. "Title of the article." Date: page range.

New York Times. 2002. "In Texas, Ad Heats Up Race for Governor." July 30, 2002.

(*New York Times* 2002)

Corporate Author

Name of the corporate author [acronym if needed]. Year of publication. *Title of the publication.* Place of publication: Publisher.

International Organization for Standardization ?ISO?. 2019. *Moving from ISO 9001:2008 to ISO 9001:2015.* Geneva: International Organization for Standardization.

(International Organization for Standardization ?ISO? 2019) – *The first in-text citation*

(ISO 2019) – *Second and all subsequent citations*

Legal and Public Documents

Sections, articles, or paragraphs can be cited in the parentheses. They should be appropriately abbreviated.

Constitutions and laws

The title of the legislative act [acronym if needed], "Official Gazette of the state" and the number of the official gazette, or the webpage and the date of last access.

The Constitution of the Republic of Serbia, "Official Gazette of the Republic of Serbia", No. 98/06.

(The Constitution of the Republic of Serbia, Art. 33)

The Law on Foreign Affairs [LFA], “Official Gazette of the Republic of Serbia”, No. 116/2007, 126/2007, and 41/2009.

(LFA 2009, Art. 17)

Succession Act [SA], “Official Gazette of the Republic of Croatia”, No. 48/03, 163/03, 35/05, 127/13, and 33/15 and 14/19.

(SA 2019, Art. 3)

An Act to make provision for and in connection with offences relating to offensive weapons [Offensive Weapons Act], 16th May 2019, www.legislation.gov.uk/ukpga/2019/17/pdfs/ukpga_20190017_en.pdf, last accessed 20 December 2019.

(Offensive Weapons Act 2019)

Legislative acts of the European Union

The title of the legislative act, the number of the official gazette, the publication date, and the number of the page in the same format as on the *EUR-lex* website: <https://eur-lex.europa.eu/homepage.html>.

Regulation (EU) No 182/2011 of the European Parliament and of the Council of 16 February 2011 laying down the rules and general principles concerning mechanisms for control by Member States of the Commission’s exercise of implementing powers, OJ L 55, 28.2.2011, p. 13–18.

(Regulation 182/2011, Art. 3)

Web sources

Surname, Name, or name of the corporate author [acronym]. Year of publication or n.d. – if the year of publication cannot be determined. “The name of the web page.” *The name of the website*. Date of creation, modification, or the last access to the web page, if the date cannot be determined from the source. URL.

Bilefsky, Dan, and Ian Austen. 2019. “Trudeau Re-election Reveals Intensified Divisions in Canada.” *The New York Times*. <https://www.nytimes.com/2019/10/22/world/canada/trudeau-re-elected.html>.

(Bilefsky and Austen 2019)

Institute for Political Studies [IPS]. n.d. “The 5th International Economic Forum on Reform, Transition and Growth.” *Institute for Political Studies*. Last accessed 7 December 2019. <http://www.ips.ac.rs/en/news/the-5th-international-economic-forum-on-reform-transition-and-growth/>.

(Institute for Political Studies [IPS] n.d.) – *First in-text citation*

(IPS n.d.) – *Second and every subsequent citation*

Associated Press [AP]. 2019. “AP to present VoteCast results at AAPOR pooling conference.” May 14, 2019. <https://www.ap.org/press-releases/2019/ap-to-present-votecast-results-at-aapor-polling-conference>.

(AP 2019)

Special cases of referencing

Citing editions other than the first

Surname, Name. Year of publication. *Title*, edition number. Place of publication: Publisher.

Bull, Hedley. 2012. *The Anarchical Society: A Study of Order in World Politics*, 4th edition. New York: Columbia University Press.

(Bull 2012)

Multiple sources of the same author

1) *Multiple sources by the same author* should be arranged chronologically by year of publication in ascending order.

Mearsheimer, John J. 2001. *The Tragedy of Great Power Politics*. New York: W. W. Norton & Company.

Mearsheimer, John J. 2010. “The Gathering Storm: China’s Challenge to US Power in Asia.” *The Chinese Journal of International Politics* 3 (4): 381–396. DOI: 10.1093/cjip/poq016.

2) *Multiple sources by the same author from the same year* should be alphabetized by title, with lowercase letters attached to the year. Those letters should be used in parenthetical citations as well.

Walt, Stephen M. 2018a. *The Hell of Good Intentions: America’s Foreign Policy Elite and the Decline of U.S. Primacy*. New York: Farrar, Straus and Giroux.

(Walt 2018a)

Walt, Stephen M. 2018b. “Rising Powers and the Risk of War: A Realist View of Sino-American Relations.” In *Will China’s Rise be Peaceful: Security, Stability and Legitimacy*, ed. Asle Toje. 13–32. New York: Oxford University Press.

(Walt 2018b)

3) *Single-authored sources precede multiauthored sources beginning with the same surname* or written by the same person.

Pollitt, Christopher. 2001. "Clarifying convergence. Striking similarities and durable differences in public management reform." *Public Management Review* 3 (4): 471–492. DOI: 10.1080/14616670110071847.

Pollitt, Christopher, Johnston Birchall, and Keith Putman. 1998. *Decentralising Public Service Management*. London: Macmillan Press.

4) *Multiauthored sources with the same name and surname* as the first author should continue to be alphabetized by the second author's surname.

Pollitt Christopher, Johnston Birchall, and Keith Putman. 1998. *Decentralising Public Service Management*. London: Macmillan Press.

Pollitt Christopher, Colin Talbot, Janice Caulfield, and Amanda Smullen. 2005. *Agencies: How Governments do Things Through Semi-Autonomous Organizations*. New York: Palgrave Macmillan.

Special cases of parenthetical citation

Exceptions to the rule of placing the parenthetical citation at the end of a sentence

1) If the *author is mentioned in the text*, even if used in a possessive form, the year must follow in parenthesis, and page numbers should be put in the brackets at the end of the sentence.

For the assessment, see Kaltwasser *et al.* (2017) ... (112).

According to Ellwood (2018) ... (7).

2) When *quoting directly*, if the name of the author precedes the quotation, the year and page numbers must follow in parenthesis.

Mearsheimer (2001, 28) claims that: "...".

3) When *using the same source multiple times in one paragraph*, the parenthetical citation should be placed either after the last reference (or at the end of the paragraph, preceding the final period) if the same page (or page range) is cited more than once, or at the first reference, whereas the subsequent citations should only include page numbers.

Do not use *ibid* or *op. cit.* with repeated citations.

Using brief phrases such as “see”, “compare” etc.

Those phrases should be enclosed within the parenthesis.

(see: Ellwood 2018)

Using secondary source

When using a secondary source, the original source should be cited in parenthesis, followed by “quoted/cited in” and the secondary source. The reference list should only include the secondary source.

“Its authority was greatly expanded by the constitutional revision of 1988, and the Court of Arbitration can now be regarded as a ‘genuine constitutional court’” (De Winter and Dumont 2009, 109 cited in: Lijphart 2012, 39–40).

Lijphart, Arend. 2012. *Patterns of Democracy: Government Forms and Performance in Thirty-Six Countries*, 2nd edition. New Haven & London: Yale University Press.

Multiple sources within the same parentheses

1) When *multiple sources* are cited, they should be separated by semicolons.

(Mearsheimer 2001, 34; Ellwood 2018, 7)

2) When *multiple sources by the same author*, but published in different years are cited, the name of the author is cited only the first time. The different years are separated by commas or by semicolons where page numbers are cited.

(Mearsheimer 2001, 2010) or (Mearsheimer 2001, 15–17; 2010, 390)

3) When *different authors share the same surname*, include the first initial in the parenthesis.

(M. Chiti 2004, 40), (E. Chiti 2004, 223)

Chiti, Edoardo. 2004. “Administrative Proceedings Involving European Agencies.” *Law and Contemporary Problems* 68 (1): 219–236.

Chiti, Mario. 2004. “Forms of European Administrative Action.” *Law and Contemporary Problems* 68 (1): 37–57.

TEXT FORMATTING

General guidelines for writing the manuscript

The manuscript should be written in Word, in the following manner:

- Paper size: A4;
- Margins: Normal 2.54 cm;
- Use Times New Roman font (plain letters) to write the text, unless specified otherwise;
- Line spacing: 1.5;
- Footnote line spacing: 1;
- Title font size: 14 pt;
- Subtitles font size: 12 pt;
- Text font size: 12 pt;
- Footnote font size: 10 pt;
- Tables, charts and figures font size: 10 pt;
- Use Paragraph/Special/First line at 1.27 cm;
- Text alignment: Justify;
- Font color: Automatic;
- Page numbering: Arabian numerals in lower right corner;
- Do not break the words manually by inserting hyphens to continue the word in the next line;
- Save the manuscript in the .doc format.

Research article manuscript preparation

The manuscript should be prepared in the following manner:

*Name and surname of the first author**

* Footnote: E-mail address: The institutional e-mail address is strongly recommended. ORCID:

Affiliation

*Name and surname of the second author***

** Footnote: E-mail address: The institutional e-mail address is strongly recommended. ORCID:

Affiliation

TITLE OF THE PAPER***

*** Footnote: if necessary, specify one of the following (or similar) data: 1) the name and number of the project; 2) the proceeding where the manuscript was presented under the same or similar title; 3) statements of gratitude.

Abstract

Abstract, within 100–250 words range, contains the subject, aim, theoretical and methodological approach, results and conclusions of the paper.

Keywords: Below the abstract, five to ten **key words** should be written. Key words should be written in roman font and separated by commas.

The manuscript can have maximally three levels of subtitles. **Subtitles** should not be numbered. They should be used in the following manner:

FIRST LEVEL SUBTITLE

Second level subtitle

Third level subtitle

Tables, charts, and figures should be inserted in the following manner:

- Above the table/chart/figure, center the name of the Table, Chart or Figure, an Arabic numeral, and the title in Times New Roman font;
- Below the table/chart/figure, the source should be cited in the following manner: 1) if the table/chart/figure is taken from another source, write down *Source:* and include the parenthetical citation information of the source; or 2) if the table/chart/figure is not taken from another source, write down *Source: Author.*

Use in-text references according to *Citing and referencing*.

Use the footnotes solely to provide remarks or broader explanations.

REFERENCES

References should be listed after the text of the paper, before the Resume in the following manner:

- the first line of each reference should be left indented, and the remaining lines should be placed as hanging by 1.27 cm using the option Paragraph/Special/Hanging;
- all the references should be listed together, without separating legal acts of archives;
- the references should not be numbered;
- list only the references used in the text.

After the reference list, write the name and surname of the author, the title of the paper and resume in Serbian in the following manner:

Име и презиме првог аутора*

* Фуснота: Имејл-адреса аутора: Препоручује се навођење институционалне имејл-адресе аутора. ORCID:

Установа запослења

Име и презиме другог аутора**

** Фуснота: Имејл-адреса аутора: Препоручује се навођење институционалне имејл-адресе аутора. ORCID:

Установа запослења

НАСЛОВ РАДА***

*** Фуснота: по потреби, навести један од следећих (или сличних) података: 1) назив и број пројекта у оквиру кога је чланак написан; 2) да је рад претходно изложен на научном скупу у виду усменог саопштења под истим или сличним називом 3) исказ захвалности.

Резиме

Resume (Резиме) up to 1/10 length of the paper contains the results and conclusions of the paper which are presented in greater scope than in the abstract.

Keywords (Кључне речи): Keywords should be written in Times New Roman font and separated by commas.

Review preparation

A review should be prepared in the same manner as the research article, but leaving out the abstract, keywords, resume, or book cover.

Book review preparation

When writing book reviews, split the text into **two columns**. Book reviews should be prepared in the following manner:

<i>Name and surname of the author</i>[*] [*] In the footnote: E-mail address: The institutional e-mail address is strongly recommended. ORCID: <i>Affiliation</i> TITLE OF THE BOOK REVIEW^{***} ^{***} Footnote: if necessary, specify one of the following (or similar) data: 1) the name and number of the project; 2) the proceeding where the manuscript was presented under the same or similar title; 3) statements of gratitude.	Below the title place the image of the front cover; Below the image of the front cover list the book details according to the following rule: Name and surname of the author. Year of publication. <i>Title of the book</i>. Place of publication: Publisher, total number of pages. The text of the book review should be prepared following the guidelines of the research article preparation.
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REVIEWERS' GUIDELINES

The role of reviewers is to contribute to maintaining the high quality of our journal. All submitted manuscripts undergo a double-blind peer review, ensuring anonymity in both directions.

Requests for peer review are submitted through the SCIndeks Assistant system. The deadline for accepting or declining the review request is seven days from receipt, while the review itself must be completed within two weeks of receiving the request. The content of the review is confidential and must not be disclosed to individuals outside the journal's Editorial board. If, at any point, a reviewer becomes aware of any conflict of interest related to the manuscript under review, they are required to inform the Editorial board as soon as possible.

When reviewing a manuscript, the reviewer is required to complete the attached review form:

Title of the manuscript:

Relevance, social, and scientific significance of the topic under consideration:

To what extent has the author clearly outlined the theoretical and methodological approach in the manuscript?

Is the manuscript based on contemporary and relevant literature, particularly in terms of the author's use of the latest research published in scientific journals and conference proceedings (especially in political science journals and proceedings)?

Scientific and social contribution of the manuscript. General comments on the quality of the manuscript:

Suggestions for the author on how to improve the quality of the manuscript, if necessary:

Please select one of the recommendations for categorizing the manuscript:

1. Original research article
2. Review article
3. Scientific critique, polemic, or commentary

Please select one of the recommendations regarding the publication of this manuscript:

1. Publish without revision
2. Publish with minor revisions

3. After revision, submit for a new round of review
4. Reject

Additional comments for the editor regarding ethical concerns (e.g., plagiarism, fraud) or other aspects of the article that may assist in making a final decision on its status.

Date of review:

Reviewer's name, surname, and academic title:

The use of chatbots and other artificial intelligence software is strictly prohibited in the preparation of reviews.

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- Београд : Институт за политичке студије, 1994- (Инђија : Комазец). - 23 cm

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