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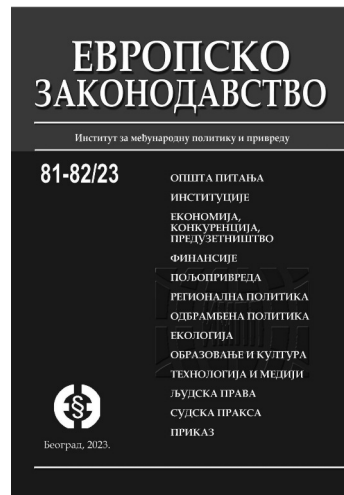
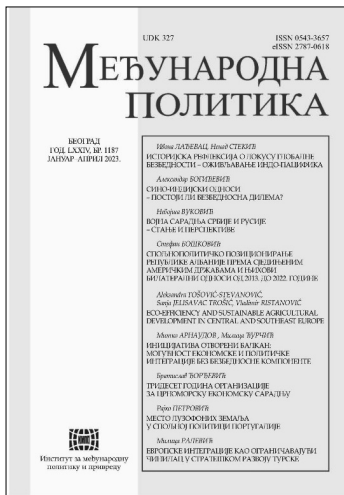
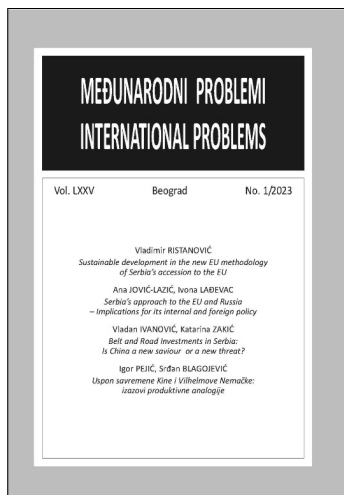
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Nuclear energy sector and cooperation with Russia on the path to energy transition in Serbia

Bogdan STOJANOVIĆ¹

Abstract: The paper explores the scope and limitations of nuclear energy in general and the suitability of a nuclear power plant in the necessary energy transition of the Republic of Serbia. Energy cooperation between Serbia and Russia already exists in the fossil fuel sector, where Russia's strength is unmatched globally. As the largest supplier of gas and oil to European countries, Russia uses the power of its resources for foreign policy purposes, so even the current war in Ukraine has not stopped the gas supply to the European Union. The author analyzes the potency of ROSATOM as the world's largest exporter of nuclear technology and the possibilities for Serbia to use the strategic partnership with Russia for the arrangement of the construction of a nuclear power plant. The work is based on a realistic theoretical setting of international relations. The main hypothesis is that, on the path of the energy transition, Serbia must gradually reduce its dependence on coal-fired thermal power plants, which are inefficient and enormous environmental polluters. The best solution is the construction of a nuclear power plant based on Russian technology. Serbia has already taken steps to improve cooperation with Russia in the nuclear field through several signed agreements from 2018 to 2022. This serves as a solid starting point for the repeal of the law forbidding the construction of nuclear power plants and entering into an arrangement for the construction of such a plant on the territory of the Republic of Serbia.

Keywords: nuclear energy, nuclear power plant, Serbia, Russia, energy, energy transition, energy security, energy diplomacy, ROSATOM.

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Introductory considerations

Energy has enabled the creation and development of humanity. It can be said that it is synonymous with life, considering that all matter and energy are interchangeable categories. However, when we talk about energy today, we mostly think of external sources outside of ourselves, such as traction power, steam engine power, internal combustion engines, solar power, electricity, etc. Man has figured out how to convert one type of energy into another and use it to his advantage. In the modern world, the hunger for energy is becoming greater because it is necessary for starting cars and airplanes, preparing food, industrial production, lighting, and heating rooms. Numerous wars have been fought over the control of energy resources, and the relationship between energy and politics is very complex. Since the production, access, and distribution of energy sources are first-rate geopolitical issues, the concept of energy security is increasingly discussed.

From the mid-18th century, coal became the main energy resource that, combined with the steam engine, enabled mass industrial production and the storage of surplus products. When we talk about the dominant energy resources, we can roughly say that the 19th century was the century of coal, the 20th century was the century of oil, and that the 21st century opened new fields of energy creation (nuclear fusion energy), although the dominance of the triad of fossil energy sources continues (coal, oil, and gas). The principle of nuclear fusion can potentially provide almost unlimited and cheap energy to humanity, but we will have to wait for some time for its commercial profitability (Vujić, Stojanović and Madžgalj 2015). There is ever more discussion about an energy mix that includes non-renewable and renewable (solar, wind energy, geothermal, hydro energy, and biomass) energy sources. Regardless of the aggressive propaganda and lobbying activities of political-economic interest groups for renewable energy sources, the fact is that less than 12% of global primary energy comes from these sources (Ritchie and Roser 2022a). As much as 84% of global energy comes from fossil fuels, while nuclear energy occupies 4.3% of that mix (Ritchie and Roser, 2022a). In the energy of transport, oil derivatives dominate, while in electricity production, the situation is somewhat different. In the production of electricity, coal occupies 36.7%, gas 23.5%, hydro energy 15.8%, and nuclear energy 10.4% of the total share (Ritchie and Roser 2022b). Wind energy provides only 5.3%, and solar panels produce even less, i.e., about 2.7% of the world's electricity (Ritchie and Roser 2022b).

Serbia is fully dependent on coal for energy. About 70% of the total electricity is produced by the thermal power plants of Elektroprivreda Srbije, and the remaining 30% is produced by 16 hydropower plants (EPS 2022). The Oil Industry of Serbia (NIS) is the only company in the Republic of Serbia engaged in the

exploration and production of oil and gas, and it is majority owned by the Russian Gazprom (Gazprom). According to official data from the energy balance of the Republic of Serbia, domestic oil production covers only 20% of its needs, while 80% comes from imports (MRERS 2022). Only 10% of the required amount of gas is covered by domestic production, while 90% is imported (MRERS 2022). Serbia is completely dependent on Russian gas. Before the main gas pipeline “Balkan Stream,” which transports gas via Turkey and Bulgaria, was put into operation in 2021, it was transported via Hungary (MRERS 2022). The above data speak of Serbia’s general energy dependence on imports and the huge dependence on coal in electricity production. Apart from the strategic limitation, the additional problem of the outdated thermal power plants is the enormous pollution of the environment and the inhalation of almost the most unhealthy air in Europe according to the relevant scientific and expert data. As many as 10,000 people died in 2010, primarily due to inhalation of harmful particles and exposure to ozone. That is the second highest death rate due to air pollution in Europe (HEAL 2014). In the relatively near future, Serbia must enter the process of energy transition towards new energy sources, and renewable sources seem to be extremely expensive and insufficient. The most viable option, which would meet most needs and further the “green” aim of lowering environmental pollution, is an arrangement for the installation of a nuclear power station. From this perspective, it is critical to examine the potential for collaboration with Russia, Serbia’s strategic energy partner and the world’s top supplier of nuclear reactors at the moment.

Scope and limitations of nuclear energy sector

The use value of nuclear energy, apart from the practice of deterrence, has been seen in the production of electricity, medicine, agriculture and the transport drive of large vessels, icebreakers and even missiles (Стојановић 2013). Relevant analyses identify as many as 34 nuclear weapons development programs, of which only ten countries have developed nuclear weapons (Стојановић 2021). The most developed countries in the world started to develop civilian nuclear reactors, and the technology, whose evolution is still not final, has constantly advanced. Nuclear power plants indeed carry with them a certain risk, but so is any type of human activity. Are thermal power plants, the petrochemical industry, pharmacology, or biotechnology less dangerous to mankind today than nuclear power plants? They are not. Man is an ontologically unsafe being because, in addition to technological dangers, there is a constant possibility of extermination by a celestial body, a volcano, a super-tsunami or a virus. A cost-benefit analysis needs to be done for

every technological breakthrough. Empirical evidence suggests that even nuclear weapons, capable of ending human existence, can play a positive role if the right purpose is found for them. During the Cold War, Armageddon weapons contributed to stability and most likely prevented the outbreak of the much more devastating Third World War (Петровић и Стојановић 2012; Novičić 2005). The elimination of nuclear weapons can definitely have a humanitarian element due to the cataclysmic effect of potential use. At the same time, the need to dismantle nuclear power plants cannot have either a security or humane argument, which is stated by advocates of environmental movements and the so-called “green” lobby. In the US, in the decades-long nuclear history, there was only one incident at a nuclear power plant at Three Mile Island in 1979. On that occasion, no one died from radiation, but the US tightened the regulation and control of the operation of nuclear power plants (Lewis 1981). On the other hand, thousands of people die annually from harmful emissions from thermal power plants, such as sulfur dioxide and mercury. Relevant data on deaths caused by different methods of electricity production show that the death rate per trillion kilowatt hours of energy produced from coal is 100,000; oil 36,000; gas 4,000; hydro sources 1,400; solar 440; wind 150; while nuclear energy causes the death of “only” 90 people, which is by far the lowest of all types of production (Conca 2012). In its report, the World Health Organization identified biomass burning in developing countries as the biggest global health problem, with as many as 3.2 million directly caused deaths in 2020 (WHO 2022). A patient in a clinic who goes for a PET scanner in one day will receive a dose of radiation several times higher than what is allowed to workers in nuclear power plants annually (Clifford 2022a).

Because of its strong economic growth, China is continuously constructing nuclear power facilities to lessen its reliance on coal. China intends to build up to 150 nuclear reactors worth \$440 billion over the next 15 years (Murtaugh and Chia 2021). Many developed countries or those aiming towards that goal are opening new nuclear power plants. These are Russia, India, France, Poland, South Korea, and Japan, which continued to build nuclear facilities after Fukushima. Today, about 40 countries in the world have at least one nuclear reactor. Thermal power plants enormously pollute the air with the emission of mercury and heavy metals, and countries are opting for a “cleaner” form of energy production. Global resistance to nuclear power is relatively weak, although media promotion sometimes gives the impression of its great strength. It has become an issue of which political lances break and where the “green lobby” has an influence on decision-making, particularly in Germany and Italy among European nations. Russia does not have that issue, and in addition to employing nuclear energy “at home,” it leads in the export of nuclear technology at the global level (Economist 2018).

The working life of nuclear power plants is at most 20 years longer than the life of thermal power plants. As for the so-called alternative energy sources like solar energy or energy obtained from windmills that use wind power, the data show that their share is minor, even in the most developed countries in the world. Solar panels and windmills are very expensive, even for the wealthiest countries, such as Germany, where electricity prices have risen enormously after the decision to shut down nuclear power plants. The biggest problem with alternative energy sources is they are not real alternatives but idealistic options incapable of satisfying the global hunger for energy. Taking into account the initial investment, day-to-day operating costs and long-term investment, electricity from wind energy costs on average \$90 per megawatt-hour, from solar cells \$88.7, from coal-fired power plants \$41, from hydroelectric plants \$38, from gas plants 36 dollars, while the price of electricity produced from a nuclear power plant is “only” 33 dollars per megawatt-hour (Antonini 2022). According to the Institute for Nuclear Energy, a wind farm that generates electricity equivalent to one 1000-megawatt nuclear reactor requires more than 140,000 hectares of land (Antonini 2022). A nuclear power plant on an area of 103 hectares generates a million megawatt-hours, while the same amount of energy requires 3,200 hectares of solar panels or 17,800 hectares of full windmills (Antonini 2022). The fourth and fifth generations of nuclear reactors will certainly reduce the risks of disaster to the lowest possible extent, and nuclear technology is advancing daily, extending the “lifetime” of reactors and reducing the amount of initial investment. Nuclear waste from these reactors will be far less than in previous generations. Simply put, countries that refuse to build nuclear power plants will very quickly find themselves in the unenviable position of having to rely on fossil fuels (coal and oil), and due to their scarcity (their quantity will be permanently reduced), they will be in a position to import electricity.

In addition, nuclear technology shows the most room for improvement and progress. In this sense, it is necessary to mention potential fusion and thorium reactors. The principle of nuclear physics could definitely reconcile “hard” environmentalists with nuclear energy production. The most objective argument that is not in favor of nuclear energy today concerns nuclear waste, which, although small in quantity, can be problematic for the environment. If fusion reactors became economically viable (currently, they are not), nuclear energy production would not leave behind long-lived radioactive waste. In addition, fusion would reduce the cost of energy production given the cheap and sustainable energy sources (deuterium and tritium) (Vujić, Stojanović and Madžgalj 2015). Much progress has already been made in the direction of the commercialization of nuclear physics. The enormous ITER project (International Thermonuclear

Experimental Reactor) is well known as one of the most expensive scientific endeavors in history, which will cost 15 billion dollars in the first phase (Henley 2011). The ITER aims to commercialize nuclear fusion, and the EU, the US, China, India, Japan, South Korea, and Russia are participating in the construction of the reactor in the south of France (ITER 2022). The project was launched in 2006, and a fusion reactor is expected to be commissioned in 2025, with full commercial use in 2035 (ITER 2022). In the next few decades, the big challenge will be to collect the helium-3 isotope from the moon, where it is found in huge quantities. This element is potentially an almost inexhaustible source of clean energy based on the principle of nuclear fusion (Güven and Kuchdal 2012). The most powerful countries in the world, primarily Russia and the US, are trying to renew their presence on the moon by the end of this decade, so even the helium-3 collection facility will no longer be in the realm of science fiction (Stojanović 2020, 671).

Another technological breakthrough in the field of nuclear energy could be the use of thorium as nuclear fuel. Thorium is less radioactive and produces less nuclear waste than uranium. Its isotope thorium-232 can be converted into uranium-233, and besides being more widespread in nature than uranium, thorium provides safer handling and leaves far less nuclear waste (Петровић 2010). Thorium is easier to obtain because it comes from surface mines, whereas uranium comes from deep mines.

The conclusion is that nuclear energy is overall the most profitable, although no less safe than other types, due to the mentioned ontological insecurity of man. With a 70% share of nuclear power plants in energy production, France is the leading European country and the only energy independent from fossil fuels (WNA 2022a). It always has a surplus of electricity, and today, it is the largest exporter of electricity in the world (WNA 2022a). In some countries, there is a pronounced strength of the "green lobby", which has an interest in preventing the construction of nuclear plants under the pretext of environmental protection, all to make enormous profits from the distribution of overpriced windmills, turbines, and solar panels. Even the Middle Eastern countries are saving their oil and investing in nuclear power plants to ensure long-term energy independence. Many will say that it is unprofitable for them, considering that in the OPEC countries (Organization of the Petroleum Exporting Countries), a liter of bottled water is more expensive than a liter of oil. However, strategists in those countries made a good long-term decision to diversify energy sources. The development of alternative forms of energy propagated by the "green lobby" is certainly good and desirable but, at the moment, it is too expensive, inefficient (there is no consistency of production and the possibility of energy storage is weak), and insufficient for growing energy needs.

From this, we can conclude that Serbia, as a poor country, cannot afford the luxury of investing too much in unprofitable alternative energy sources. It seems that Serbia's best strategic decision on the path to the energy transition could be reflected in the arrangement for nuclear plant construction. The cost of building a nuclear reactor is not small, but with the scientific and professional help of a world nuclear giant like Russia, one could talk about a realistic project that would make Serbia a more energy-stable country. The arrangement could include one of the neighboring countries, such as Hungary or Bulgaria, given the high cost of the initial investment.

Russian energy policy as an instrument of foreign policy

The power of gas as a political weapon can be seen in times of crisis, such as the current war in Ukraine. Europe's dependence on Russian energy sources is so great that, according to official Eurostat data, the EU imports 24.8% of oil and 39.2% of gas from Russia (Eurostat 2022a). A deeper analysis of the connection between political power and energy is a separate topic for consideration. Energy products are highly politicized commodities which means their influence extends far beyond the energy sector. Long-term foreign policy definitions and political processes are influenced by the geographical distribution of energy sources and the directions of providing oil and gas pipelines (Proroković 2020).

Energy is a first-rate issue of national security. Oil became a faithful companion in geopolitical disputes during the transition from the 19th to the 20th century, and similarly, gas became a geopolitical factor in the transition from the 20th to the 21st century (Simurdić 2019, 13). Therefore, the science of international relations is increasingly discussing the terms "energy security" and "energy diplomacy". The American conceptualization of energy security is based on two basic elements. First, to ensure the absence of any kind of threat to energy sources and resources. Second, the necessity of finding and conquering new sites for the purpose of energy independence (Lečić 2019, 54). The Russian energy strategy defines energy security as resource sufficiency, economic availability, and ecological-technological possibility (exploitation, production, and processing of energy resources) (Lečić 2019, 54). Andreas Goldthau defines energy security as "reliable supply at acceptable prices in the case of the buyer, and reliable demand at sustainable prices on the exporter's side" (Goldthau 2010, 26). According to the same author, energy diplomacy is defined as "the use of foreign policy to ensure secure access to energy supplies abroad and to promote (mainly bilateral) cooperation in the energy sector" (Goldthau 2010, 28). Accepting the

forementioned definition of energy security, we can conclude that Russia is an energy-secure country, given the guaranteed demand for its export goods on which the entire economy rests. The term “energy diplomacy” has to be updated to encompass the situation in which a state uses its energy resources to pursue foreign policy objectives. As a result, energy diplomacy encompasses both the use of foreign policy to promote a steady energy supply and vice versa. Russia has a highly developed mechanism of energy diplomacy, not to ensure its supply, given that it is energy self-sufficient, but to achieve political goals through the levers of dependence of other countries on Russian energy sources. Therefore, the most adequate definition of energy diplomacy seems to be the one by Daniel Yergin, with a small addition. According to Yergin, energy diplomacy is “the skill of adequately managing energy dependence (its own but also that of others, ed.) and avoiding vulnerability to supply asymmetries” (Simurdić 2019, 24). The relationship between the EU’s dependence on Russian energy sources best speaks of the power of Russian energy diplomacy. Regardless of the introduction of sanctions against Russia by all EU countries, they are generally not ready to give up the supply of Russian gas, which continues to flow unhindered. Russia can condition the payment of gas in rubles, and countries that do not comply with the request may become energy-endangered, which brings with it political repercussions.

Various instruments of energy diplomacy are available, such as dictating the price of energy, interruptions in supply, control over assets in the energy sector of other countries, and the policy of oil and gas pipeline routes. Considering nuclear energy, a small number of countries control the export of technology and fuel for nuclear reactors. Russia is the world leader with 60% of world exports of nuclear technology (Zoe 2022). The Russian State Atomic Energy Corporation (hereinafter: ROSATOM) controls as much as 36% of the world’s uranium enrichment market and supplies nuclear fuel to 78 nuclear reactors in 15 countries (Zoe 2022). Interruptions in the supply of nuclear fuel can cause energy instability. During the 2014 Ukrainian crisis, then-Deputy Prime Minister Dmitry Rogozin imposed a ban on supplying nuclear fuel to Ukraine (Zoe 2022). The new war in Ukraine since March 2022 has led Ukraine to sign a contract with the American Westinghouse Electric Corporation on fuel supply for all four nuclear power plants (Reuters 2022). Ukraine gets as much as 55% of its electricity from nuclear power plants, so cutting off the supply would completely collapse the country’s energy system (Fleck 2022). In the EU, 24.6% of electricity is produced by nuclear power plants (Eurostat 2022b). There are numerous examples of geopolitical decisions to reduce dependence on Russian nuclear components. For instance, Lithuania shut down its nuclear reactor, which produced 70% of the country’s total electricity (WNA 2022b). Although the main export product of this Baltic state was the electricity

produced in the nuclear power plant, it was forced to close it under pressure from the Western allies. The main reason for the irrational shutdown of the nuclear power plant was to reduce political dependence on Russia, where the fuel for the reactor was supplied. Finland, in addition to expressing its desire to join NATO (North Atlantic Treaty Organization), after the launch of the Russian special military operation in Ukraine canceled the contract for the construction of a nuclear power plant with ROSATOM worth 7.5 billion euros (Pohjanpalo 2022). The argument of the Finnish political leadership was reflected in the avoidance of Russian nuclear technology and nuclear fuel supply. The nuclear energy sector in Europe, regardless of all attempts to break away from Russian influence, is highly dependent on imports of Russian technology and uranium. In 2020, 20.1% of total uranium imports into the EU were from Russia and 19.1% from Kazakhstan, Russia's ally (Appun 2022). Dependence on Russian nuclear technology is highest in Eastern Europe, where as many as 18 nuclear reactors are calibrated to consume nuclear fuel purchased from ROSATOM (Appun 2022). In Germany, the remaining three reactors in operation also run on Russian uranium (Appun 2022).

How high the stakes are in nuclear energy is best shown by the fact that European countries dependent on Russian gas timidly discussed diversification and a possible alternative to Russian gas supply. At the same time, there was no mention of possible sanctions on the import of Russian nuclear fuel and nuclear technology (Clifford 2022b). The war in Ukraine instantly launched the story of Europe's gas dependence on Russia. The focus was on the debate on the import of liquefied gas from the US and increasing imports from Algeria, while nuclear energy was not mentioned at all, even though most European nuclear power plants are dependent on Russian fuel. The opening of another painful topic within the EU would lead to complete destabilization, given that the energy segment of the EU is the most vulnerable. The "most terrifying Russian weapon" is not just gas, whose supply was unabated by the Iron Curtain of the Cold War, but also nuclear fuel, whose delivery to European power plants will not be stopped by crises or even wars. Once again, Russia has demonstrated its strength to take energy power to the geopolitical level, which confirms the hypothesis of the inseparability of energy and foreign policy.

Serbia's energy problems and the necessity of energy transition

Serbia is an energy-poor country. Oil and gas reserves make up less than 1% of the total balance of reserves, and the remaining 99% are coal reserves dominated

by low-quality and low-caloric lignite (Стратерија 2015). As mentioned, Serbia is energy dependent on coal that is burned in outdated thermal power plants. Serbia does not have an adopted foreign policy strategy, but the statements of officials and the harmonization of legal acts during the accession negotiations speak in favor of Serbia's declarative goal of becoming an EU member. On the other hand, Serbia is completely dependent on the import of gas and oil from Russia, with which it signed the Declaration on Strategic Partnership in 2013 (RTS 2013). In 2005, Serbia signed the Agreement on the Formation of the Energy Community of Southeast European Countries in Athens, which created a unique, stable, and regulatory framework for cross-border energy trade together with the EU (Закон о ратификацији 2006). Serbia effectively took over all EU legal *acquis* by signing this framework and became obligated to align its legislation and behavior with EU requirements. Serbia has adopted the Law on Energy, which enables the full application of EU energy regulations and the so-called Third Energy Package (Закон о енергетици 2021). The obligations provided for the separation of production and supply of energy from transport, providing access to the energy network to an interested third party, as well as the separation of activities in companies engaged in the production, supply, and transport of electricity and gas (Закон о енергетици 2021).

In practice, there is constant political pressure from Brussels on how Serbia implements its energy policy. By putting into operation the "Balkan Stream" in January 2021, which delivers Russian gas via Turkey and Bulgaria and along a 403-kilometers route through Serbia, the EU pointed out that Serbia is violating its commitments and the Third Energy Package. The Energy Community previously demanded Serbia to cancel the exemption of third-party access to the "Turkish Stream" gas pipeline and to provide access to other market entities (Dokleštic 2019). The report states that "Balkan Stream" will only further strengthen Gazprom's dominance in Serbia (Dokleštic 2019). The transit of Russian gas to Europe is perceived in the West as a geopolitical penetration of Russian "malignant" influence. The US and the EU appear as protectors of interests and all-knowing interpreters of the national interests of European countries, where they see the fight against Russian energy occupation as a primary goal. Regardless of the strong anti-Russian efforts from the West, where Serbia is not an exception but probably the object of stronger pressures due to historical ties with Russia, Europe has no realistic alternative for Russian energy producers. The pressures of the EU on Serbia's energy policy can be classified into three main categories. First, the aforementioned requirements related to competitiveness, which give energy buyers a choice of several different market offers (liberalization). Second, the diversification of energy sources, given that Serbia is exclusively dependent on

fossil fuels. Third, environmental protection and the reduction of carbon dioxide emissions into the atmosphere. The Paris Agreement is a reflection of the world consensus because it was signed by almost all the countries in the world, including Serbia (The Paris Agreement 2015). With this, it committed itself to contributing to the reduction of greenhouse gas emissions, which in the energy sector would mean shutting down coal-fired thermal power plants in the near future. All three categories of changes in the Serbian energy sector determine the concept popularly called “energy transition”.

In the Energy Sector Development Strategy of the Republic of Serbia until 2025, with projections until 2030, the following goals are highlighted as key priorities: ensuring energy security; development of the energy market; and overall transition to sustainable energy (Стратегија 2015). The EU, whose policies Serbia complies with as part of the reduction of pollution emissions, foresees a change in the structure of the energy cycle and infrastructure. A special problem for Serbia is the large coal-burning plants, which, according to all relevant scientific studies, pose a danger to the environment and human health. According to the Greenpeace report, the “Nikola Tesla” thermal power plants are in the 9th place among the world’s largest polluters of sulfur dioxide, and Serbia as a whole occupies an unenviable 18th position on the list of the largest global polluters of this gas (Dahiya et al. 2020). The obsolescence of coal-burning technology and the lack of devices for flue gas desulfurization additionally alarm Serbia on the way to its energy transition. In the aforementioned Strategy, one of the main requirements for the future is the production and consumption of energy with as few negative consequences as possible for the environment, water, air, soil, and consequently the food chain, biodiversity, and human health (Стратегија 2015). In February 2022, the European Commission included gas and nuclear energy as “green” energy sources whose usage has the task of accelerating the shutdown of liquid and solid fossil fuel plants, primarily coal-fired thermal power plants (European Commission 2022). Serbia inherited the legal ban on the construction of nuclear facilities in accordance with the Memorandum of the Socialist Federal Republic of Yugoslavia (SFRY) from 1989 and confirmed the ban by adopting the Law on the Prohibition of the Construction of Nuclear Power Plants (Закон о забрани 2005). The existing legal framework prohibits any nuclear facility and is valid indefinitely, i.e., until the Parliament of the Republic of Serbia adopts a new regulation that would invalidate the law. The problem of the lack of a legal framework for the future nuclear power plant in Serbia is more of a technical nature, and what represents a bigger problem is the lack of scientific and professional staff that would monitor the construction and operation of such a demanding plant. The training of personnel for the needs of nuclear energy has long been discontinued, but the

relic of the former Yugoslav nuclear program exists in terms of certain experience and infrastructure. The Energy Sector Development Strategy does not exclude the possibility of building a nuclear power plant. However, it is estimated that it would take 10 to 15 years from the moment of the repeal of the Law on the Prohibition of the Construction of Nuclear Power Plants to the moment of overcoming the listed problems and starting the operation of the nuclear power plant in Serbia (Стратерија 2015).

Back in the seventies of the 20th century, Yugoslavia had very ambitious plans for the construction of nuclear power plants throughout the country. In 1982, the plans were formalized through a strategic document entitled "Basic Agreement on a Long-Term Plan for the Development and Application of Nuclear Energy in Yugoslavia Until 2000" (Dogovor o osnovama 1982). The first nuclear power plant out of four planned was put into operation in 1981 on the left bank of the Sava river near the town of Krško in Slovenia. In 1985, the Business Community for Research, Development, and Peacetime Use of Nuclear Energy proposed a plan for Yugoslavia to independently master nuclear fuel cycle technology (Perović-Nešković 2000, 63). Nuclear ambitions have been curbed by a combination of factors: political instability, separatist drives, and a strong anti-nuclear campaign caused by the 1986 Chernobyl nuclear disaster. The final shutdown of the nuclear program in Yugoslavia followed in 1989, but the "Krško" nuclear power plant, based on American technology, still produces electricity for Slovenia and Croatia. If Serbia were to lift the legal ban today and make a political decision to build a nuclear power plant, it would take 10 to 15 years to put it into operation. When the opponents of the nuclear power plant argue their positions, they often cite Serbia's personnel and technological incapacity for such an undertaking, but at the same time, they forget that the largest number of nuclear power plants in the world were started with the external assistance of a country exporting technology and expertise. There is certainly a sensitivity regarding the fact that the energy system depends on raw materials and "know-how" from outside, but the situation today is not much different when it comes to oil and gas. In this sense, such a decision is not only energy-related but also political. Therefore, Russia is emerging as the most favorable partner for the future nuclear power plant. We analyzed the existing dependence of Serbia, but also of the whole of Europe, on Russian gas and oil to a lesser extent. Serbia and Russia already have a strategic partnership, strong cultural and historical ties, and a political alliance unlikely to be shaken by anti-Russian sentiments among the part of Serbian political elite. Russia is the world leader in the export of nuclear technology and has vast experience in the installation of reactors in all parts of the planet, which guarantees the success of the eventual nuclear arrangement and the energy transition of Serbia.

Untouchable energy titan – ROSATOM

Russia is the world leader in nuclear technology export quantity as well as quality, as it leads in advanced innovations in nuclear transport and reactor design. The ambition to launch the world's first "fourth generation" nuclear reactor is not only at the level of an idea, but is effectively developing the fast neutron reactor BN-1200, with the goal of operational commissioning by 2025 (Sitaras 2018, 4). Also, Russia has the world's only fleet of nuclear-powered icebreakers (Manaranche 2020). A special technological breakthrough of Russia is the first floating nuclear power plant, "Akademik Lomonosov", put into operation in 2020 (ROSATOM 2019a). "Atomstroyexport" is the body responsible for the negotiation, design, and implementation of cross-border nuclear projects, and as such, today it is part of the nuclear empire of the Russian ROSATOM, founded in 2007 by the decision of President Vladimir Putin (Reuters 2007). The first successful project to export a nuclear reactor outside the territory of the former Warsaw Pact was in 1999, when the contract with China for the Tianwan 1 nuclear power plant was realized (Sitaras 2018, 15).

A new era in the export of Russian nuclear technology began in 2007 with a structural reorganization and the establishment of an "empire" called ROSATOM. According to official data from the internet presentation of this giant, ROSATOM has activities in 50 countries in the world. Its activities relate to the construction of nuclear power plants; mining and enrichment of uranium; manufacturing and supply of nuclear fuel; and innovations such as hydrogen energy, nuclear medicine, and new ways of energy storage (ROSATOM 2022). There are 350 companies and organizations under ROSATOM, with a total of 290,000 employees (ROSATOM 2022). ROSATOM insists that it is one of the world's largest contributors to the reduction of the greenhouse effect and that nuclear power plants are the "green" way to produce electricity with the lowest level of spread of harmful substances compared to all other energy production models (ROSATOM 2022). The headquarters of the company is in Moscow, and among the numerous "daughter" companies, the most important are: "Rosenergoatom", which manages all nuclear power plants on the territory of Russia; "Atomenergoproekt", as the main engineering company in charge of designing nuclear power plants; "OKB Gidropress", the main design bureau for reactors; and the aforementioned "Atomstroyexport", with the task of exporting nuclear technology. The quality of Russian nuclear technology is reflected in the variety of client countries, the most interesting of which is the Akkuyu nuclear power plant project in Turkey. The NATO member and American ally for many decades ordered four Russian nuclear reactors with a total power of 4,800 megawatts from ROSATOM, and the first reactor will

start operating in October 2023, exactly on the centennial of the founding of the modern Turkish Republic (ROSATOM 2018). The nuclear power plant, together with the launch of the “Turkish Stream” gas pipeline, creates an unbreakable geopolitical link between Russia and Turkey, regardless of Turkey’s formal membership in NATO and different geopolitical interests in Syria. The power of energy diplomacy can be greater than all other strategic calculations and practically untouchable even in times of crisis, such as the one in Russian-Turkish relations after the downing of a Russian fighter jet in 2015 (BBC 2015). The latest war in Ukraine is no exception. Although there is a flight ban for Russian planes in all EU countries, Russian transport planes have already landed in the Czech Republic and Slovakia without problems on several occasions. The reason for the exception was the precious cargo that the “Ilyushins” were carrying, which was nuclear fuel produced by TVEL, a subsidiary of ROSATOM, for the needs of Czech and Slovak nuclear power plants (Chastand 2022). These power plants are based on Russian technology, and the Slovak Minister of Economy, Richard Sulik, clarified the exception by arguing that all nuclear reactors in Slovakia are of Soviet design, which produce more than 50% of the total electricity for a small landlocked Central European country (Chastand 2022). The relationship between sanctions, on the one hand, and trampling on one’s own words, on the other hand, seems like hypocrisy with the conclusion that energy needs break down most of the geopolitical barriers. The Slovak Minister’s argument is a reality experienced by almost all European countries in relation to energy dependence on Russia.

The decision of all EU member states from May 2022 to reduce dependence on Russian gas by two-thirds by the end of the year, with the complete abandonment of Russian fossil fuels by the end of 2027, was not accompanied by a strategic decision to abandon the import of Russian nuclear fuel (Wesolowski 2022). Despite the strong initiatives of the Ukrainian side to put ROSATOM on the “black list” in Brussels, this did not happen. Hungary continues its cooperation with ROSATOM in the construction of two new blocks of the Paks nuclear power plant, and the German Siemens sends a message that it continues all agreed-upon deals with the Russian energy giant (Wesolowski 2022). The French nuclear conglomerate Framatome also refused to cut off communication with ROSATOM and continued strategic cooperation in the field of nuclear fuel production and the development of new technologies (Wesolowski 2022). While thousands of Western companies suspend arrangements with Russian institutions and companies, ROSATOM continues its activities unhindered. Despite the conflict in Ukraine, even the US did not forbid the import of nuclear fuel, 16% of which originates from Russia (Lorenzini and Giovannini 2022).

State-of-the-art Russian reactors are guaranteed to operate for 60 years without any technical overhaul, making nuclear cooperation agreements long-term ties between Russia and the country ordering the technology. ROSATOM, next to Gazprom, is the second striking fist of Russian energy and geopolitical influence. ROSATOM has a wider global reach considering that it operates on the entire planet, while Gazprom is limited by not-so-long gas pipelines (a maximum of 4,500 km from the territory of Russia). Gazprom's clients are mostly European countries, except for the "Power of Siberia" gas pipeline that goes to China. In this sense, ROSATOM has greater geopolitical potential considering that it has contracts with the BRICS countries and developing countries with great economic and political potential, while Gazprom is linked to countries that have reached their zenith in economic terms. It seems that ROSATOM has escaped the skillful scientific and professional analyses of Western experts who talk about Russian political influence through energy, primarily discussing Gazprom's activities. Through ROSATOM's global projects, Russia undoubtedly achieves a permanent political presence and diplomatic influence on countries in the most geopolitically important regions of the world, such as the Middle East and Southeast Asia.

We will summarize the strength of ROSATOM in several basic conclusions, which are of great importance in the potential relationship with Serbia. First, ROSATOM is the world leader in nuclear technology, with more than a third of global uranium enrichment production, the most sophisticated innovations, and full political support of the state. In contrast to Western nuclear exporters, ROSATOM enjoys full diplomatic support and state logistics (more than 15 nuclear attachés in embassies worldwide) (Sitaras 2018, 24). Second, ROSATOM is the only company in the world that offers a "build-own-operate" nuclear power plant service package where the contracting state does not have to spend a single dollar on the investment (this model is applied in Turkey). The contracts include a whole package of services, from fuel supply, training of workers, and the return of radioactive waste to Russia (Sitaras 2018, 24). Third, ROSATOM has a global reach far greater than Gazprom's, which is limited by pipeline infrastructure. This fact enables investments in countries with huge economic potential, not only a constant supply of already saturated markets. Finally, the security of the nuclear fuel supply does not depend on transit through the territory of other countries, and it is guaranteed regardless of crises and wars, which is best evidenced by the current war in Ukraine. Nuclear cooperation, even in a civilian program, is a very sensitive field of international politics and is capable of creating unbreakable bilateral ties between states. Undoubtedly, nuclear energy is a strategic level of cooperation, almost on par with contracts for the supply of the most modern military weapons.

In this sense, Serbia should consider ROSATOM as the most attractive partner in the country's necessary energy transition.

The Serbian-Russian connection and the future of nuclear energy in Serbia

Serbia and Russia have developed energy cooperation, the beginnings of which can be traced back to the Soviet-Yugoslav era of relations. Russian Gazprom is the majority owner of the Serbian Oil Industry according to the energy agreement from 2008, which was preceded by an agreement aimed at reducing Serbia's trade deficit in trade with Russia (Петровић и Јокић 2015, 100-106). Serbia's dependence on Russian gas and oil is huge. However, when we talk about potential cooperation in the field of nuclear energy, it is necessary to keep in mind the continuity of nuclear cooperation from the first Yugoslav-Soviet relations to the latest agreements between Serbia and Russia.

Yugoslavia was a pioneer in nuclear research, with one of the first nuclear programs. In fundamental and applied research, the Vinča Institute for Nuclear Sciences collaborated with many experts and countries worldwide. The crown of international cooperation was achieved with the Soviet Union, which built a research heavy-water reactor in Vinča, put into operation by Josip Broz in December 1959 (Nakićenović 1961, 53). The Soviet reactor in Belgrade was one of the most modern in the world at that time. Yugoslavia's ambitions for independence in nuclear research were so great that the Yugoslav leadership developed the nuclear fuel cycle, from the mining of uranium ore, through the processing process, to enrichment. Great ideas failed and the only relic of the Yugoslav nuclear program, apart from the Institute in Vinča, is the mentioned nuclear power plant "Krško".

Today, Serbia relies on coal in the production of electricity, and the issue of energy transition gained momentum after the problems of the Electric Industry of Serbia's system in 2021. The generally poor quality of coal, combined with the absence of homogenization (equalization of the quality of the mined raw material) and unprofessional management, led the entire system of power generation in thermal power plants in Serbia to the verge of a complete collapse. The shortage of electricity is replaced by imports at exorbitant prices, which are all reasons for the necessity of accelerating the process of energy transition towards a new way of energy production, of which the nuclear power plant is the most optimal solution. In November 2021, the President of the Republic of Serbia, Aleksandar Vučić, disclosed

talks with Hungarian leader Viktor Orbán about a joint investment in a nuclear power plant (Blic 2021). Vučić said very clearly: “We said that we would desire to be co-owners of 15% of their nuclear plant” (Blic 2021). On the same occasion, he added that he had previously had discussions on the same topic with the then Bulgarian Prime Minister Boyko Borissov (Blic 2021). Joint investment in a nuclear power plant with a neighboring country such as Hungary, Romania, or Bulgaria eases the financial pressure on the initial investment but additionally complicates political relations, given that the mentioned countries are EU members. In addition, Hungary and Bulgaria rely on Russian nuclear technology, while the Romanians, despite long-term cooperation with the Soviet Union, chose Canadian nuclear reactor technology. This means that, regardless of the division of costs between the two Balkan states, the help of a third state would be necessary for such an undertaking. A few days later, Aleksandar Vučić explicitly stated in an interview for the “Soloviev Live” channel that Serbia was considering the construction of a nuclear power plant in Serbia with ROSATOM (Tanjug 2021). “We will see how it goes, but we need further consultations with our Russian partners (ROSATOM) on how to work in the future,” Vučić said on that occasion (Tanjug 2021).

The memorandum and subsequent law prohibiting the construction of nuclear facilities remain in effect, but Serbia has recently signed significant nuclear cooperation agreements with the Russian Federation. The first agreement was signed in 2018 between the Serbian Minister of Innovation, Nenad Popović, and the General Director of ROSATOM, Alexey Likhachev, at the Atomexpo International Forum in Sochi (RTV 2018). This agreement, although not much noticed by the Serbian public, is actually a blatant indicator of the direction of Serbia’s future energy transition towards nuclear energy. The content of the agreement provided for Serbia’s cooperation with ROSATOM in the development of innovative technologies in the application of nuclear energy for peacetime purposes, especially in medicine and agriculture (RTV 2018). The second agreement on cooperation in the use of nuclear energy for civil needs was signed by the same persons: the executive director of ROSATOM, Alexey Likhachev, and the minister in the Government of the Republic of Serbia, Nenad Popović, in January 2019 (The Government 2019). In October 2019, during the visit of Russian Prime Minister Dmitry Medvedev to Belgrade, an agreement was signed between the Government of Serbia and ROSATOM on the construction of the Center for Nuclear Technologies (ROSATOM 2019b). The Serbian media, intentionally or not, failed to mention the important information provided for in the agreement, which is the installation of a multi-purpose research nuclear reactor with a power of 20 megawatts in the future Center for Nuclear Technologies (ROSATOM 2019b). The last in a series of formal agreements signed between Serbia and Russia in the field of nuclear energy came shortly after Vučić’s statements about

the potential construction of a nuclear power plant in Serbia. In December 2021, the Government of the Republic of Serbia and ROSATOM signed a general framework on the construction of the Center for Nuclear Technologies and the establishment of a joint enterprise for the implementation of this project on the territory of Serbia (The Government 2021). This agreement is the operational realization of the previously planned activities of ROSATOM in Serbia. Minister Popović emphasized the historic day for relations between Serbia and Russia and the agreement, which, as he said, “returns Serbia to the map of European countries capable of developing in the field of nuclear technologies” (The Government 2021). In none of the above three signed agreements, the construction of a nuclear power plant was explicitly mentioned because that would be against the current legislation in Serbia. However, general agreements on cooperation in the field of nuclear energy represent a solid basis for some future arrangements for the construction of a nuclear power plant based on Russian technology.

The Law on Radiation and Nuclear Safety and Security, which established the Directorate for Radiation and Nuclear Safety and Security of Serbia, was adopted under an emergency procedure in 2019 (3OPHCБ 2019). The pro-Western media immediately welcomed these activities and Serbia-Russia cooperation in nuclear matters with suggestive headlines such as “Is Serbia preparing to build a Russian nuclear power plant?” (Radio Slobodna Evropa 2019). This is a legitimate concern that the political establishment in Serbia will soon need to address. It is quite possible that public opinion not well-versed in proven scientific facts about “green” nuclear energy is being timidly prepared. Such a Copernican turnaround, in which it is necessary to change the legislation and convince the people that a nuclear power plant is the best option for growing energy needs, is not easy to do overnight. It is certain that, given the time since Yugoslav nuclear activities were halted, more people are thinking about this than ever before. It is also abundantly evident that Serbia cannot, in the long run, rely on obsolete thermal power plants and low-quality coal, which are among the worst polluters in Europe. Nuclear power would guarantee a constant energy supply regardless of whether the rivers flow, the sun shines or the wind blows.

Conclusion

From what has been said so far, we can draw several basic conclusions regarding nuclear energy and the energy transition in Serbia. First, nuclear energy, despite the flaws that every type of technology has, has the greatest potential for

improvement (fusion and thorium reactors), ensures constant supply regardless of natural conditions, produces the least polluting particles, gives the most energy in relation to the amount of fuel, reduces transportation costs, and, in the long run, it represents the most profitable form of energy production. Second, Serbia is completely dependent on coal and gas in terms of energy, so it is necessary to start the process of the energy transition. The history of the Yugoslav nuclear program and the current modest personnel resources at Serbia's disposal have been analyzed. Building on this, the third conclusion is that Serbia, as a small country, would solve most of its energy problems and needs with one nuclear power plant. Fourth, the environmental reasons for the enormous pollution of coal-fired thermal power plants and the recent collapse of the power system in Serbia accelerate the energy transition and thinking about nuclear power plants. The development of nuclear power facilities is currently prohibited on Serbian soil, but if political will exists, changing the law would be the easiest thing to do. Fifth, Russia is today the largest and most advanced exporter of nuclear technology in the world, which, along with the existing strategic partnership and energy arrangements with Serbia, guarantees certainty in the successful construction of a nuclear power plant, expertise and subsequent supply of nuclear fuel. Finally, Serbia has already taken concrete steps in cooperation with ROSATOM, the most powerful nuclear corporation in the world, with which it has signed several formal agreements. The Serbian political leadership publicly sends messages of cooperation with Russia in nuclear technology and talks about the potential for building a nuclear power plant, either independently or together with one of the neighboring countries. ROSATOM will build a research nuclear reactor in Serbia, and the signed agreements seem to be just the beginning of a much larger cooperation, the crown of which could be the construction of a nuclear power plant.

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Bogdan STOJANOVIĆ

**SEKTOR NUKLEARNE ENERGIJE I SARADNJA SA RUSIJOM
NA PUTU ENERGETSKE TRANZICIJE U SRBIJI**

Apstrakt: U radu se istražuju uopšteno obim i ograničenja nuklearne energije, kao i mogućnost primene nuklearne elektrane u kontekstu neophodne energetske tranzicije u Republici Srbiji. Energetska saradnja Srbije i Rusije već postoji u sektoru fosilnih goriva i snaga Rusije je bez premca na globalnom nivou. Kao najveći snabdevač evropskih zemalja gasom i naftom, Rusija snagu svojih resursa koristi u spoljnopolitičke svrhe, tako da čak ni aktuelni rat u Ukrajini nije zaustavio snabdevanje gasom Evropske unije. Autor analizira moć ROSATOM-a kao najvećeg svetskog izvoznika nuklearne tehnologije i mogućnosti da Srbija iskoristi strateško partnerstvo sa Rusijom u postizanju dogovora oko izgradnje nuklearne elektrane. Rad je zasnovan na realističkoj teorijskoj postavci međunarodnih odnosa. Osnovna hipoteza je da Srbija na putu energetske tranzicije mora postepeno da smanji zavisnost od termoelektrana na ugalj, koje su, sem što su neefikasne, istovremeno i veliki zagađivači životne sredine. Najbolje rešenje bi bilo izgradnja nuklearne elektrane po ruskoj tehnologiji. Srbija je već preduzela korake na unapređenju saradnje sa Rusijom u nuklearnoj oblasti kroz nekoliko sporazuma koje je potpisala u periodu od 2018. do 2022. Ti sporazumi predstavljaju solidnu polaznu osnovu za ukidanje zakona o zabrani izgradnje nuklearnih elektrana i sklapanje aranžmana za izgradnju takvog postrojenja na teritoriji Republike Srbije.

Ključne reči: nuklearna energija, nuklearna elektrana, Srbija, Rusija, energija, energetska tranzicija, energetska bezbednost, energetska diplomatija, ROSATOM.

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Emerging and disruptive technologies in the Western Balkans: Do we need a new arms control regime?

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Abstract: The subject of this paper is to examine the relationship between the emerging and disruptive technologies and the sub-regional arms control regime in the Western Balkans, established by the Agreement on Sub-Regional Arms Control, signed on June 14, 1996, in Florence. The main research question is: Do the emerging and disruptive technologies that the Western Balkans countries possess or are planning to acquire influence the existing arms control equation in the Western Balkans and, if yes, do we need a new arms control regime? Authors explore this question through the analysis of emerging and disruptive technologies that have taken roots in the Western Balkans and are likely to grow significant in the future, and the sub-regional arms control regime, taking emerging and disruptive technologies as one of the variables that challenges the existing arms control regime in this region. They compare the current emerging and disruptive technologie capacities that Western Balkan states possess, as well as the potential of those emerging and disruptive technologies to disrupt the balance of forces set by the Agreement. The authors conclude that, although we do not need a completely new arms control agreement in the Western Balkans, having in mind the flexibility of the existing one, a responsible approach would include an update of the current arms control regime, especially regarding the new confidence and security building measures, including increased transparency on the acquirement and the nature of potential use of emerging and disruptive technologies.

Keywords: emerging technologies, disruptive technologies, arms control, sub-regional arms control, Western Balkans.

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Introduction

In mid-June 2023, the Agreement on Sub-Regional Arms Control signed in Florence in 1996 will mark 27 years of its existence and implementation. It is a cornerstone of the arms control regime established in the Western Balkans after the dissolution of the Socialist Federal Republic of Yugoslavia and the disastrous wars that involved four of six former Yugoslav republics – Serbia, Montenegro (then together in the Federal Republic of Yugoslavia, which was an original signatory state party of the Agreement), Croatia and Bosnia and Herzegovina (hereinafter: BH).³ These federal republics became states and a peace agreement for BH concluded in Dayton (USA) in 1995 — the General Framework Agreement for BH, Annex 1-B (Agreement on Regional Stabilization) — provided for the conclusion of three separate instruments aimed at preservation of an established balance of power and stability among them. These three instruments were: 1. an agreement on confidence and security building measures (hereinafter: CSBMs) in Bosnia and Herzegovina (Article II Agreement) that was signed on 26 January 1996 in Vienna and terminated on September 2004 after BH created federal ministry of defence,⁴ 2. a sub-regional arms control agreement (Article IV Agreement) signed on 14 June 1996 in Florence, implemented in November 1997 and is still in force and, 3. a “Regional arms control agreement” with a goal to establish a regional balance “in and around the former Yugoslavia” and provided for the establishment of “regular inspections” by other parties and a “commission together with representatives of the OSCE” (Article V Agreement). The Concluding Document, which was the result of the negotiations on Article V signed on 18 July 2001 and has been in effect since 1 January 2002, is a politically binding document

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³ For the purpose of this paper, the Western Balkans refers to the states parties to the Agreement on Sub-Regional Arms Control — Republic of Serbia, Montenegro, Republic of Croatia and Bosnia and Herzegovina.

⁴ Parties to the Article II Agreement - BH, the Federation of Bosnia and Herzegovina and the Republika Srpska - concluded in the fifth and last Review Conference that the Article II Agreement has been fully implemented and signed the Agreement on the Termination of Article II on 28 September 2004 at the 44th Joint Consultative Commission (JCC) meeting in Sarajevo.

which does not contain any arms limitations or verification measures, but only CSBMs among 20 participating states (Fladeboe 2004).

During its existence, the Article IV Agreement has faced many challenges, some of them we will consider in short in the next part, but this paper deals specifically with the emerging and disruptive technologies in the Western Balkans, as a specific category of challenges to the WB arms control regime. They are challenging from at least two perspectives. One is sub-regional and considers the influence on and possible changes of the established balance of power among the states parties to the Agreement depending on their military application and another is wider and involves broader relationship between NATO and Russia/China and is primarily focused around the procurement of new armament and military equipment, including emerging and disruptive technologies (hereinafter: EDTs). The Agreement has, however, endured, not only thanks to various foreign factors, but also domestic ones, including the willingness and acting of policymakers of countries involved.

Today, the states of the Western Balkans are arming and gearing up, under the impacts of arms conflicts across the world, new polarization among the great powers, modernization of numerous armies in the region and across Europe, as well as according to the requirements of their security system, aligned with their strategically identified security threats and challenges. These armaments and gearing up include procurements and attempts to develop their own emerging and disruptive technologies, which is why one may ask whether and to what extent acquisitions of these technologies with a possible military use disrupt the current sub-regional arms control regime and should they be included in the regime, besides the ongoing, mandatory limiting elements. The answer to these questions will mostly depend on whether possession or planned acquisition of these weapons disrupts or has a potential to disrupt the balance of forces and stability achieved between the WB countries, established by the Agreement. Possible control of emerging and disruptive technologies with military use is deemed within the regional framework in this paper, but it also has a broader, European significance, since the sub-regional arms control itself is derived from the conventional arms control in Europe and the Treaty on Conventional Armed Forces in Europe (hereinafter: CFE), from 1990. This matter does not have a defined answer within the European framework, which makes this research even more important.

The primary hypothesis of this paper is that emerging and disruptive technologies that the Western Balkans countries possess, or plan to purchase, can have a disruptive impact on the current balance of forces and stability between the countries, and therefore, affect the implementation and effectiveness of the Agreement on sub-regional arms control. In order to check the hypothesis, we use methods of analysis, including content analysis of the treaties regarding conventional arms control in

Europe and WB, as well as strategic documents of the Western Balkan countries, and analysis of public statements and surrounding narrative of their respective' officials on weapons and military equipment procurements. We also use comparative method, in order to perceive the current and possible future military capacities of the Western Balkan countries, especially procurements of EDTs and their impact on the current balance of forces and stability between the state parties of the sub-regional arms control. We have concluded that EDTs, having in mind their disruptive potential, should be discussed not only within the Sub-Regional Consultative Commission, but in other forums as well, where political and military officials of the Western Balkan countries meet, since it could build trust and increase transparency over the acquisition and potential use of such technologies. Eventually, EDTs may be included in the current regime of the sub-regional arms control through amendment of the ongoing Agreement on Sub-Regional Arms Control, or a new agreement that could define confidence and security building measures in regard to possession and use of these technologies in the Western Balkans. Also, to a greater extent, if ever agreed, a conventional arms control regime that would include EDTs in the area now covered by the CFE, could be extended to the Western Balkans.

The paper starts with the definition of emerging and disruptive technologies and adaptation of that concept to the framework of this paper and analyses relations between the arms control and EDTs. It then gives an assessment of the challenges the Agreement has faced and is still facing and its flexibility to cope with them, with the final aim to explore and compare capacities in emerging and disruptive technologies that the Western Balkan countries have, deeming whether they can upset the current regime of sub-regional arms control.

What are Emerging and Disruptive Technologies?

There is no generally accepted definition of the EDTs concept at this moment and, therefore, the concept is being defined through mutual characteristics, and adapted according to a researching area in which it is used. These technologies are increasingly touching all aspects of life. This paper will narrow the focus on the concept of the EDTs in the area of security. The international security literature usually uses the term "emerging and disruptive technologies (EDTs)" as a whole to mark not only the importance of evolution of technology for international security, but its disruptiveness as well. First part of this concept – emerging – refers to the: a) new, young technologies, technologies that have just been created or developed, and b) older technologies with new fields or ways of implementation and application. Therefore, these are technologies

whose core has just recently been set or their applications discovered and tested in the new ways and fields, along with a continuous learning about their capacities and consequences – positive and negative – in their practical use. The NATO Science & Technology Organization (STO) (2020, 6) includes a specific timeline, when defining what should be considered as an emerging science and technology trend. Emerging are technologies or scientific discoveries “that are expected to reach maturity in the period 2020–2040”. Even if one does not want to accept and include this timeline in the concept of the EDTs, the aforementioned definition helps us to put these technologies and their level of development into a wider timeline and understand that they are our present and the very near future. If these emerging technologies have a potential to disrupt some previous condition, practical relationship, or, in general, any correlation or causality, they are termed disruptive technologies. According to NATO STO disruptive are “technologies or scientific discoveries that are expected to have a major, or perhaps revolutionary, effect on NATO defence, security or enterprise functions” (NATO 2020, 6). The study Persistent Forecasting of Disruptive Technologies (NRC 2010, 11), for example describe disruptive technologies as those that can disrupt or break the previous flow of events, process or activity, implicating confusion or disorder (chaos), or a significant disruption of some structure, as well as discontinuity. The same study explains that the emerging technologies reflect a rise, becoming significant and visible. In this sense, for emerging technologies it is not only important when they were created, but when they become visible and significant for a broader audience, with demonstrated potential to disrupt an existing order, environment, or capacity.

A very important question arises here: when does a technology become disruptive? Certainly, we cannot identify an exact moment, number or some specific criteria, but we can elaborate that a disruption is taking place in practice when a technology improves rapidly and is becoming a mainstream, and very competitive, challenging with other technologies. As it continues to develop, it grows a potential to displace existing technologies, or flow of events, they “upend the *status quo*”, often requiring significant adaptation and reorganization by those affected. From the arms control perspective, it is important that these technologies have applications in the security field and can have significant impacts on the stability and peace in a certain area, meaning that they have a potential to disrupt previously established balance of forces between parties, by giving a certain party a strategic military advantage, to potentially become overpowering, necessitating new approaches to warfare, defence and, of course, new approaches to the arms control. According to the European Defence Fund, a technology becomes disruptive in terms of defence when it develops as an “enhanced or completely new technology that brings about a radical change, including a paradigm shift in the

concept and conduct of defence affairs such as by replacing existing defence technologies or rendering them obsolete” (European Parliament 2022, 1).

When it comes to defining the EDTs concept in regional international security literature, especially from the Republic of Croatia, a term disruptive innovation is also often in use, invoking the definition set by the Harvard professor Clayton Christensen, in *The Innovators Dilemma*. There Christensen claims that disruptive innovations represent a product or service that initially takes root in simple applications at the bottom of a market and then relentlessly moves upmarket, eventually displacing established competitors. In this way it also emerges (Christensen 1997). Some authors give general definitions of EDTs, deeming them as technologies and technological applications that are not yet completely developed, but are in the process of development, and with a potential to disrupt a global stability and security (Favaro 2022, 2). One of the Stockholm International Peace Research Institute’s (SIPRI 2022) conclusions points out that a specific characteristic of these technologies is that not only that they can amplify each other, but can converge, interact with older technologies as well. At the same time, the term EDT can also refer to the convergence of several older technologies in an innovative way, thus creating a new product or service.⁵ When writing about nuclear security and possible implications in this area, Andrew Futter (2021, 2) defines the EDTs as weapons, systems of support and subsystems that are significantly improved, or have been recently fielded, or could be developed in recent future, having a potential to change the way by which nuclear operations are being conducted, or how order, command and control, stability, deterrence, arms control escalation and crisis management function in the area of nuclear security. When identifying possible ways to defeat the US armed forces, the four-year defence review by the Department of Defence (NRC 2010, 8) mentions disruptive strategies that are used as methods of technological surprise, such as cyberattack, or anti-satellite weapon. Even a new form of warfare – disruptive warfare – has been established.

Regarding the scope of the notion of emerging and disruptive technologies there is also no general agreement and different authors put various things into it. For example, the European Defence Agency lists six technologies: quantum-based technologies, artificial intelligence, robotics and autonomous weapons systems, big data analytics, hypersonic weapons systems and space technologies, and new advanced materials (European Parliament 2020, 1). The NATO’s strategy on the EDTs focuses on nine primary areas, such as: artificial intelligence, data, autonomy, quantum-enabled technologies, biotechnology, hypersonic technology, space, novel material and manufacturing and energy and propulsion (NATO 2022). Victor Gervais

⁵ Social networks, such as *Facebook*, can serve as an example here.

(2021, 4), for example, enlists five key military technologies in development that have a potential to play a significant role in a future warfare – robotics and autonomous systems, hypersonic weapons, directed-energy weapons, biotechnologies and quantum technologies. Jane Vaynman (2021) considers the small satellites, drones, artificial intelligence and 3D printing technology as those that renewed arms control regimes should include. Additionally, the Learning Unit on emerging technologies of the European Union's Non-Proliferation and Disarmament Course considers visible EDTs such as unmanned aerial vehicles (hereinafter: UAVs), military robots and hypersonic vehicles, invisible such as nanotechnology and artificial intelligence and elusive threats such as non-lethal weapons, 3D-Printing, synthetic biology and cybernetic organisms (NPDC E-Learning Course LU 15).

Bearing in mind that this paper considers implications that the EDTs could have on balance of forces and arms control between the states of the Western Balkans, we will adapt the definition, to fit the framework of this paper. As stated before, we will narrow our focus on the concept of the EDTs in the area of security, primarily their military aspect. Therefore, the EDTs include completely new technologies, significantly improved old ones, or innovatively converged old technologies, able to disrupt arranged, as well as current balance of forces. These technologies can ensue these changes in at least four ways: 1. by accumulating significant strategic military advantages to a certain state party, through procurement or development of such a technology, which can, then, trigger the first strike, 2. through a significant upgrade of some of the treaty limited elements (hereinafter: TLEs), making the numerical ceilings and balance obsolete, insignificant and forcing a “weaker” side, or sides, to surpass this situation through quantitative increases of some of the TLEs, 3. by affecting a set verification regime, by, for example, improving the possible concealment of some of the TLEs and 4. by the possibility to disrupt the functioning of existing military capabilities and infrastructure.

In accordance with the previous, we will analyse what EDTs are most commonly connected to arms control regimes, what challenges do they represent to the regimes, as well as whether they could, realistically, have a potential to disrupt the agreed and present balance of forces between the Western Balkans states.

EDTs and Arms Control

Since the EDTs affect the way of preparing for war, as well as the way of waging it, we can ask how and what consequences on arms control regimes do they have. As Bauer (2020) notices, from the arms control perspective, having in mind a dual

nature of the EDTs, the focus is on the emergence of security and military applications of technologies, rather than the emergence of technology as such. From our point of view, the arms control perspective regarding the EDTs, should also include the examination of whether these technologies give a significant military advantage to some of the actors, thus challenging the existing balance of power, whether they increase the motivation of these actors for attack, and if so, in which way, do they impact the established verification mechanisms and can disrupt the functioning of military infrastructure of states. In the case of a positive answer to these questions they must be included or added to existing arms control regimes.

The ongoing conflict in Ukraine examples how important it is to retain control of conventional weapons covered by the Treaty on Conventional Armed Forces in Europe or the Agreement on Sub-Regional Arms Control, but also that the EDTs are becoming more and more important and visible, as well. That is why, these conventional arms control regimes, although they should be preserved, must also be flexible enough to include the EDTs. They could be, for example, upgraded through an annexes, or a new document, such as "The EDTs Code of Conduct". That would certainly contribute to increased trust between the states, regarding to procurements and developments of the emerging and disruptive technologies and their applications and capabilities, mitigating or removing a security dilemma. The actors today should not wait serial production and battlefield deployment to take place, ensuing enormous destruction and/or loss of human lives to negotiate agreements on arms control that include EDTs, but to act preventively, more responsibly and negotiate faster and agree more effectively, because potential consequences to strategic stability, as well as possible damage, can be severe.

Regarding the control criteria, especially those of numerical limitations, they cannot be successfully applied to many EDTs. How could we, for example, limit cyber activities since possible limitations of lines of code are simply useless? Or, how could we numerically limit artificial intelligence? Having the said in mind, one approach is noticeable in literature, according to which application of an entire technology in a certain area should be banned, for example, introducing artificial intelligence to military weapons systems and gear. Although, this approach could prevent many unwanted consequences, such as, for example, a misidentification of friendly forces as of enemy's, it would simultaneously denied many positive aspects, such as, assistance of a computer, enforced with artificial intelligence, helping surgeons in a mobile operating room. At the same time, it is unlikely for policymakers and military officials, especially of those states that have invested billions of their taxpayers' money and are, therefore, leading in development and application of a certain EDT, to easily walk away from possible advantages that the emerging and disruptive technologies offer over their adversaries.

Instead of the object-countable criteria of control, seeming unsuitable for many of the emerging technologies, some experts suggest a behaviour-based criteria of control (Bohn 2022). This approach would define an EDT use by proposing a desirable, responsible, ethical behaviour (both active and passive) when applying a certain technology. This approach would, ideally, allow positive aspects of an EDT application, whilst banning those with negative consequences.⁶ This approach is significantly better, more practical and realistic than the one with a full ban on an EDT application, but is open for an objection, for example, being not able to predict all the possible behaviours with potentially negative impacts (especially when it comes to artificial intelligence). Besides, there is a possibility to limit certain functions of developing such technologies. For example, in the EU Non-Proliferation and Disarmament Consortium's E-Learning Course Unit on emerging technologies (EU NPDC E-Learning Course LU 15, 35), it is stated that "not the autonomous system as such but its 'kill function' needs to be subject of regulation". This represents a functional approach to EDTs arms control. Therefore, what we need is a combined approach that would merge positive experiences from the conventional arms control agreements, as well as specific features and applications of every EDT. Two most significant actor categories are to be recognized in the operationalization of these combined approaches: academia and experts, already engaged in developing new, responsible, ethical approaches, as well as policymakers and military officials, whose will for effective limitations, responsible behaviour and negotiation in general, are key to coming to an agreement on arms control that would really have a practical value.

Means, or measures of verification have shown very useful in practice in building trust between state parties, and, of course, stability and security, as well. Traditional on-site inspections are much more suitable for those technologies which products are countable – drones, hypersonic missiles, autonomous weapon systems - but problematic when it comes to artificial intelligence, cyber tools, even nanotech. On the other hand, the very purpose of the present arms control agreements – post-conflict stabilization, preventing or stopping arms race, respecting (international) humanitarian law and more – are completely fit to replicate onto those agreements that would serve to control the EDTs applications in weapon systems.

A specific problem in connection to these agreements, even bilateral ones (and especially with regional, or even multilateral, global ones), regards to the negotiating process. It is very important here to underline the time-frame of negotiating, and hardships of ratification of what had previously been negotiated,

⁶ In this sense, means of cyberwarfare could be banned from using to attack non-military infrastructure, that is, the infrastructure which damage or destruction would not affect adversarie' military capacities, but would trouble civilians.

because one of the EDTs features is a very rapid and often exponential development. This could mean in practice that what was previously agreed now becomes obsolete, not applicable in the moment of ratification, which can easily serve as an excuse for state parties not to cooperate accordingly.

EDTs in the Western Balkans: Can they disrupt the present balance of forces and be included in the Agreement?

Flexibility of the Agreement on Sub-Regional Arms Control in the face of many challenges

In analysing the Agreement on Sub-Regional Arms Control in the Western Balkans in order to include EDTs, it is important to have in mind the goals for which the mentioned agreement is negotiated, as well as the most significant reasons of its successful implementation. Simultaneously, it is important to include factors such as still unresolved territorial issues and the status of Kosovo and Metohija, different defence options, strategic perception of a neighbouring country, recent military spending of the Western Balkan countries, political will for negotiating and implementing an international agreement of any kind, and nature of international relations in general. Rising conflict between great powers significantly impacts the area of the Western Balkans, affects the level of trust and balance of forces between the state parties of the sub-regional arms control agreement. This approach systematically reckons main global and regional factors, affecting presence, development and application of the EDTs, along with their eventual consequences on a present balance of forces and arms control.

First, the sheer purpose of the Florence Agreement is in setting obligations for the state parties, in order to create an environment suitable to advance post-conflict stabilization in the region, build trust and cooperation and prevent another conflict and arms race between the states parties to the Agreement. Furthermore, the successful implementation of the Agreement is not only a result of a really responsible behaviour of the state parties, but international factor is also important in many ways. First of all, the agreement was signed under the supervision of the OSCE, while the NATO forces on the ground deterred the use of force to solve disputes between the Western Balkan countries (Ejdus 2012). Moreover, given the strategic commitment of all WB countries to the European Union membership, a pressure in terms of conditionality policies is also one of the factors of the

successful implementation. Having in mind the successful implementation of the Agreement, we can conclude that the political factor is crucial.

Today, the state parties still respect numerical limitations, and conduct agreed measures of verification and information exchange (Marković and Petrović 2021). State parties to the Agreement have obliged themselves to norms to achieve a post-conflict stabilization, prevent an arms race, and build trust, stability and security in their environments. Modelled after CFE Treaty, the Agreement as well limited the number of tanks, armoured combat vehicles, artillery (calibre greater than 75mm), combat aircraft and attack helicopters of the three original states participating in the Agreement according to the 5:2:2 ratio, based on the approximate ratio of populations of the Parties. The Agreement (Annex 1-B, article IV) provided for other criteria, besides population size, such as military armament holdings, defence needs, and relative force levels in the region, but also stated that in the absence of an agreement on the exact criteria, the approximate ratio of the population size would serve as a basis for determining balance of forces. According to this ratio, the “baseline” was the determined holdings of the Federal Republic of Yugoslavia. The limit for the Federal Republic of Yugoslavia was set at 75% of the baseline, while for the Republic of Croatia and Bosnia and Herzegovina it was 30% of the baseline. The allocations for Bosnia and Herzegovina were further divided between the Entities on the basis of a ratio of two for the Federation of Bosnia and Herzegovina and one for the Republic of Srpska. The parties also agreed to voluntarily limit their military manpower: FRY 124,339, Croatia 65,000 and BH 60,000 troops. In 2007, according to the bilateral agreement between Serbia and Montenegro, the FRY limits were divided – 67% for Serbia and 8% of the FRY of the baseline for Montenegro. The Agreement also obliges states parties to hold force levels on and below the limits, annually exchange information on and allow inspections of their military holdings, and has established the Sub-Regional Consultative Commission, the main implementation body which holds its meetings twice a year. Although originally signed under the supervision of the OSCE, in 2015 it was left to the state parties to enforce the implementation of the Agreement.

The state parties are united in marking the Agreement as one of the most significant stabilization factors in the Western Balkans up to this day. During 1999 and the war with NATO, the Federal Republic of Yugoslavia suspended it, but soon after returned to its compliance. It changed parties several times due to the unification of the armed forces in BH and the further change of state structure in 2003 and dissolution of the Federal Republic of Yugoslavia in 2006. The original Agreement has been amended three times. In 2006, when the defence ministries of the two entities in Bosnia and Herzegovina were terminated and responsibilities transferred to the state level, the number of acting parties of the Agreement were reduced to three: BH,

Croatia and the State Union of Serbia and Montenegro. In 2008, after Montenegro became a party to the Agreement in January 2007 and signed a bilateral agreement with Serbia on the principles and procedures for implementing the Agreement. For the third time, the Agreement was amended in 2015, after state parties took responsibility for the implementation of the Agreement from OSCE.

Unilaterally declared independence of Kosovo⁷ in 2008 and the development of the Kosovo Protection Corps into Kosovo Security Forces and since 2018 almost an army, with significant military personnel and equipment, is posing another important challenge to the sub-regional arms control regime, since only demilitarization of Kosovo Liberation Forces was part of 1999 agreements for retreat of Serbian forces and establishment of international military presence in the province.⁸ Thus, an inclusion of some kind of “Kosovo Army” in the Sub-Regional Arms Control agreement would theoretically imply the recognition of the status of current so-called Kosovo security forces as a Kosovo’s military/Armed Forces. In such case, the same method as with Montenegro could be applied – further sharing of the FRY limit now to three parties – Serbia, Montenegro and Kosovo. After independence, Serbia’s limit was set to approximately 67% of the baseline, and Montenegro’s to 8%. In the case of inclusion of Kosovo, having in mind the population ratio, the division would be approximately between 43% of the baseline for Serbia and 14% for so-called Kosovo. The other extreme option for Serbia, in case of further non-recognition of so-called Kosovo and its Army, would be the suspension or withdrawal from the Agreement until some limits and guarantees for the development of Kosovo Security Forces are set (or complete demilitarization), which would on the other hand risk the established level of cooperation and arms control among the parties. Between the recognition of so-called Kosovo and its Army, and its inclusion in the Agreement as a signatory party, on the one hand, and Serbian withdrawal from the Treaty in search for the demilitarization of Kosovo, on the other, maybe lies a “grey area” which should be explored, if needed. The question of do we need Kosovo in the arms control agreement, and, if yes, how, certainly deserves a separate research.

One more challenge to the established balance of forces and stability among the state parties, especially from the defence options point of view, regards the NATO enlargement. Croatia has been part of NATO since 2009 and Montenegro since 2017, while Serbia and BH entity Republic of Srpska declared their military neutrality. Also,

⁷ All references to Kosovo in this document should be understood to be in the context of United Security Council resolution 1244 (1999).

⁸ The Kosovo’s Ministry of Defence was formed in 2018.

failure to reach the Article V Agreement – “Regional arms control agreement” – with the goal of establishing a regional balance “in and around the former Yugoslavia” is not of less importance. Austria, Albania, Slovenia and North Macedonia are not part of any arms control agreement (CFE or on sub-regional arms control) and arms limitation and verification measures. Austria is militarily neutral, while Albania (since 2009), North Macedonia (since 2020) and Slovenia (since 2004) are NATO members.

Regarding strategic documents on national security of the Western Balkan states, they perceive immediate security environment in a similar way, concluding that certain security challenges and threats come from the neighbourhood, as well as that the possibility of an aggression is decreased, but not entirely excluded. Through a comparative analysis of the states’ military spending for 2017-2021 timespan, increased spending for armed forces are noticeable, especially in the cases of the Republic of Croatia and the Republic of Serbia (SIPRI 2021). Also, a noticeably decreased transparency of planned spending must be pointed out. On one side, there might be some security advantages of such an approach, but this practice, especially if it intensifies in the future, could have a destabilizing potential for relationships in the region, raising doubts about the real intentions of the parties to arm themselves.

Political rhetoric is an extremely powerful factor in creating and moulding social-political processes, and can have a stabilizing, or escalating potential. Experiences from events on the area of the former Yugoslavia in the last thirty years teach us that irresponsible, populist rhetoric can trigger catastrophic consequences. In the recent years, it seems that the rhetoric between the highest policymakers in the Western Balkans is becoming increasingly irresponsible. Bearing in mind the lack of real success in creating prosperity and rule of law, political elites use an ungrounded, intolerant, often vulgar rhetoric that sometimes turns into chauvinism, all in order to gain political points in the process of obtaining and retaining power. Clearly, this practice does not contribute to building trust and cooperation, on contrary, it can surely have a destabilizing potential.

In the end, the growing conflict in relationships between great powers — especially in the light of Russia’s military campaign in Ukraine and perception of China as the main competitor to the United States — also affect the relationships between the state parties of the sub-regional arms control agreement. Having in mind the defined national interests of the Republic of Serbia and Republic of Srpska in Bosnia and Herzegovina and their procurements in armament connected to the EDTs, distrust in state’ intentions are increasing, along with the increasing conflict potential.

Summarizing the mentioned factors, ongoing on the area of the Western Balkans, we can conclude that the security environment in the area is complex, with overlapping stabilizing factors, such as the present arms control regime and

tendency to EU integration, and destabilizing ones, such as the flammable, populist political rhetoric, progressive increase in military spending, characterized by decreased transparency, and relationships fuelled with great powers competition. The shaping of this conclusion is important, because of the projections on the EDTs disruptive potentials, appearing in the Western Balkans, because no technology itself is a key factor in provoking and escalating a crisis, but rather the broader political context in which technology is used.

On this occasion, it was important for us to point to the flexibility of the Sub-Regional Arms Control Agreement, despite of many challenges, in order to get to the possibility of one more transformation - to address and include the issue of emerging and disruptive technologies for the purpose of maintaining the balance, stability and predictability among the state parties in the WB.

Who possesses what: Can the EDTs in the Western Balkans disrupt the existing balance of forces?

This part of the paper focuses on the overview of the EDTs currently present in the Western Balkans region — according to the publicly available data — as well as those which development and more intensive application, according to the current science and technology trends and capacities, could be expected in the upcoming period: unmanned aerial vehicles — drones, artificial intelligence, small satellites and tools for cyberwarfare. While analysing their potentials to disrupt the present balance of forces, their independent applications will be considered, as well as their convergence with older technologies, in order to upgrade the later ones in an innovative ways. On the other hand, application of nanotech in the area of military weapons and gear at armed forces of the Western Balkans countries does not represent a significant factor, because there is no publicly available data regarding a development or application of this technology at this moment. Situation with lethal autonomous weapon systems is similar. Operating autonomy and autonomous weapons as notions/terms are often wrongly interpreted and used in public statements given by policymakers, military officials, even experts, and analysts or commentators. No publicly available data indicates that autonomous weapon systems are present in the area of the Western Balkans at the moment, but there are those with automatized operating modes, or automatized actions. The hypersonic missiles technology currently remains out of reach for the WB states.

Drones do not represent a new technology anymore, but their development (as well as development of the connected technologies, such as the GPS and satellite communication links), increasing and diversifying application in armed conflicts of

various types, point to a significant disruptive potential in balance of forces, as well as the potential to change characteristics of modern warfare – already seen in Nagorno-Karabakh conflict, as well as in the ongoing one in Ukraine. One of the significant appealing factors to develop, procure and use aircrafts of this type is their affordable price. Namely, “... aerial vehicles of this type are, as a rule, significantly cheaper than combat aircrafts and helicopters, decreasing a damage in case of a loss, while having a potential, on the other hand, to destroy much more valuable assets” (Jevtić 2021, 41). Therefore, they allow armed forces with low budgets to engage in the so-called asymmetric conflict, in terms of conducting reconnaissance-combat activities traditionally reserved for very expensive aerial systems. Also, not only that drones are suitable for an independent use, but they are an excellent examples of how a new technology can converge with an older one in order to improve the later – for example, drones can effectively be used to mark targets or correct artillery fire. The reason why drones are included in this research – even though they are not an emerging, but already emerged technology at the moment – is that, first, the acquisition and development of this technology have gained momentum pretty recently in the region and, second, drones are being widely discussed and promoted among top military officials and policymakers in the region.

Through a comparative analysis of the publicly available and confirmed information regarding the presence of drones in the armed forces of the Sub-Regional Arms Control Agreement states parties, first of all, we can conclude that these systems appeared in the region, due to completed procurements from outer partners such as Israel, China and Turkey. Various Turkish drones are being increasingly mentioned lately as possible procurements for the armed forces of the Republic of Serbia and those of Bosnia and Herzegovina. The Croatian Ministry of Defence promoted the Israeli *Orbiter 3B* system, manufactured by *Aeronautics*, in 2019 for the first time, as a system that will significantly improve data-collecting and reconnaissance capacities⁹ (MORH 2019). The Israeli *Elbit Skylark 1* systems are in use at the Croatian armed forces for several years now, and public information regarding a total number of 4 operational pieces should be taken with reserve.¹⁰

The first armed drones of the Air Force and Air Defence (AFAD) of the Serbian Armed Forces have been fielded thanks to the military-technical cooperation between the Republic of Serbia and China. Foreign sources point out that the procurement was arranged in 2018 (New America 2022), while Serbian media

⁹ Information regarding the delivery of a total of six UAVs of this type are not publicly available.

¹⁰ Some media reported that in March 2022 one UAV of this type was taken down above the city of Kosovska Mitrovica (Novosti 2022).

released this news during 2019, and a number of six *CH-92* UAVs were promoted in July 2020 for the first time. The same source recognizes the Republic of Serbia as the only Western Balkans country in possession of armed drones. As a result of a technology transfer within the Serbian-Chinese military-technical cooperation, the Serbian arms industry project *Pegasus* has been successfully developed and the process of fielding is ongoing. The short-range *Sparrow* UAV, also one of the Serbian arms industry projects, is designed to conduct scouting and reconnaissance tasks. In connection to development of the national capacities, there is also a role of the private companies in the Republic of Serbia such as *Pink Research and Development Centre* which develops UAVs for civilian use, but also cooperates with the Ministry of Defence and Serbian Armed Forces. The *Damiba Trade Company* is a successful supplier for the needs of the Serbian Ministry of Defence and Ministry of Internal Affairs, and in August 2020, it won a tender to deliver 4 commercial aircrafts to the Montenegrin Ministry of Defence, planned to be used in search & rescue tasks, as well as in training of personnel (Tango Six 2020). The procurement of the four UAVs is by far the only publicly available information in regard to the UAV capacities of the Montenegrin Armed Forces. Starting from 2020, there is some unconfirmed information regarding interests of the Armed Forces of Bosnia and Herzegovina, to acquire Turkish drones of various types, from those reconnaissance ones, to the so-called kamikaze-drones, but there are no publicly available data on completed procurements at the moment. According to statements from the highest political and military officials, the Republic of Serbia is also interested in Turkish-made UAVs, especially those armed ones, such as *Bayraktar TB2* (OVD 2022).

Comparing the current capacities and stated interests, including possible procurements, it is clear that the capacities of the AFAD of the Serbian Armed Forces are currently the strongest, especially in terms of armed UAVs. However, publicly available information suggest that the armed forces of the state parties to the Agreement in the Western Balkans possess only a modest number of different UAVs, from several, to maybe, a dozen. Those potentials are for now not able to disrupt the balance of forces, but in future, especially if the procurements and developing capacities of the national arms industries intensify, could trigger arms race. This is where their combat fielding with its ensuing consequences comes into a spotlight. Reconnaissance and armed, combat drones are being extensively used and their effectiveness is being confirmed in ongoing conflicts, especially in Ukraine. When it comes to armed drones, the so-called kamikaze drones are being fielded more extensively (both individually and in swarms) and are proving to be effective against enemy personnel, fortified positions, as well as against much more complex and expensive systems, such as tanks, artillery pieces etc. These are among the main reasons for their increased demands on the market. Many policymakers are

literally racing against themselves to lock deals on drones at international exhibitions and introduce them to public afterwards. And, if we wrap these facts with their significantly affordable price, as well as with the fact that the technology has already taken roots in the WB, we can offer a simplified projection: drones, especially armed ones — particularly kamikaze versions — will probably grow significantly in numbers in the region. And if the AFAD of the Serbian Armed Forces is leading the way at the moment, we can also expect other actors to beef up their capacities, in order to prevent the Serbian part to overpower. This is why we believe that drones have a strong potential to disrupt the ongoing balance of forces in the WB and should be part of arms control in the region. Besides this arms race perspective, in the strained international relations, gaining such a technology from actors like China in the NATO environment pose another side of the reason why arms control and CSBMs should be endorsed in the region.

When it comes to development and application of artificial intelligence, systematic overview of the current capacities represents a much bigger challenge for an outer observer, therefore those conclusions derived from public information should be taken with reserve. This is due to several factors. First of all, it should be noted that the development of artificial intelligence is very costly, therefore, the richest countries, such as the USA and China, lead the way, as well as the multinational companies, such as *Google*, or *Facebook*. The States in the Western Balkans do not have significant developing capacities at this moment. Nevertheless, this notion is often being used in public statements given by political, military officials, experts, commentators etc, usually incorrectly. This is commonly because of misinterpretation of terms such as narrow and general artificial intelligence. In assessing the current capacities of the Western Balkans states in application of artificial intelligence, we can use the Government AI Readiness Index, created by Oxford Insights and International Development Research Centre. According to the 2020 index, Serbia was in 46th, Croatia in 58th, Montenegro in 70th and Bosnia and Herzegovina in 100th place (Oxford Insights 2020). The Report from 2021 ranked Serbia in 52nd, Croatia in 61st, Montenegro in 75th, and Bosnia and Herzegovina in 96th place (Oxford Insights 2021). Report from 2022 ranked Serbia in 61st place, Croatia in 68th, Montenegro in 78th and Bosnia and Herzegovina in 114th place (Oxford Insights 2022). The Republic of Serbia is the only among the mentioned countries to have issued a special strategic document in regard to artificial intelligence — The Strategy for the Development of Artificial Intelligence in the Republic of Serbia for the Period 2020-2025 (Official Gazette of the RS, No. 96/2019).

Artificial intelligence (hereinafter: AI) application in the area of military armament and gear has a huge potential. The technology can be implemented independently, or used for significant improvements of older technologies, for

example to beef up target recognition and acquisition in armed, or obstacle avoidance in reconnaissance drones. Or, when it comes to managing complex armed systems, an advanced AI software has an enormous potential to speed up decision making, both in attacking and defending operations, especially against multiple and/or fast-moving targets – scenarios in which human operators cannot compete in terms of effectiveness. In other words, an AI software can amplify the scale and/or intensity of a military operation much more than trained human operators and win a crucial strategic advantage. However, these capacities are not fully transparent in the world, because the development, testing and application are both very expensive and exponentially beneficial. Furthermore, given the aforementioned and considering the global and ongoing debate on whether should we move away from, or fully embrace the development and application of AI, one may argue that it will probably take some time before we witness a more extensive use of the AI powered systems on the battlefield. can conclude, therefore, that a conscience about artificial intelligence in the Western Balkans is developing, as well as that the current capacities, most likely, do not have a potential to disrupt the balance of forces, but it could be the case in the future, if, for example, a significant transfer of technology occurs, either between the NATO members, or, for example, between the Republic of Serbia and China, within the Serbian-Chinese extensive cooperation. Even though this EDT does not show a disturbing potential in the WB at the moment, a prudent and proactive approach to the existing or future arms control regimes, should take it into consideration.

When it comes to the small satellite technology, it should be pointed out that countries that do not have indigenous capacities often reach out to private sector actors, in order to acquire certain data. The current situation with a development of small satellites, that is, space programs, in the area of the Western Balkans, is especially interesting in the cases of the Republic of Croatia and the Republic of Serbia. General public is probably not familiar with the fact that the Committee for Space Programme Development, from the city of Novi Sad, actively operates and intensively cooperates with foreign partners and, among other things, participates in the Indian “75 Satellites” program. According to the words of the Committee director, the partnership with Indian colleagues is at strategic level (RTV 2022). As an NGO, the Committee is ready for a strategic partnership with the state, but that, along with the first Serbian-made satellite, are yet to come. In the Republic of Croatia, small satellite planning is set as a national *Perun* project, with experts from the Adriatic Aerospace Association at the helm, and broader academia and STEM (Science, Technology, Engineering and Mathematics) students participating as well. Development and application of the satellite technology has an exceptional potential in improving intelligence capacities and data collection in general. Bearing

in mind the importance of data collection, and on-time information distribution for the flow of modern warfare, especially when it comes to special operations, or various asymmetric conflicts, it is clear that the satellite technology can greatly aid in accumulating advantage over an adversary. In practice, the satellite technology can have a destabilizing and, interestingly, a stabilizing potential as well. Namely, if a country A launches a satellite for military purposes, country B can react with an increased development and launch of its own satellite, or with a development or acquisition of anti-satellite weapon (which could further act as a trigger for arms race), maybe even with a preemptive strike against the country's A capacities (more on military perspective of ASAT you can find in Stojanović 2021, 441-442). On the other hand, if both states should possess the satellite technology, that fact combined with mutual perceptions of each state intentions, could have a stabilizing effect, even making arms control regimes if not unnecessary, then less needed, at least. This is because, when states are able to achieve optimal transparency using their own capacities, that is, to identify violations of the previously agreed behaviours, without additional information provided by the other side, then agreements without verifications can be possible, meaning that the ability of unilateral monitoring and data collection, even classified¹¹, could be conducted without an arms control agreement (Vaynman 2021).

In 2011, the US Department of Defence defined cyberspace as one of the operational domains, aligning it with the previously defined domains of warfare — land, sea, air and space. There are several specific features in connection to cyberspace and cybercrime, important to point out. So, besides the mentioned hardships to include cyberspace and malicious cyber operations in an arms control regime, it should be stated in the beginning that notions/terms such as cyberwarfare, cyberattack, cyberspace and other, are not precisely defined, nor generally accepted at an international level. Methods through which malicious cyber operations can be conducted are almost limitless, because they actually represent lines of code. Actors who conduct such activities, state or non-state, or those sponsored by foreign states, are, usually, hard to identify and follow, which allows states to either deny involvement in any way, or to fake the source of the attack and thus involve a third, innocent state, or other actors. Deeming the previous, we can conclude that conduction of malicious cyber operations allows actors of significantly lower strength to attack significantly stronger adversaries, inflicting a significant damage on the occasion, for example, by targeting critical infrastructure, and likely to stay hidden on the occasion, or divert doubt to a third

¹¹ For example, data collection using the satellite technology above foreign military bases.

party. Weak, general legal framework at an international level also goes in favour of evading accountability for malicious consequences that can be enormous, indeed. In other words, the synergic relationship between the perpetrator's sources invested, many times bigger potential or inflicted damage, as well as the significant possibility to evade responsibility, motivates all types of actors to develop and constantly conduct such activities.

The most significant strategic documents of the Western Balkans states, such as National Security Strategy of Montenegro from 2018, Guidelines for a Strategic Cybersecurity Framework in Bosnia and Herzegovina from 2019 and others, recognize cybercrime as one of the most dangerous national security threats, which, among other things, suggest that countries and security systems agree that it really is a serious threat, potent to disrupt stability, security and balance of forces. However, it is very difficult to attain a real impression on the Western Balkans states' capacities for cyberwarfare¹² because, given the aforementioned reasons, the states are not eager to make those capacities transparent, for well equipped, trained, motivated and instructed cyberwarfare groups represent real aces in states' arsenals of powers. Therefore, it does not come as a surprise that there have been no confirmed cyberattacks in the area of Western Balkans that include any state party as a perpetrator, or actors supported by any of the state parties.

Malicious cyber operations do have an enormous potential to disrupt stability and security, as well as to disrupt the balance of forces in the Western Balkans region. Having in mind the aforementioned characteristics, we can argue that this EDT precisely, at this moment, probably has the largest potential of all the mentioned ones, to disrupt the balance of forces in the Western Balkans, because critical infrastructures of the countries in the region are exposed to these activities.

Conclusion

The complex security environment in the Western Balkan area, with all its stabilizing and destabilizing factors, affects the shaping of a broader political-security context where the emerging and disruptive technologies are appearing and developing and can significantly mould the way of their practical use. As pointed in this paper, provisions of the Sub-Regional Arms Control Agreement are

¹² Cyberwarfare capacities of the NATO member states should be perceived in connection to that fact as well, because, depending on a political context, it can be a cause for sharing and transferring of technology, or highly trained specialists.

being effectively implemented, so it is right to conclude that the Agreement still represents a factor of stability, when it comes to conventional arms and warfare. One of the factor that contributed to that fact is its flexibility. Furthermore, through comparative analysis of the Western Balkans states EDTs capacities, we can conclude that these capacities are being developed, but do not have a potential to disrupt the balance of forces set by the Florence Agreement at this moment.

However, that does not mean that the answer to the research question — do we need a new arms control regime — is negative, on contrary. A responsible approach to increase of stability, trust and transparency between the Western Balkans countries should include, at the very least, updating the existing agreement and, more optimistically, drafting additional ones. Update of the existing agreement should be carried out so that new provisions are fitting the nature of the present EDTs, as well as their applications in the area of military armament and gear, meaning the provisions could apply to the so-called asymmetric conflicts, not just the traditional warfare. In that sense, for example, the existing Agreement could be extended with numerical limitations on operational, armed unmanned aerial vehicles that state parties are allowed to possess, excluding those scouting and reconnaissance, and those of clearly civilian/commercial purpose. On the other hand, considering probably the largest disruptive potential of the malicious activities conducted in cyberspace, it would be prudent to create exceptional confidence and security building measures for this domain that would rest on the so-called behavioural criteria, in terms of banning certain malicious behaviour, for example, conducting cyber operations that target civilian critical infrastructure. One of the first actions to be undertaken in order to build confidence and security, may regard to increasing transparency of new armament and gear procurements, especially of the EDTs that can raise doubts due to their nature. In that sense, it would be responsible to create a regional EDTs Code of Conduct.

It is obvious that the operationalization of the current and/or drafting new arms control instruments would require real political will that would, in addition to a sincere desire for cooperation, include practical speed of negotiations. In connection to that, the current cooperation mechanisms, set by the Florence Agreement could be used for this kind of communication as well. Moreover, it would be very responsible and in accordance with transparency and confidence build-up, to establish expert groups at national levels that would continuously follow development and applications of the EDTs in the world and the region, and communicate in terms of information and experience exchange, with the Florence Agreement established cooperation mechanisms seeming appropriate. In addition, at the Western Balkans level, a joint centre could be established, as a base to converge information from national levels.

The centre could operate as a generator of suggestions regarding future arms control regimes, with responsible, ethical use of the emerging and disruptive technologies.

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**NOVE I OMETAJUĆE TEHNOLOGIJE NA ZAPADNOM BALKANU:
DA LI NAM JE POTREBAN REŽIM KONTROLE NAORUŽANJA?**

Apstrakt: Predmet ovog rada je istraživanje odnosa između novih i ometajućih tehnologija (EDT) i podregionalnog režima kontrole naoružanja na Zapadnom Balkanu, uspostavljenog Sporazumom o podregionalnoj kontroli naoružanja koji je potpisan 14. juna 1996. u Firenci. Da li EDT koje zemlje Zapadnog Balkana poseduju ili planiraju da steknu utiču na postojeću jednačinu kontrole naoružanja na ovom prostoru i, ako da, da li nam je potreban novi režim kontrole naoružanja? Autori istražuju ovo pitanje kroz analizu novih i ometajućih tehnologija koje su se ukorenile u državama stranam Sporazuma i verovatno će postati značajne u budućnosti, i režima podregionalne kontrole naoružanja, uzimajući EDT kao jednu od varijabli koja dovodi u pitanje postojeći režim kontrole naoružanja. Oni upoređuju trenutne EDT kapacitete koje poseduju države Zapadnog Balkana, kao i potencijal tih tehnologija da naruše ravnotežu snaga utvrđenu Sporazumom. Autori zaključuju da, iako nam nije potreban potpuno novi sporazum o kontroli naoružanja na Zapadnom Balkanu, odgovoran pristup bi uključivao ažuriranje postojećeg režima kontrole naoružanja, posebno u pogledu novih mera za izgradnju poverenja i bezbednost i povećanu transparentnost po pitanju nabavki i prirode potencijalne upotrebe novih i ometajućih tehnologija.

Ključne reči: nove tehnologije, ometajuće tehnologije, kontrola naoružanja, podregionalna kontrola naoružanja, Zapadni Balkan.

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EU-Sub-Saharan Africa relations: The history of (un)equal partnership

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Abstract: This paper explores some exploitative economic tendencies in Africa-EU relations, tracking them from the Treaty of Rome, continuously through Yaounde, Lome and Cotonou initiatives. As time passes, the exploitative aspect of this relationship is getting vaguer through vocabulary changes and more subtle economic mechanisms. Each new cooperation framework tried to emphasize the importance of equality in the EU-Africa partnership but the inequality between the two parties constantly grew. This is the case with the newest, Global gateway framework. This investment plan is an *ad-hoc* initiative designed to counter Chinese interests in the region. The EU tends to be a norm creator in the African continent. The paper reexamines the capability of the EU to fulfill that role.

Keywords: Africa, EU, Global gateway, equal partnership Yaounde, Lome, Cotonou.

Introduction

The paper presents an overview of the relationship between Africa and the European Union from the viewpoint of postcolonial theory. The entire history of Africa – EU relations is being reexamined using a “postcolonial theory lens”, from the Treaty of Rome to the newest cooperation-investment framework called Global

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gateway. In this latest framework, the EU is emphasizing its role as a norm creator and role model to follow. Consequently, the ability of the EU to be a norm creator in Africa is being reexamined as well. The hypothesis of the paper is that the entire relationship between the EU and African countries is modeled in a neo-colonial fashion with the goal to preserve long-established exploitative and/or asymmetrical mechanisms. The latest Global gateway framework is at least partially exempted from neocolonial tendencies. However, its purpose is not to mend EU-Africa relations but rather to counter Chinese investments in the region.

Authors such as Haastrup, Raimundo, and Grilli are mostly critical of the EU's role in Africa, while Twitchett and Lister have more positive viewpoints. It is noteworthy that newer sources of literature are more critical of the role of the European Union than older ones. This can testify to the increasing importance of postcolonial criticism and the weakening of "imperialist restraints" in the scientific discourse.

Theoretical framework

The theoretical framework of EU-Sub-Saharan relations can be perceived from the point of view of several different international relations (IR) theories: realism, liberalism, constructivism, and the postcolonial approach.

Many realist authors believe that the structural disparities between the EU and Africa are defined by the "nature of the state". Precisely, the coloniality² of the imperial structures in postcolonial Africa illustrates the absence of the state in the European notion (Bates, 1981; Englebert and Dunn, 2013). In essence, "if IR theory, as the realists say, is dependent on the Eurocentric statist framework, the existence of distinct 'Afrocentric states' invalidates its universal assumptions" (Faleye 2021, 17). Therefore, the African experience demonstrates the existence of different types of states in diverse histories of the world. This unveils "the futility of absolute values", in the development concepts and knowledge systems (Ibid).

As noted by Walter Rodney in his famous book *The development of underdevelopment* "colonialism in Africa left the continent without the tools, skills and political capital required to mobilize its resources for developmental purposes" (Rodney 1972, 163). Consequently, as Faleye puts it, "the continent has been

² Coloniality represents long-standing patterns of power that occurred after colonialism. These designs further define knowledge production, culture, labor, and inter-subjective relations (Shange 2021). Moreover, "coloniality refers to the organization and systemic distribution of power through the control of access to knowledge, moral and artistic resources by the dominant group" (Townsin 2016)

perpetuated into a state of underdevelopment” in a world controlled by the imperialistic structures of the collective West (Faleye 2021, 18).

Realists demonstrate the EU’s “divide and rule” strategy in the making of the Cotonou Agreement of 2000. The Cotonou Agreement led to the partitioning of the African, Caribbean, and Pacific (ACP) states into regional developmental areas (Holland, 2003; Babarinde and Faber, 2005).

Liberals perceive regional integration in Europe as a necessity to promote peace, security, and progress. In this respect, mirroring the European regional scheme to Africa symbolizes the EU’s commitment to promoting its interest in Africa through soft power diplomacy based on the principle of peaceful coexistence of nations through mutual cooperation. These supranational organizations such as the ECOWAS, COMESA, and the African Union (AU) are supposed to defuse aggressive tendencies in the international system (Faleye 2021, 18). However, the implantation of liberal democracy in Africa has not delivered the promised development in the region. In fact, the democratic transition that happened in Africa through electoral malpractices legitimizes the state in the interest of the political elites. Moreover, liberal democracy catalyzed unequal development, ruthless power struggle, and marginalization of the majority of Africans by a few privileged ones. Famous Nigerian musician Fela Kuti, gave African democracy an infamous nickname, calling it “demo-crazy” (Ibid,18). African political system operates via patronage and clientelism. Vainly copying the European political system, this neo-patrimonial rentier order is based on the privatization and appropriation of state resources despite proclaiming the ideas of liberal democracy (Ibid).

Constructivists believe that society is the product of the people, showcase how social interactions determine state behavior via interaction of people and societal norms. Faleye points out that “the operationalization of social norms constitutes societal practices, and that the engagement of individuals and groups with such practices defines their level of agency³ in societal transformation” (Ibid,19). Thus, as Kubalkova points out, “social norms represent the agents’ practices which emanate from their agenda, that creates the pathway for the emergence of institutions” (Kubáľková et al., 1998). Faleye sums up by saying that the constructivists see anarchy as an international structure governed by dynamic social norms which are constructed historically in the global space (Faleye 2021,19). However, contrary to the realist and liberal schools of thought, constructivism

³ According to Ashcroft, Griffiths and Tiffin “agency refers to the ability to act or perform an action. It answers the question if individuals can freely and autonomously initiate action, or whether the things they do are determined by the ways in which their identity has been constructed” (Ashcroft, Griffiths, Tiffin 2007, 6).

provides some answers to the inherent challenges in IR theory regarding the African experience (Price and Reus-Smit, 1998, 266). Rosenberg tries to redefine IR, by arguing that the word “international” (in IR) refers to multiple forms of human experience. Considering the world’s pluralistic character, Rosenberg redefines the IR concept to summarize the socio-economic and political relations among structured human groups. Thus, in explaining EU- Africa relations, it is necessary to use a holistic framework that underlines the normative structures at local and international levels. According to the constructivist framework, social relations are based on “the historical experience and its attendant symbolic codes” thus creating the logical foundation for comprehending the dynamic transition of the state’s identity as a result of the convergence of internal and external factors. (Rosenberg 2016, 21; Faleye 2021, 20).

The pattern of EU- Africa relations is based on mutual perception. Constructivism deconstructed the idea of monolithic Africa and the colonial blocs. Earlier, African identity was perceived as unitary. Moreover, in the era of European imperialism, there was a tendency to harmonize the distinctive precolonial African nations along francophone and anglophone identities. This phenomenon, was evident in the French policy of assimilation and the contrasting British system of indirect rule (Faleye 2021, 21).

In order to rectify the asymmetries between African and European countries, it is necessary to apply a post-colonial approach(es). Postcolonial approaches seek to deconstruct Eurocentric perceptions through postcolonial theory and perspective. Consequently, in the context of Africa- EU relations, postcolonial approaches are used to “demystify and demythologize⁴ African agency” (Rutazibwa, 2014, 296; Sebhatu 2021, 38). Postcolonial approaches present a radical intellectual practice that challenges the dominant ways of producing knowledge about developing countries (Chandra 2013, 491).

Before explaining terms such as postcolonial and postcoloniality, the term coloniality must be explained. Coloniality refers to “the deep structures that not only justify colonialism in the eyes of the colonizer, but also produce the hierarchies that made modernity possible” (Maldonado- Torres, 2007, cited in Capan, 2016, 3). In other words, coloniality and modernity are interconnected. Coloniality is constitutive of modernity and the two should not be perceived separately. Both are legitimized through Eurocentrism. Eurocentrism can be defined as “the

⁴ To demythologize means to “reframe and add to existing mainstream arguments so as to rectify Eurocentric bias in mainstream knowledge production on Africa- EU relations”. By interrogating myths, “scholars are in a better position to develop “more grounded theories” – theories that cannot be easily debunked or provincialized as is the case with Eurocentric studies” (Sebhatu 2021, 38-39).

sensibility that Europe is historically, economically, culturally and politically distinctive in ways that significantly determine the overall character of world politics” (Sabaratnam, 2013, 261). Coloniality is made “through” the process of othering – Africa is Europe’s Other. Othering is sustained mainly through culturalist Eurocentrism. It creates discourses that position Africa as underdeveloped, weak, etc. while Europe is modern, developed, strong, etc. (Sebhatu 2021, 44-45).

The term “postcolonial” is used “to define the situation of formally colonized countries and peoples, including their place in the global political economy”. Postcoloniality refers to “transcending an imperialist past not just coming after” (De Alva, 1995, cited in Fisher Onar and Nicolaidis, 2013, 293–294). Young would say that “postcolonialism does not preserve the memory of colonialism, but it preserves the memory of the triumph over it” (Young 2001, 60). The “post” in “postcolonial” is used to describe the situation in African countries after their political decolonization from Western Europe colonization. However, there is a strong sense that colonial structures still exist in present-day Africa. Postcolonial theory is therefore a critical theory that acknowledges colonial legacies. It provides approaches and analytical tools for studying coloniality in contemporary times. Postcolonial approaches have an understanding of colonial legacies which enables them to provide the foundation for knowledge production that hinders the reproduction of coloniality through Eurocentrism. Postcolonial theories and approaches to the study of Africa- EU relations allow a deeper understanding of the dynamics of Africa-EU relations from a historical and global perspective. It represents an alternative to mainstream analysis of the impact of colonialism as historical, which omits its link with modernity (Sebhatu 2021, 39-40). Power asymmetry, mentioned above among African states and the EU is the dominant discourse in the studies on Africa- EU relations. Sebhatu points out that the postcolonial approach to asymmetry discourse should not be concerned with arguing against the fact that economic disparities between Africa and Europe truly exist. The postcolonial approach needs to focus on contextualizing why and how such disparities exist in the first place, and what is their cause. Moreover, a postcolonial approach needs to recognize the epistemic violence behind this discourse, including a historical perspective, and how such an epistemology silences African agency (Ibid, 45).

According to the postcolonialists, contemporary Africa-EU relations are covered with complexity and “primordial sin”. During colonization, the economies of African countries were structured to meet the needs of Europeans, not Africans. The best example to illustrate this is the shape of state borders in Africa. African borders are tailored to fulfill European needs. As a consequence of this process, fourteen countries in Sub-Saharan Africa are landlocked or enclaves. Enclave status

significantly complicates terms of trade, since the enclave-state is forced to use the infrastructure of neighboring states in order to access the sea. This is problematic for two reasons. Firstly, almost no Sub-Saharan country possesses a completely politically stable environment. Secondly, the infrastructure in Africa is underdeveloped and as a result, the distance from the sea or river port is a much bigger obstacle than it is in Europe. Apart from trade and overall economic development, such borders have also disrupted the ethnic balance in Sub-Saharan Africa. For instance, such a border can separate a single ethnic group, or it can forcefully unite two or more ethnic groups that have never lived together until European colonization. Furthermore, in the worst-case scenario, it can unite (in one state) several ethnic groups that have been in conflict throughout their (pre-colonial) history (Babić 2022, 46-47).

Sebhantu claims that the very constitution of the EU is a product of colonial legacy: “The central objective of Europe’s integration – the Treaty of Rome and the establishment of the European Economic Community (EEC – today’s EU) in 1957 – was dictated through a collective agreement among European countries that they needed Africa (as commodity base) in order to restore Europe’s productive power in the aftermath of World War II” (Sebhantu 2021, 42). After former African colonies regained their independence the term Eurafrica appears repeatedly throughout EEC discourse on European integration until the mid-1960s, then it gets replaced with terms such as development, aid, and diplomatic counseling to the undeveloped regions (Hansen and Jonsson, 2018, 40, 44).

Fisher Onar and Nicolaidis note mentioning and then disappearing of Africa in the very construction of a European community, which they say is a symbol of the historical amnesia that depicts Africa’s underdevelopment from an ahistorical perspective. This historical amnesia is an example of how the EU imagines itself as a global actor and power – “by forgetting its colonial past and successfully entrenching the myth of its own ‘virgin birth’” (Fisher Onar; Nicolaidis 2013, 292). Rutazibawa and Sabaratnam claim that the myth of the EU’s “virgin birth” and its path toward modernity cannot and should not be understood as being separate from its colonial past. Moreover, they say that European countries generated wealth, industrialization, and development through the exploitation of the resources and people of their former colonies (Sabaratnam, 2011, 787– 788, Rutazibawa cited in Sebhantu 2021, 43). This is the reason why the postcolonial approach is necessary when discussing Europe’s power and self-imaginary present – to deconstruct this fundamental historical myth of European development and innocence. From the former statements of Sebhantu, Rutazibawa, and Sabaratnam it can be concluded that the discourse in which Europe was technologically advanced and economically developed through the building of institutions, and

that it originates from enlightened and universalist ethical and political thought was a smoke screen intended to cover up massive exploitation of natural resources and free human labor in its colonies. The fact that one of the motives for creating the European Community was the desire to collectively manage a colonial world that must be part of the deconstructive agenda that postcolonial approaches ultimately strive for (Fisher Onar and Nicolaidis, 2013, 293; Sebhatu 2021, 43).

An overview of an unequal partnership

The Treaty of Rome era (1957-1963)

The history of Africa-EU relations starts with the Treaty of Rome itself. The Rome Treaty enabled a link between the EEC and the colonies and overseas territories of Belgium, Italy, France, and the Netherlands, with the purpose of “promoting the economic and social development of these territories, and establishing close economic relations between them and the EEC as a whole”. Raimundo says that this integration system was based on three main elements: trade, financial aid,⁵ and formal relations. Reciprocal trade preferences guaranteed by this agreement enabled the continuation of privileged access which was existing between metropolises and colonies (Raimundo 2022, 60).

France requested that its colonies and territories have “special consideration” Paris wanted to prevent the creation of the EEC as a customs union which would affect its colonial trade arrangements.⁶ It also hoped to share the burden of its aid, in order to counter separatist and pro-communist impulses in Africa (Ibid). This has led to the Convention of the Association of Overseas Territories (OCTs). This consideration of the OCTs in the Treaty of Rome was based on an agreement among the European signatories, thus, non-European states had not been

⁵ Aid was allocated through the specifically established European Development Fund (EDF), with contributions from all Six member states and administered by the European Commission. Even if relatively small, EDF was disbursed in the form of grants and supplemented the bilateral aid from the EEC countries (Raimundo 2022, 60).

⁶ The other member states were reluctant to follow France’s plans. Strong opposition came from West Germany and the Netherlands, which had a more open and globalist outlook while at the same time being fearful of neocolonial accusations and unwilling to shoulder the costs of joint aid. Faced with France’s firm insistence, these objections were ultimately overridden by the priority given to European reconciliation and reconstruction, as well as through some concessions (Raimundo 2022, 60).

consulted. The EEC member states had agreed on mutual integration, and to assist the OCTs and decolonized nations with technical and financial support from the European Development Fund (EDF). This support had two goals: according to Haastrup, the first goal was to help the former colonies to develop social, political, and economic infrastructure. The second goal was to give “European countries continued, and consistent, access to their former colonies”. Assistance was focused on the francophone countries. In 1956 the French government wanted to preserve its links with its former colonies within the framework of the EEC. Thus, the framework in which the colonial donor-recipient paradigm continued to function in a post-colonial environment. It can be concluded, that “from the very beginning EU–Africa relations were at the very least, morally problematic, plagued with accusations of neo-colonialism – a label that still resonates today” (Haastrup 2013, 8-9). By including association with African countries in the Treaty of Rome, all the member states of the EEC had equal economic and exploitation access to the African francophone countries. This highlights the colonial origin of modern European cooperation and institutionalization (Ibid, 9).

Yaounde era (1963–1975)

The wave of decolonization swept across Africa in the early 1960s and created a need to rethink the nature of the association. The first agreement or convention, Yaoundé I, was signed in 1963. Yaoundé Convention of Association was signed between the EEC and a group of 18 countries, essentially former French colonies in Africa, known as the Associated African and Malagasy States (AAMS). This move coincided with a period marked by increased attempts at foreign policy cooperation among Western European countries, partly spurred by the ambiguous French Gaullist vision of Europe as a ‘third way’, independent of the superpowers (Raimundo 2022, 61). This agreement still focused on former francophone colonies. It preserved preferential trade relations between metropolises and their former colonies. The convention was particularly favorable to France.⁷ It guaranteed France access to raw materials from Africa (Haastrup 2013, 9). However, instead of forming a wide Eurafrikan trading area (which was the case with the Rome Treaty), Yaoundé enabled bilateral free trade areas between the EEC and each of the associated

⁷ Since neither Britain nor Portugal were initial members of the EEC, there was no advocate for the inclusion of the anglophone nor lusophone African countries. Former British colonies complained that Yaoundé I was intended for the former French colonies, giving them “premium access” to European markets. Thus, Yaoundé I appeared to preserve the French colonial system in Africa (Haastrup 2013, 10).

countries. Moreover, the involved parties were free to organize their commercial relations, both with each other and with third countries. These changes partly reflected the new independent status of African countries. On the other hand, it was an attempt as Grili says: “to make Yaoundé conform more with GATT rules and an answer to the criticisms of neocolonialism and divisiveness leveled in particular by some African Commonwealth countries” (Grilli, 1993, 19–20 cited in Raimundo 2022, 61–62).

Modernization theory ideas inspired the Yaoundé system. Market-centered policies of development formed the crux of the convention (Holland and Doidge, 2012, 23–24). Unlike the Rome Treaty arrangements, Yaoundé was freely negotiated and ratified by all parties (not just European ones). This novelty did not prevent EEC member states from controlling the negotiations. Even so, during the discussions, the African countries tried to exert some pressure by appealing to the honor and moral integrity of the Europeans. To facilitate the processes of negotiation and implementation of the agreement, joint institutions were created in which the two sides were represented on an equal basis. Again, this had its important limits, because institutional structure mirrored that of the EEC, and decision-making power rested mainly with the European side. Yet, Twitchett believes it was “simultaneously, a symbol of parity between the two parties as well as a useful framework to promote dialogue and mutual awareness” (Twitchett, 1978: 109–113, 139–140). However, it could rather be defined as the attempt of equalizing the unequal.

The successor of Yaoundé I was Yaoundé II, which came into force in 1971. This agreement was not significantly different from the previous one. Yaoundé II incorporated the Arusha agreements⁸, thereby including some former British colonies. The incorporation of former British colonies happened because of earlier criticisms that ECC Africa relations “were a reflection of French-driven neo-colonialism” (Haastrup 2013, 10). Both agreements ended and constituted the basis for the broader Lomé Convention of 1975.

In conclusion, despite the signs of greater openness and less exclusiveness, Yaoundé remained narrowly focused on francophone Africa and tried to strengthen the link between Africa and Europe (the West), not among African countries or other countries of the developing world (Lister, 1988, 45). Simultaneously, such asymmetry rooted in colonial legacies was not immune to paternalism (mainly French). Despite the efforts to achieve greater parity, Yaoundé inaugurated a pattern of interactions based on a clientelist paradigm (Raimundo 2022, 62).

⁸ Arusha Declaration is known as most prominent political statement of African Socialism.

Lome era (1975-2000)

The first EEC enlargement in 1973 opened the door to a reformulation of the Europe-Africa relationship. Britain wanted to protect its Commonwealth ties, which went well beyond the African continent. EEC countries such as the Netherlands and West Germany used the prospect of British membership as an opportunity to press for a more open and broader system than Yaoundé (Raimundo 2022, 62). Despite the formalization of the ACP group⁹, there was no real change in the dynamics of North-South relations regarding Europe and the rest. On the contrary, the pattern of engagement that had always existed got reinforced even more. In fact, it worsened Africa-EU relations by institutionalizing the prevailing colonial paradigm. It also created a platform for mutual relations that is still active today (Haastrup 2013, 12). Lister defines the Lome framework as politically discreet rather than neutral, as it sought to distance itself from colonialism and superpower rivalries, supposedly claiming the “middle way” while being closer to the United States (Lister, 1988, 189–192).

Lomé I was the first agreement signed in EEC–ACP format. The agreement was signed in 1975 and came into force in 1976. It continued preferential trade between the EEC and ACP countries and guaranteed non-reciprocal trade concessions to ACP member countries, by allowing 90% of their exports into the Communities duty-free. The agreement retained “the contractual nature of aid”, although it was more detailed and precise, focusing also on the growth of agricultural infrastructure as well (Goutier, 2008, 8). The overall perception of Lomé I was the object of a lively debate. More positive perspectives are those of Gruhn who looked at it “as an important step away from colonialism towards increased interdependence” (Gruhn, 1976). More critical viewpoints, such as Galtung’s emphasized the continuities with past, colonial patterns of engagement, describing Lomé as a neocolonial device (Galtung, 1976). Ravenhill describes it as a form of “collective clientelism” (Ravenhill, 1985, 22).

Lomé II was introduced five years later. The cooperation between the ACP and EEC countries had two additions. Firstly, the ACP membership was expanded. Secondly, the System of Stabilization of Export Earnings from Mining Products was added to the agreement. This mechanism was designed to assist the ACP countries

⁹ ACP group of countries was created by the Georgetown Agreement in 1975. It consists of African, Caribbean and Pacific States. Currently known as the Organization of African, Caribbean and Pacific States (OACPS).

in upgrading their own mineral production capabilities (Babarinde and Faber, 2005, 4; Haastrup 2013, 12).

Lomé III came into force in 1985. It retained all the downsides of the previous agreements. The EC maintained its privileged position with the ACP countries, most of which were dependent on external aid. However, the situation was also exacerbated by the weak governance systems in post-colonial Africa (Haastrup 2013, 12-13). Goutier notes that Lomé III reflected “aid fatigue” on the part of the donor nations. European countries felt they were not getting the positive returns expected from the agreements with the ACP countries, such as social, economic, and political development. On the contrary, poverty was at its highest rate since independence, and many countries were governed by military regimes or other kinds of dictatorships (Goutier 2008 cited in Haastrup 2013, 13). Haastrup notes that what set Lomé III apart from previous agreements were the “policy dialogues”. In 1985 it was obvious that “high politics” goes parallel with social and economic development. African states viewed political issues in their relations with Europe as an imposition of conditions for aid. Haastrup provides an example:

“During negotiations, the ACP countries took issue with the phrase in the Lomé III agreement which introduced a commitment on their part to the preservation of ‘human dignity’. This reference to human dignity was to emphasize the importance of observing human rights in the function of trade, aid, and development, which clearly veers in the direction of a political concern rather than economic cooperation. Nevertheless, the ACP countries accepted the changes in writing” (Haastrup 2013, 13-14).

This shows the existing pattern of the Africa-Europe relationship rather than change. It shows the imposition of values wrapped in economic aid which actually makes African countries more dependent.

In 1990 Lomé IV was signed. In this agreement, the EC (later EU) stipulated stricter controls on the use of funds. Additionally, the European Commission increased the period of validity for each agreement from the usual five years to ten years. The idea was to provide “better continuity of development programs” (Goutier, 2008, 9 cited in Haastrup 2013, 14). But it also testifies to their (in)efficiency having in mind the timeframe lengthening.

Unlike its predecessors, Lomé IV was signed for ten years, with a mid-term review after five years. This extended duration should have provided extra stability, but it was also indicative of a certain “Lomé fatigue”. For the first time, explicit economic and political conditions were introduced in the document. A significant proportion of EDF aid was directed towards structural adjustment support, which led to a reduction of funds targeting long-term development. Moreover, Lomé IV

included a human rights clause stipulating that development “entails respect for and promotion of all human rights”. In a practical sense, several African countries were suspended from aid programs for political reasons, a move condemned by the ACP countries (Brown, 2002, 73–114; Lister, 1997: 108–131). The Lomé IV mid-term review expanded political conditionality and EU control over aid resources. Respect for human rights, democratic principles, and the rule of law were made ‘essential elements, and a “suspension clause” was inserted, stating expressly that non-observance of these conditions could lead to sanctions. Apart from that, EU development objectives were explicitly included in the convention, hence increasing the European influence over Lomé’s policies. Furthermore, the mid-term revision introduced phased programming that allocated funds in two tranches, with the second one subject to a successful review of progress. This more flexible and performance-based system was criticized by the ACP countries for reinforcing the possibility of conditionalities and undermining Lomé’s founding principles (Raimundo 2022, 64). Lomé IV became the tool for imposing EU values and not the instrument of assistance to the ACP countries.

Raimundo believes that the “evolution of the Lomé framework represents a gradual shift from an emphasis on equality, solidarity, and neutrality to a greater accent on European objectives, efficiency, and conditionality” (Ibid, 64–65). The sentiment in Africa-EU relations shifted towards less generous, more conditional, and politicized terms. This meant that the initial rhetoric of an equal partnership and a new model for North-South cooperation lost further ground (Ibid). It can be concluded that openness and equality were referring to European countries. The intention was to give more access to Africa to the new EC/EU member states, foremost the UK.

Cotonou era (2000-2020)

The expiration of the Lomé Convention created an opportunity for reshaping of Africa-EU arrangements. Although the desire for reform was widely shared, the ACP side was less keen than the EU in general. Reflecting their own weaknesses, the ACP countries were mainly interested in preserving the benefits of Lomé and their identity as a group. The preservation of trade preferences for the ACP countries was perceived as a main benefit for the ACP countries. Among Europeans, the main divide was initially visible between those who wanted to retain special ties and those who instead wished to “normalize” relations with their developing counterparts (Carbone, 2013, 744).

The first Cotonou Agreement signed in 2000, was a continuation, a move away from the previous agreements, and an attempt at re-evaluation. Cotonou was signed

for a 20-year period, with a review every five years. Its main stated goals were “reducing and eventually eradicating poverty consistent with the objectives of sustainable development and the gradual integration of the ACP countries into the world economy” (Holland and Doidge, 2012, 26–27, 71). European Development Fund financed the Cotonou Agreement. The new terms of EU–ACP relations remained very explicit about the political nature of development assistance in the 21st century (Haastrup 2013, 15). Cotonou reinforced the political dimension of the EU-ACP relationship. Political dialogue became a more important feature and was turned into the third pillar of cooperation, alongside the traditional aid and trade dimensions. Although the idea of partnership was emphasized, political conditionality continued and was expanded to new levels. During the negotiations, the EU had tried to include good governance as another “essential element” for reviewing Africa, good governance was added implying that “serious cases of corruption” could lead to sanctions as a “measure of last resort”. Simultaneously, the revision procedure was strengthened, including the possibility of external arbitration (Bretherton and Vogler, 2006, 122). But, what Western policy-makers somehow always forget is the fact that “corruption has two ends” and that African officials are just on the receiving end of it. The big question is who is corrupting African officials, and with what money. Money used for corruption does not come to Africa *ex nihilo*, it comes from various multinational companies, aid agencies, development funds, etc. whose CEOs, chairmen, and boards of directors are sworn to honor transparency, good governance, and strict ethical norms.

This Cotonou agreement reflected the slow but steady erosion of the old arrangements. Carbone states that Cotonou Agreement represented a “fundamental break” with the past. While preserving the partnership model and the twin pillars of aid and trade, it promoted a new type of cooperation combining trade liberalization and “politicization”. This notion of linking different dimensions was a novelty at the time, making Cotonou a ‘unique agreement’ just like the Lomé Convention had been at its time (Carbone 2017: 300–301). The Cotonou Agreement created a new norm – security (Haastrup 2013, 18). The first review of Cotonou in 2005 introduced security amendments to the political pillar. Reflecting the post-9/11 context and the EU’s global ambitions, the revised agreement gave a new emphasis to security aspects. New clauses were included on terrorism, mercenary activities, the International Criminal Court (ICC), and weapons of mass destruction (Raimundo 2022, 66). Moreover, in contrast to the essentially G2G approach favored by the Lomé convention, Cotonou gave a new emphasis to the involvement of non-state actors (NGOs). This innovation was viewed by EU representatives as important in building democracy within ACP states but was resented by ACP governments which considered it as interference. Regarding development aid, the Cotonou agreement

expressed commitment to the United Nations Millennium Development Goals by introducing more flexibility into the aid disbursement process (Ibid).

The second review of Cotonou in 2010 emphasized issues such as regional integration, climate change, state fragility, and aid effectiveness. In the context of regionalism, African Union was recognized as a key interlocutor in peace and security matters. Moreover, according to Raimundo the second review was “seeking to put political dialogue on a more equal footing, the review stipulated that ‘the principles underlying essential and fundamental elements’ should apply equally to both the ACP and the EU. However, the two sides disagreed on aspects related to sexual discrimination, illegal migration, and the ICC” (Ibid, 66).

(Un)predictably the emphasis on (sub)regional dynamics and the emergence of parallel policy frameworks (such as the separate strategies for Africa, the Caribbean, and the Pacific) led to a gradual dissolution of the EU- ACP framework. As the trade and political pillars of Cotonou were regionalized, EU- ACP cooperation was de facto reduced to a mostly development tool. Thus, slowly the Cotonou Agreement lost momentum and was not able to revitalize the EU-ACP relationship (Bossuyt et al., 2016).

Joint Africa- EU Strategy (JAES)

Even during the Cotonou agreement, the EU had a back-up plan. The Joint Africa-EU Strategy (JAES) was formally adopted at the Lisbon Summit in 2007 by representatives of 53 African and 27 European states. The JAES was perceived as a long-term continent-to-continent strategy that seeks to define a partnership of equals through which consensus on priorities is jointly identified (Kell, Vines 2021, 105). The language used in the Lisbon Declaration and in the original JAES document highlighted a desire to overcome the traditional donor-recipient relationship that dominated previous decades and replace it with a “partnership of equals” built on jointly identified values and goals (Ibid, 107).

The priorities of the JAES at its inception were codified under four Strategic Framework features:

- “• Peace and security: Promoting a safer world;
- Governance and human rights: Upholding our values and principles;
- Trade and regional integration: Raising potential and using opportunities; and
- Key development issues: Accelerating progress towards the MDGs (Kell, Vines 2021, 107)”.

In early 2016, the EU acknowledged that Cotonou had not been able to address the importance of the AU as a continental organization (European Commission, 2016, 6). Such indications were recognized formally in June 2018 with the release of the EU's post-Cotonou negotiating mandate, which called to adapt the relationship with the ACP by establishing an “umbrella” agreement of three regional partnerships with Africa, the Pacific, and the Caribbean, respectively (Kell, Vines 2021, 114).

Since old promises were bankrupt and unfulfilled it was time for a new “carrot”. In March 2020, the Commission released a joint communication: “Towards a Comprehensive Strategy with Africa” (European Commission, 2020). The document outlines five core partnerships for a new strategy: “green transition and energy access, digital transformation, sustainable growth and jobs, peace and governance, and migration and mobility” (Ibid.). The tone of the document was less paternalistic than usual EU rhetorics: avoiding the corny phrase of a “partnership of equals” and appealing to “respective interests”, not simply mutual ones. However, while pursuing a less overbearing approach in rhetoric, the document contains no discussion of the precise instruments and financing mechanisms by which the strategy could be implemented. Furthermore, just after the release of the documents, the road to implementing an agreement at the sixth AU–EU summit became “increasingly bumpy”: facing constant delays and revisions for a period of 2021–2027 EU due to the COVID-19 pandemic and Ukraine crisis (Kell, Vines 2021, 116).

The Gateway for the silk road

On 1st December 2021, the EU unveiled the Global Gateway, its plan to support infrastructure development around the world. Global Gateway aims to mobilize up to €300 billion in investments between 2021 and 2027. EU claims Global Gateway consists of the new financial tools in the EU multi-annual financial framework 2021–2027 (European Commission – Press release Brussels, 1 December 2021, 1). The fund has a new name – Neighborhood, Development and International Cooperation Instrument (NDICI). However, when the lump sum is closely examined it can be seen that this sum is composed of: “€135 billion in investment foreseen under the European Fund for Sustainable Development plus (EFSD+), where the EU provides €40 billion in guarantee capacity, of which €26.7 billion via EIB and €13 billion via an EFSD+. The new financial line is dedicated to Global Gateway targeting national financing and development finance institutions – €18 billion in grants under other EU external assistance programs. The sum of €145 billion is planned investments

by EU countries' financial and development finance institutions. Existing programs such as the Pre-Accession Assistance (IPA) III, Interreg, InvestEU, and Horizon Europe will also be used to mobilize resources under Global Gateway. The EU is also exploring the option of creating a European Export Credit Facility to complement existing credit arrangements by EU countries and increase its overall firepower in this area." (Tagliapietra 2021). Therefore, it can be concluded that it is not a new financial tool with "fresh" money inflow but rather a skillful combination of leftovers from already existing projects, despite the new name.

It is planned that Global Gateway projects would be implemented through Team Europe Initiatives. As stated in the EU Press release: "The EU institutions, Member States, and European financial institutions will work together with European businesses as well as governments, civil society, and the private sector in partner countries" (European Commission – Press release Brussels, 1 December 2021, 2). Global Gateway emphasizes an ethical approach in which infrastructure projects do not create unsustainable debt. The EU insists on high standards, good governance, and transparency, while implementing its projects The Global Gateway will offer its partners "a response to the urgent needs to develop sustainable and high-quality digital, climate and energy and transport infrastructures and strengthen health, education and research systems across the world, taking into account their needs and the EU's own interests" (ECQ&A 2021, 1).

European Commission identifies key pillars of the Global Gateway:

- Democratic values and standards

Global Gateway will offer a values-based option for partner countries to choose from when deciding how to meet their infrastructure development needs. This means adhering to the rule of law, upholding high standards of human, social, and workers' rights, and respecting norms from international rules to intellectual property and open public procurement. It means selecting investments that are sustainable – for local people, the local environment, and local economies. It means taking an ethical approach so that infrastructure projects do not create the unsustainable debt or unwanted dependencies (ECQ&A 2021, 2).

- Good Governance and Transparency

Delivering projects that work for people will require transparency, accountability, and financial sustainability. It will provide open access to public procurement, a level playing field for potential investors, and a clear set of agreed deliverables to ensure that Global Gateway projects will deliver what they promise. Those most affected by potential projects must have their full say through proper public consultations and civil society involvement. Projects should ensure affordable and equal access to the

services and benefits they will deliver, notably for women and girls and those at risk of disadvantage or exclusion (ECQ&A 2021, 2).

- Equal partnerships¹⁰

Global Gateway projects will be designed, developed, and implemented in close cooperation and consultation with partner countries. Infrastructure projects will be based on the needs of local economies and local communities, as well as the EU's own strategic interests. This means developing partnerships with countries at eyes-level and ensuring that project planning takes into account the capacity of host countries to manage and maintain the infrastructure in a sustainable way after it has been completed (ECQ&A 2021, 2-3).

- Green and clean

The Global Gateway is a climate-neutral strategy to speed up sustainable development and recovery, create inclusive growth and jobs, and transition to a cleaner and more circular global economy. It will invest in developing infrastructures that are aligned with pathways toward net zero emissions. Projects will live up to the European Green Deal oath to ensure the use of environmental impact assessments and strategic environmental assessments. EU will invest in infrastructure and support regulation to pave the way for the clean energy transition in partner countries. The EU will support regional energy integration, promote energy efficiency, renewable energy, and just transition. The EU will also work with partner countries to invest in infrastructure for developing sustainable and resilient raw materials value chains (ECQ&A 2021, 3).

- Security-focused

Secure infrastructure underpins the resilience of the global economy and supply chains. Global Gateway projects will invest in infrastructure to heal vulnerabilities, provide trusted connectivity, and build capacity in the face of natural or man-made challenges, and physical, cyber, or hybrid threats. They will ensure that citizens are shielded from unwarranted surveillance by public authorities or private companies (ECQ&A 2021, 3).

- Catalysing private sector investment

The Global Gateway will combine and leverage resources from the EU, its Member States, financial institutions, and Multilateral Public Finance, and use these public resources to crowd-in private capital (ECQ&A 2021, 3).

- A digital transition in line with European values and standards

¹⁰ The term equal partnership existed as early as 2008 (Meyn 2008, 526) which shows that rhetoric used in the Global gateway project is not new.

The EU will work with partner countries to deploy digital networks and infrastructures such as submarine and terrestrial fiber-optic cables, space-based secure communication systems as well as cloud and data infrastructures, which together provide a basis for data exchange, cooperation in high-performance computing, artificial Intelligence, etc. The EU will prioritize underserved regions, countries, and populations, with the aim of tackling the global digital divide and strengthening secure digital connections within them and between Europe and the world. The EU will minimize the environmental footprint of digital infrastructure, by promoting green data centers and deploying underwater cables equipped with ocean monitoring sensors (ECQ&A 2021, 3).

- Sustainable, smart, resilient, inclusive, and safe transport networks

Global Gateway will promote worldwide infrastructure investments that create sustainable, smart, resilient, inclusive, and safe transport networks in all modes of transport, including rail, road, ports, airports, as well as logistics, and border-crossing points, in a multimodal system. The EU will implement transport infrastructure projects that foster the sustainable development of partner countries and reduce greenhouse gas emissions, as well as enable the diversification of their supply chains (ECQ&A 2021, 3).

- Health

The EU will be working with partner countries to diversify their pharmaceutical supply chains. The Health and Emergency Preparedness and Response Authority (HERA) will also contribute to addressing international supply chain bottlenecks and establish close collaboration with global partners to prevent future health emergencies and strengthen global surveillance (ECQ&A 2021, 3).

- Education and research

The EU will invest in quality education, including digital education, research, and innovation. Through education, training, youth, and sport exchange programs, the EU facilitates the mobility of students and staff and strengthens higher education institutions and peer learning. The Erasmus+ strengthens societal links and promotes the EU's soft power and the attractiveness of its model of society. Talent Partnerships are supposed to facilitate the mobility of partner countries' young professionals and trainees to Europe for employment or training. The EU also seeks to reinforce global cooperation in the field of research and innovation. The Horizon Europe Program includes opportunities for collaborative research and for the mobility of researchers at an international, inter-sectoral, and interdisciplinary level. Horizon Europe also offers the possibility to associate countries located anywhere in the world, which share fundamental values and with strong science, technology, and innovation profile. The EU will also continue

investing in cultural cooperation between Europeans and citizens in partner countries (ECQ&A 2021, 3).

Symbolically, in its name, and in its core the Global gateway project is designed to counter Chinese engagement in Africa. The rhetoric used in EU documents regarding Global gateway is such that they depict China as an unreliable partner and an actor who wants to harm African countries by capturing them in debt trap arrangements.

EU as a normative power in Sub-Saharan Africa

Former European Union's High Representative for Common Foreign and Security Policy Javier Solana commented: "The EU has the responsibility to work for the 'global common good'" (Aggestam 2008, 6).

In understanding EU's normative power, Ian Manners's works are the most cited ones which mean he is a leading authority on this topic. Manners argues that "the EU represents a new and distinct kind of actor within the international system, and transcends the anarchic and self-interested behavior of states" (Manners 2002, 240). The EU's constitution as an "elite-driven, treaty-based legal order," which implies that its identity and behavior are based upon a set of common values (Ibid, 241). The most significant of these values are peace, liberty, the rule of law, democracy, human rights, anti-discrimination, and good governance. These norms distinguish the EU from traditional state actors. Manners argued that the EU's ability to influence the behavior of others by exporting its values rendered it a distinct kind of actor in world politics (Manners 2002; Manners 2008). The EU's constitution on a normative basis "predisposes it to act normatively in world politics" (Manners 2002, 252). According to this view, the EU is a "force for good within world politics" and enacts a foreign policy aimed at promoting core ethical norms (Aggestam 2008, 1). Mechanisms through which the EU disperses its norms includes the use of positive and negative conditionality in its agreements with third parties (Smith 2001, 188).

The EU's normative stance has been reflected in its consistent support for international legal order (Hardwick 2011). A key example of this was the EU's policy of encouraging African states to join the International Criminal Court (ICC) (Schiepers and Sicurelli 2008, 611). Manners states that:

"the EU diffuses its norms by example, rather than in the coercive manner of traditional military power. One of the most important norms of EU normative power is that of human rights, closely linked to the policy of conflict prevention. When dealing with third countries, EU stipulates conditionality clauses that bind the recipients to practice ethical human rights, as stipulated in the

European Convention on Human Rights. In addition, the EU includes human rights clauses with trade partners" (Manners 2006, 187).

However, this statement by Manners had been proved wrong. The greatest limitation of the EU's normative power is the discrepancy between the EU's ethical norms and the material interests of member States hence member states have consistently prioritized their economic interests at the expense of the EU's ethical norms. For instance, The EU did not propose resolutions critical of China in 1996. This change was orchestrated by Germany and France, whose trade relations with China started to grow at the time (Balducci 2010, 43). A regular human rights dialogue with China was initiated instead of condemning resolutions. However, these meetings have been labeled as "no more than a means for the Chinese government to channel criticism of its human rights record" (Baker 2002, 59). As Lucarelli points out, "the EU continued to sponsor resolutions critical of Zimbabwe until 2004, and of Sudan until at least 2007" (Lucarelli 2010, 40). This testifies to the double standards of the EU and shows that in practice, economic interests play a greater role in the EU's external policy than its self-identification as a normative actor.

Two other examples of the EU's moral hazard easily come to mind: Bosnia and Herzegovina and the case of the secessionist Serbian province of Kosovo. In the case of Bosnia and Herzegovina, the EU is supporting a highly controversial institution of "High representative" whose authorities are not much different from those that colonial administrators once had (Jahić 2021). In the case of Kosovo,¹¹ the EU is proclaiming to be an unbiased mediator but in reality, it is facilitating the recognition of the secessionist province. In a bizarre demonstration of double standards, EU is full-heartedly supporting the territorial integrity of Ukraine, while simultaneously pressuring and conditioning Serbia to forfeit its own territorial integrity and sovereignty (EEAS 2021).

In the African context, the extent of the EU's structural power makes it the dominant partner within EU–Africa relations. EU's role as a dominant partner influences the structuring of security cooperation. The extent of its resources, the length of its integration experience, and its position in prior European–African relations make EU the dominant partner. However, the role of the EU as a dominant power does not preclude some African advantages in EU–Africa relations. In addressing the EU's engagement with Africa on migration African countries exploit EU capability deficiencies to further their own agendas (Haastруп 2013, 43). For example, In 2002 and 2004 African nations have resisted the intervention of the EU, when they joined with Asian nations at the UNCHR to block EU-sponsored

¹¹ In accordance with UNSC resolution 1244.

resolutions condemning Zimbabwe (Smith 2006, 165). Hence, the EU's attempts to export its values have not always been well-received by third states.

On the other hand, the existing power asymmetry between the EU and Africa does not automatically rule out the ability of the EU to achieve the aims of new EU–Africa relations. In fact, the EU shows its strength in civilian crisis management and articulates its position as a civilian crisis actor. As Hastuup points out “the idea of normative power in relation to Europe potentially gives a holistic view of EU international actorness in many areas, including sustainable peace (and security) beyond militarised interventions” (Haastrup 2013, 37). However, this claim is refuted by the events in Ukraine, where the European Union supports one side.

Given the final judgment of the European Union as a normative power, it can be perceived that the EU is only self-portrayed as a normative power while others see it as a coercive power.

Conclusion

This paper aims to show that the entire relationship of the European Union with African countries is based on the preservation of the colonial order, more precisely on the creation of neo-colonial dependencies. The various documents that were signed in order to develop cooperation with Africa had hidden goals within them – to break the traditional colonial blocs and grant the equal right to exploit Africa to all countries of the European Community (later the European Union). The latest investment framework – the Global gateway recycles old narratives about an equal partnership, but at least recognizes the interest of the European Union and does not propagate pure altruism like earlier strategic documents. In its essence, it is more of an anti-Chinese action plan than an original idea that promotes cooperation between the European Union and Africa. The financial resources available for this project do not represent the fresh supply of cash but are a combination of remnants of other EU investment instruments.

In its attempts to represent a normative power, the European Union exhibits double standards and inconsistency. The mechanisms in which the European Union proliferates its norms represent the relapse of colonial behavior by apostrophizing the assumed superiority of European civilization, nowadays illustrated via democracy, transparency, and human rights standards. Constantly seeking self-affirmation through the process of othering the EU is forcing its own anti-Chinese sentiment on Africa. However, as shown in Africa and elsewhere, various countries are increasingly rejecting the European value package. By insisting on its norms

using punishment mechanisms European Union is becoming a coercive power rather than a normative one.

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Danilo BABIĆ

**ODNOSI EU I SUBSAHARSKE AFRIKE:
ISTORIJA (NE)JEDNAKOG PARTNERSTVA**

Abstrakt: Ovaj rad istražuje neke eksploatatorske ekonomske tendencije u odnosima između Afrike i EU, polazeći od Rimskog ugovora, pa nadalje kroz inicijative Jaunde, Lome i Kotonua. Vremenom, eksploatatorski aspekti ovog odnosa postaju sve zamagljeniji kroz promene vokabulara i suptilnije ekonomske mehanizme. Svaki novi okvir saradnje nastojao je da naglasi važnost jednakog u partnerstva na liniji EU-Afrika, ali je nejednakost između dve strane stalno rasla. To je slučaj i sa najnovijim strateškim okvirom zvanim "globalna kapija". Taj investicioni plan je *ad hoc* inicijativa osmišljena da se suprotstavi kineskim interesima u regionu. EU nastoji da bude kreator normi na afričkom kontinentu. U radu se preispituje sposobnost EU da ispuni tu ulogu.

Ključne reči: Afrika, EU, "globalna kapija", ravnopravno partnerstvo Jaunde, Lome, Kotonu.

Transnacionalni odnosi i svetska politika: novi pristup

Ruzbeh (Rudi) B. BEJKE¹

Abstrakt: U poslednjih četrdeset godina došlo je do naglog porasta broja transnacionalnih aktera u međunarodnom sistemu. To je pokrenulo još uvek nedovršenu polemiku u oblasti međunarodnih odnosa o tome kako transnacionalni akteri utiču na državnu aktivnost. U novijoj literaturi o „transnacionalnim naukama“ u okviru međunarodnih odnosa mogu se uočiti dve struje: prvu čine zagovornici pristupa koji državu vide kao dominantnu silu u svetskoj politici, dok drugu čine oni koji uspon transnacionalnih aktera posmatraju kao empirijski dokaz da država kao akter u međunarodnom sistemu polako gubi primat. Novija literatura iz sredine 90-tih godina prošlog veka pokušala je da transnacionalne nauke udalji od te stare polemike. Ono što obe strane previđaju jeste činjenica da zapravo dele isto istraživačko pitanje. Naime, i jedne i druge zanima *način* na koji transnacionalni akteri *mogu uticati* na državno ponašanje, samo što im se pristupi razlikuju. Kao rezultat dobijamo neadekvatno objašnjenje značaja transnacionalnih aktera i niz problema u merenju zbog preopširnosti osnovnih pojmova. Ovaj članak predlaže novi teorijski okvir za testiranje sposobnosti transnacionalnih aktera da utiču na državno ponašanje.

Ključne reči: transnacionalni akteri, državno-centrični, društveno-centrični, interdisciplinarni, pravna rekurzivnost.

Uvod

Porastom broja transnacionalnih aktera u međunarodnom sistemu u poslednjih četrdeset godina, pokrenuta je još uvek nedovršena polemika o tome kako oni

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utiču na državnu aktivnost. U novijoj literaturi o „transnacionalnim naukama“ u okviru međunarodnih odnosa mogu se uočiti dve struje: državno-centrična i društveno-centrična. Državno-centrični pristup posmatra transnacionalne aktere kao interventne faktore koji mogu pomoći državama u međusobnoj saradnji, implementaciji strateških mera ili, alternativno, u kontroli ponašanja i aktivnosti. Društveno-centrični pristup, s druge strane, posmatra širenje transnacionalnih aktera kao dokaz da je došlo do erodiranja primata države u strateškom odlučivanju (počev od regulacije životne sredine pa sve do međunarodnih finansijskih tržišta). U novijoj literaturi iz sredine 90-ih godina prošlog veka navodi se da se polemika između zastupnika državno-centričnog i društveno-centričnog pristupa zapravo zasniva na pogrešnoj premisi; sasvim je jasno da obe strane dele isto istraživačko pitanje, budući da i jedne i druge zanima *način* na koji transnacionalni akteri *mogu* uticati na državno ponašanje, samo što im se razlikuju pristupi. Ovim uvidom otvaraju se vrata za novi teorijski okvir za istraživanje uticaja transnacionalnih aktera na državno ponašanje. Taj okvir identifikuje dva opšta faktora koja mogu oblikovati uticaj transnacionalnih aktera: međunarodnu institucionalizaciju i domaće državne institucionalne strukture.²

Jasno je da je literatura koja se pojavila sredinom 90-ih krenula u pravom smeru time što se udaljila od širokih polemika o tome da li je država ili međunarodno društvo adekvatna jedinica analize i time što je utvrdila faktore koji mogu oblikovati uticaj transnacionalnih aktera. Bez obzira na sve to, ne može se izbeći utisak nedorečenosti usled neadekvatnog objašnjenja značaja transnacionalnih aktera i niza problema u merenjima zbog preopširnosti ključnih koncepata. Novija istraživanja mahom podražavaju prethodna istraživanja. Bez obzira što je veliki broj autora podržao prvobitni poziv za premošćavanje jaza između stare državno-centrične i društveno-centrične polemike, samo nekolicina je zaista i preduzela korake u tom pravcu. Uz to, mali broj autora koji su zaista pokušali da prevaziđu ovu polemiku i da ispituju način na koji transnacionalni akteri mogu uticati na državno ponašanje, ne konsultuju literaturu iz drugih disciplina koje se bave ovim pitanjem, a naročito iz oblasti sociološko-pravnih i političkih nauka. Takav ograničen pristup je problematičan, jer literatura iz drugih disciplina koja se bavi problemom interakcije međunarodnog i nacionalnih sistema, može da bude od velikog značaja za transnacionalne nauke. Štaviše, sociološko-pravne i političke nauke, u kombinaciji sa novijom literaturom u oblasti transnacionalnih nauka, u združenom interdisciplinarnom okviru, mogle bi umnogome poboljšati kako razumevanje

² Za detaljnu diskusiju o navedenim faktorima, videti *infra* § I(B).

ključnih faktora koji utiču na sposobnost transnacionalnih aktera da utiču na državno ponašanje, tako i načine na koji se ovakav uticaj može izmeriti.

Sociološko-pravna literatura koja se bavi interakcijom između normi na međunarodnom i nacionalnom nivou, kao i politikolozi koji proučavaju određene institucionalne uticaje, mogu u velikoj meri doprineti razumevanju načina na koji transnacionalni akteri funkcionišu i kako utiču na državno ponašanje. Sociološko-pravne nauke, koje ukazuju na značaj mehanizama koji rukovode interakcijom između međunarodnih i nacionalnih sistema, pružaju analitički pouzdan i metodološki sistematičan model za izučavanje odnosa između ova dva nivoa. Literatura iz ove oblasti definiše prirodu nastanka normi i njihove interakcije kao iterativnu, odnosno okarakterisanu rekurzivnim ciklusima koji upravljaju procesom preobražaja sukobljenih normi u razrešene. Ova karakterizacija jasno doprinosi proučavanju načina na koji transnacionalni akteri mogu usvojiti i koristiti norme (bez obzira da li se radi o međunarodnim ili nacionalnim normama po poreklu / prirodi). Ona takođe doprinosi boljem razumevanju pitanja da li priroda normi može uticati na sposobnost transnacionalnih aktera da utiču na državno ponašanje, gde se pod „prirodom” normi podrazumeva pitanje da li su one podložne suprotstavljenim stavovima i sukobima u pogledu njihovog značenja i primene, odnosno da li su stekle status prihvaćenih i, time, autoritativnih normi. Isto tako, isticanje, unutar određenih struja u političkim naukama, sposobnosti institucija da vrše posredovanje i oblikuju ishode, kao i značaj vremena i istorijske trajektorije u međunarodnoj izdržljivosti i dizajnu, pruža osnovu za snažan korak napred u pravcu izučavanja interakcija koje predstavljaju srž transnacionalnih nauka. Sva ova literatura predstavlja putokaz za proučavanje načina na koji određeni primeri institucionalnog dizajna mogu da utiču na sposobnost transnacionalnih aktera da utiču na državno ponašanje, kao i na razvoj ovih procesa kroz vreme.

Ovaj rad predlaže novi teorijski okvir za ispitivanje sposobnosti transnacionalnih aktera da utiču na državno ponašanje. Taj okvir polazi od dosadašnjih saznanja iz postojeće literature o „transnacionalnim naukama” u međunarodnim odnosima, a zatim razmatra literaturu iz sociološko-pravnih i političkih nauka kako bi korigovao problem nedovoljne određenosti. Novi interdisciplinarni okvir: (1) jasnije određuje niz varijabli koje utiču na sposobnost transnacionalnih aktera da utiču na domaću državnu politiku, (2) zamenjuje nejasne koncepte „međunarodna institucionalizacija” i „domaća državna struktura” detaljnijim i konkretnijim konceptima koji se baziraju na rekurzivnoj prirodi formiranja normi i značaju institucionalne strukture u uticaju na ishode. Interdisciplinarni pristup izučavanju transnacionalnih odnosa prezentuje ne samo novu, sistematičniju strukturu za ispitivanje načina na koji transnacionalni akteri utiču na državno ponašanje, već i shvatanje da se proučavanje transnacionalnih aktera može vršiti kako u okviru više različitih disciplina, tako i primenom više različitih

metoda. Interdisciplinarni pristup proučavanju transnacionalnih odnosa predstavlja korak napred ka rigoroznijem i sistematičnijem merenju varijabli koje upravljaju odnosima koji su predmet istraživanja, kao i jasnu identifikaciju potencijalnih uzročnih mehanizama koji upravljaju tim odnosima.

Stanje transnacionalnih nauka: prošlost i sadašnjost

U poslednjih nekoliko decenija položaj transnacionalnih nauka unutar međunarodnih odnosa polako se menja, kako po pitanju teorijskog utemeljenja, tako i u pogledu fokusa istraživačkih pitanja na koje su autori iz ove podoblasti pokušali da odgovore. U vremenskom periodu nakon Drugog svetskog rata naročito je bila aktuelna debata između državno-centričnog i društveno-centričnog pristupa. Ova debata polako se zamenjuje pokretom koji je pokušao da redefiniše pravac nacionalnih istraživanja udaljavanjem od stare državno-centrične i društveno-centrične debate i da se, umesto toga, fokusira na sintetizovanje ova dva pristupa u realnije sagledavanje međunarodnog sistema i mesta transnacionalnih odnosa unutar njega. Iako je došlo do određenog, limitiranog pomaka u tom pravcu, potrebno je uložiti još puno truda da bi se to postiglo.

Stara debata: državno-centrični i društveno-centrični pristup

Sa prestankom Drugog svetskog rata i nastankom Ujedinjenih nacija, u međunarodnom sistemu nastupa jedan novi period u kojem dolazi do rasta broja transnacionalnih aktera i jačanja njihovog uticaja. S obzirom na ovu novu stvarnost, autori u oblasti društvenih nauka počeli su da posvećuju veću pažnju ulozi koju transnacionalni akteri igraju u aktivnostima i ponašanju država u međunarodnom sistemu. Takav, državno-centrični pristup dominirao je u literaturi preko dve decenije sve dok nova grupa autora nije počela da zagovara novi pravac u izučavanju transnacionalnih aktera. Taj novi pravac staviće u drugi plan ulogu transnacionalnih aktera u uticaju na državno ponašanje u međunarodnom sistemu, a fokus preusmeriti na izučavanje načina na koji transnacionalni akteri zapravo stvaraju novo institucionalizovano okruženje u kojem dolazi do erodiranja primata države (unutar međunarodnog sistema) u procesu donošenja odluka.

Državno-centrični pristup proučavanju transnacionalnih aktera u međunarodnom sistemu uzeo je maha sa završetkom Drugog svetskog rata i potonjim širenjem međunarodnih organizacija u okviru međunarodnog sistema. Porastom broja novih međunarodnih institucija, mnogi su počeli da se bave

pitanjem da li takve organizacije mogu uticati na državno ponašanje, i, ako mogu, kako. Rana istraživanja tog tipa fokusirala su se na nalaženje odgovora na pitanje kako velike međunarodne organizacije utiču na ponašanje njihovih država članica. Analiza je sprovedena u naročito problematičnim oblastima, kao što su sposobnost država da oblikuju ili sabotiraju stvaranje režima multilateralnih međunarodnih ugovora (Little 1949), uticaj članstva u međunarodnim organizacijama kako na spoljnu politiku država članica (Cohen 1954; Gorter 1954; Matecki 1956), tako i na podsticanje prirodnog dogovora između država članica u području kolektivne bezbednosti (Johnson & Niemeyer 1954), kao i sposobnost međunarodnih organizacija da ciljno deluju na nacionalno zakonodavstvo, odnosno da ga lobiraju (Mower 1964; Cox & Jacobson (Eds.) 1973). Rezultati do kojih su došli različiti autori ukazali su na gotovo jedinstvenu sposobnost međunarodnih organizacija da utiču na promenu ponašanja na domaćem nivou.

Društveno-centrični pristup izučavanju transnacionalnih aktera u međunarodnom sistemu pojavio se 70-tih godina prošlog veka, kao reakcija na državno-centrični pristup koji je dominirao ovom oblašću od kraja Drugog svetskog rata. Udaljivši se od države kao jedinice, nova grupa autora počela je da se zanima načinom na koji međunarodne institucije vrše autonomni uticaj na međunarodni sistem. Pažnju usmeravaju na problematiku načina na koji novi međunarodni sistem međusobno povezanih organizacija i režima multilateralnih međunarodnih ugovora vrši direktni uticaj na međunarodni sistem bez posredovanja ili filtriranja kroz državu (Keohane & Nye (Eds.) 1972; Mansbach, Ferguson, & Lampert 1976; Jacobson 1979; Rosenau 1980; Willets (Ed.) 1982). Nove „akcione jedinice” u ovim interakcijama prestaju da budu države i postaju transnacionalni akteri koji znaju kako da povežu razne nacionalne interesne grupe u raznim interesnim sferama i da im pomognu u koordiniranju aktivnosti (Nye & Keohane 1972, xviii-xix; Mansbach, Ferguson, & Lampert 1976, 41-45; Jacobson 1979, 398-414; Rosenau 1980, 1-2), ili da, s druge strane, stvore okruženje gde domaće vlade više ne mogu samostalno da ostvaruju sopstvene interese u datoj sferi, već moraju da traže pomoć transnacionalnih aktera i mreža (Nye & Keohane 1972, xix-xx; Jacobson 1979, at 416-422; Willets 1982, 21-22).

Udaljavanje od državno-centričnog / društveno-centričnog pristupa

Novi teorijski okvir za proučavanje transnacionalnih aktera nastaje sredinom devedesetih godina prošlog veka, sa objavljivanjem dela Tomasa Rise-Kapena (Thomas Risse-Kappen) pod naslovom *Bringing Transnational Relations Back In [Povratak transnacionalnih odnosa]*. U ovom delu, autor pokušava da redefiniše pravac transnacionalnih nauka udaljavanjem od državno-centrične i društveno-

centrične debate. Autori u oblasti transnacionalnih nauka, po njemu, ne treba da se bave pitanjem koji pristup treba da prevlada u ovoj debati, već da osmisle kako da se ta dva pristupa sintetizuju u pravcu realnijeg razumevanja međunarodnog sistema i mesta transnacionalnih odnosa unutar njega (5). Ovaj stav ima smisla, budući da se obe strane u debati u većoj meri slažu nego što se mimoiđaze. Štaviše, saznanja zagovarača³ državno-centričnog pristupa ne razlikuju se u velikoj meri od istraživačkih pitanja i saznanja zagovarača društveno-centričnog pristupa.⁴ Zagovarače državno-centričnog pristupa pre svega zanima kako međunarodni ili transnacionalni akteri direktno mogu uticati na domaću državnu aktivnost. Slično tome, zagovarače društveno-centričnog pristupa, koji su hronološki mlađi, pre svega zanima izučavanje uticaja transnacionalnih aktera unutar međunarodnog sistema. Kao što se može zaključiti iz pregleda radova hronološki starijih državno-centričnih autora,⁵ državno-centrični pristup prihvata shvatanje da međunarodni ili transnacionalni akteri mogu nezavisno oblikovati ponašanje i interese unutar međunarodnog sistema.

Uvidevši da se kod državno-centrične / društveno-centrične debate zapravo radi o semantičkoj razlici, Rise-Kapen umesto nje predlaže da se autori iz oblasti transnacionalnih nauka pozabave pravim istraživačkim problemom, a to je pod kojim međunarodnim i nacionalnim okolnostima „transnacionalne koalicije i akteri koji pokušaju da promene ishode strateških mera u određenoj problemskoj oblasti uspevaju ili ne uspevaju da ostvare svoje ciljeve?“ („transnational coalitions and actors who attempt to change policy outcomes in a specific issue-area succeed or fail to achieve their goals?“ Risse-Kappen 1995, 5). Rise-Kapen polazi od ovog pitanja kada pokušava da konstruiše teorijski okvir za utvrđivanje uslova u kojima transnacionalni akteri uspešno vrše uticaj na domaće državne strateške mere / ponašanje države. Rise-Kapen konceptualizuje⁶ teorijski okvir koji se oslanja kako na institucije i mreže na nacionalnom nivou, tako i na norme na međunarodnom nivou u čijem okviru one deluju, kako bi identifikovao uticaj strateških mera transnacionalnih aktera (Risse-Kappen 1995, 6). On identifikuje dve nezavisne varijable koje mogu uticati na uticaj domaćih strateških mera: varijacija u stepenu međunarodne institucionalizacije u pogledu zagovaranih strateških mera, kao i varijacija u sastavu institucionalnih struktura na nacionalnom nivou u onoj državi na koji se želi izvršiti uticaj.

Međunarodna institucionalizacija od značaja je zbog toga što ovaj proces može delovati kao sila koja olakšava ulazak transnacionalnih aktera u strukture na

³ Videti *supra* § I(A).

⁴ Videti *supra* § I(A).

⁵ Videti *supra* § I(A).

⁶ „Konceptualizacija“ se ovde definiše kao dodeljivanje značenja. Videti Sartori 1970, 1033-1034.

nacionalnom nivou (Ibid, 31). Međunarodni režimi⁷ mogu izvršiti uticaj time što će smanjiti moć države da ograniči pristup transnacionalnih aktera raspoloživim ulaznim tačkama za prodor u sistem (Ibid). Ukoliko su deo neke vrste regulativnog međunarodnog režima (npr. protokol iz Kjota za regulisanje emisije ugljen-dioksida, ili Helsinški odbor koji uspostavlja mehanizam za nadzor nad ljudskim pravima u Evropi, itd), čak i one države koje su maksimalno konsolidovane ili centralizovane imaju ograničene opcije ako pokušaju da ograniče transnacionalni pristup u svoje domaće strukture.

Značaj struktura na nacionalnom nivou ili „domaćih“ struktura, ogleda se u tome što one kontrolišu sposobnost transnacionalnih aktera da pristupe ciljanim institucijama države, kao i formiranje „pobedničkih strateških koalicija“ sa relevantnim akterima na nacionalnom nivou nakon prodora u sistem (Ibid, 6-7, 25). Domaće strukture „vrše posredovanje, filtriranje i refrakciju nastojanja transnacionalnih aktera i alijansi da utiču na strateške mere“ (“mediate, filter, and refract the efforts by transnational actors and alliances to influence policies”; Ibid, 25). Što su domaće strukture konsolidovanije (Ibid, 23-24), to je teže za transnacionalne aktere da prodru u sistem. Postoji veća verovatnoća da će države sa koncentrisanom moći i rigidnim institucijama moći da ograniče ulaz i delovanje transnacionalnih aktera kroz pravne i / ili finansijske prepreke. Uzevši navedeno u obzir, ukoliko transnacionalni akteri uspeju sa prodorom u tako rigidne institucije, njihov će uticaj, vrlo verovatno, biti masivan (Ibid, 6, 26-27). Isto važi i za obrnuti scenario; što su domaće strukture u državi difuznije, to je lakše za transnacionalne aktere da prodru u sistem (Ibid, 27-28). U takvom okruženju, međutim, prodor će verovatno biti lak, ali, zbog fragmentovanih institucija koje karakterišu takve sisteme, strateške mere verovatno neće imati jak uticaj, budući da će transnacionalni akteri morati da ulaze u brojne ukrštene koalicije kako bi bili mogli da izvrše uticaj na takve institucije (Ibid, 27-28).

Tomas Rise-Kapen u knjizi *Bringing Transnational Relations Back In* konceptualizuje svet u kojem međunarodne i strukture na nacionalnom nivou stoje rame uz rame dok transnacionalni akteri pokušavaju da prodru u domaće institucionalne strukture. Iako je Rise-Kapenov teorijski okvir bio od velikog značaja za prevazilaženje širokih diskusija o tome da li je država ili međunarodno društvo adekvatna jedinica analize, kao i po tome što utvrđuje faktore koji oblikuju uticaj transnacionalnih aktera, on, ipak, ostaje nedovoljno određen, kao što će se videti

⁷ „Režimi“ se ovde definišu kao „implicitni ili eksplicitni principi, norme, pravila i procesi odlučivanja u kojima se očekivanja aktera u određenoj [problemskoj oblasti] poklapaju“ (“implicit or explicit principles, norms, rules and decision-making procedures around which actors’ expectations converge in a given [issue area]”, videti Krasner 1983, 2)

u tekstu koji sledi.⁸ Iako je Rise-Kapenov okvir inovativan po tome što se fokusira na proizvođenje hipoteza, kao i po dualističkoj analizi načina na koji transnacionalni akteri deluju na domaće ponašanje na sistemskom / nacionalnom nivou, Rise-Kapenov okvir o ponašanju transnacionalnih aktera ne uspeva da sistematski operacionalizuje⁹ nezavisne varijable koje navodi. Kao rezultat dobijamo neadekvatno objašnjenje značaja transnacionalnih aktera koje je prouzrokovano preopširnošću temeljnih koncepata. Nažalost, literatura koja je usledila ne samo da nije obradila problematiku merenja u Rise-Kapenovom okviru, već nije uspela ni da se na neki smisleniji način udalji od poziva Rise-Kapena da se prevaziđe debata između državno-centričnog i društveno-centričnog pristupa.

Trenutno stanje poddiscipline transnacionalnih nauka

Od pojave novog teorijskog okvira za izučavanje transnacionalnih aktera sredinom 90-tih godina prošlog veka, nije došlo do napretka u ovoj novoj oblasti za empirijsko istraživanje unutar transnacionalnih nauka u nekom održivom ili sistematičnom smislu. Trenutno stanje je takvo da se skorija literatura uglavnom bavi podražavanjem prethodnih istraživanja. Iako mnogi istraživači pozivaju na prevazilaženje stare državno-centrične / društveno-centrične debate, samo retki su to zaista i preduzeli. Uz to, radovi koji pokušavaju da prevaziđu tu debatu i ispituju kako transnacionalni akteri mogu uticati na državno ponašanje, nisu na neki značajniji način angažovali literaturu iz drugih disciplina koje razmatraju to pitanje. Zaista je šteta što je došlo do ovog nenameravanog parohijalizma, jer literatura iz drugih oblasti koja posmatra reakciju međunarodnog i nacionalnih sistema može puno da doprinese poddisciplini transnacionalnih nauka.

Propuštene prilike

Veliki deo trenutne literature u oblasti transnacionalnih nauka, nažalost, nije usavršio, iskoristio na neki sistematičan način, ili eventualno unapredio prospektivni teorijski okvir za izučavanje transnacionalnih aktera koji je uveden sredinom 90-tih godina. Pregled važnijih empirijskih istraživanja u poddisciplini od 1995. godine naovamo ukazuje na more propuštenih prilika.

⁸ Videti *infra* § II(B).

⁹ Upuštanje u empirijska istraživanja podrazumeva da mora doći do dodeljivanja određenih vrednosti fenomenu koji se proučava, jer se samo na taj način može izmeriti predmet izučavanja, bez obzira koliko nesavršen taj proces bio. U društvenim naukama, ovaj proces naziva se „operacionalizacija“. Videti, npr. Adcock & Collier 2001; Munck & Verkuilen 2002.

U svom radu, *National Interests in International Society* [*Nacionalni interesi u međunarodnom društvu*], objavljenom 1996. godine, ubrzo nakon objavljivanja *Bringing Transnational Relations Back In*, Marta Finemor (Martha Finnemore) razmatra pitanje da li se države mogu „socijalizovati” preko mreže aktera (državnih i transnacionalnih) koji čine međunarodni sistem (2). Odbacivanjem pretpostavke realista da države imaju nefleksibilne ciljeve da ostvare „moć, bezbednost i bogatstvo,” Finemorova razvija socijalno-konstruktivistički pristup koji zastupa stav da socijalizacija unutar međunarodnog sistema može uticati na prioritete domaćih država (Ibid, 1-3, 5, 13). Finemorova empirijski testira svoju teoriju kroz tri studije slučaja o tome kako međunarodne institucije (Organizacija Ujedinjenih nacija za obrazovanje, nauku i kulturu ili UNESCO; međunarodni Crveni krst i Svetska banka) mogu da nanovo konstruišu interese različitih domaćih nacionalnih država članica. Ova ponovna konstrukcija interesa postiže se kroz „podučavanje,” gde razne međunarodne organizacije prikazuju (njihovim domaćim nacionalnim državama članicama) nove međunarodne norme „donošenjem dnevnih redova, definisanjem zadataka i preciziranjem interesa” (“setting agendas, defining tasks, and sharpening interests”; Ibid, 12-13). Iako ima zanimljive zaključke, studija Finemorove ide već utabanim stazama prethodnih istraživača kao što su Kon, Džonson i Nimejer (Cohn, Johnson i Niemeyer), Kiohejn i Naj (Keohane i Nye), i Vilets (Willemts), a koji istražuju različite načine na koji međunarodne ili transnacionalne organizacije mogu uticati na stavove elita i javne stavove unutar ciljnih domaćih država.

U knjizi pod nazivom *Transnational Social Movements and Global Politics* [*Tradicionalni društveni pokreti i globalna politika*], objavljenoj 1997. godine, Džeki Smit, Čarls Četfild i Ron Panjuko (Jackie Smith, Charles Chatfield, i Ron Pagnucco) razmatraju transnacionalne aktere koji deluju kao grupe za javno zagovaranje (međunarodne nevladine organizacije), dok iz analize isključuju velike međunarodne organizacije koje države posmatraju kao članice (12-15). Koristeći sintagmu „transnacionalne organizacije – društveni pokreti” (“transnational social movement organizations” ili TSMO) za označavanje posmatranih transnacionalnih organizacija, Smitova, Četfild, Panjuko i ostali autori u knjizi ispituju kako razni TSMO-ovi uspevaju da nametnu svoje strateške prioritete domaćim državama organizovanjem izbornih jedinica, ciljanjem na međunarodne organizacije i mobilizovanjem resursa. Iako je broj TSMO-ova koje posmatraju impozantan, uvidi do kojih su došli Smitova, Četfild i Panjuko ne odmiču puno od istraživača kao što je već spomenuti Viltes i njegovog rada na „transnacionalnim grupama za vršenje pritiska”. Štaviše, Smitova, Četfild i Panjuko izostavljaju iz analize TSMO-ova metode kojima međunarodne sile kao i institucije na nacionalnom nivou mogu uticati na sposobnost transnacionalnih aktera da utiču na promenu strategije.

Knjiga Ričarda A. Higota, Džefrija R.D. Anderhila i Andreasa Bilera (Richard A. Higgott, Geoffrey R. D. Underhill i Andreas Bieler), *Non-State Actors and Authority in the Global System* [Nedržavni akteri i autoritet u globalnom sistemu], objavljena 2000. godine, ponavlja poziv Rise-Kapena iz *Bringing Transnational Relations Back In* da se prevaziđe stara državno-centrična / društveno-centrična debata. Proučavajući uticaj globalizacije na državnu moć, Higot, Anderhil i Biler navode da, iako je došlo do slabljenja države u određenim područjima, globalizacija je, nasuprot tome, ojačala moć države u drugim poljima (1). Ponavljajući saznanja iz dela Smita, Četfilda, i Panjuka o fokusiranju na sposobnost transnacionalnih aktera da lobiraju i proguraju strateške prioritete, Higot, Anderhil i Biler nalaze da transnacionalni akteri (posebno nevladine organizacije sa globalnim / transnacionalnim dometom) mogu učvrstiti lokalne nevladine organizacije kroz transfer strateških saveta i obuke (što će na taj način uticati na domaće ponašanje) (4; videti i Jakobsen 2000). Ovo saznanje, iako korisno i kvalitetno, samo ponavlja prethodne opservacije Smitove, Četfilda i Panjuka.

Ograničeni napredak

Uprkos, u globalu, neuspešnim nastojanjima u oblasti transnacionalnih nauka da se napravi pomak u istraživanjima u ovoj poddisciplini u odnosu na korake koji su napravljeni sredinom 90-tih godina prošlog veka, ipak se može uočiti određeni ograničeni napredak kod autora koji su bili spremni da se pozabave idejama koje su prvi put predstavljene u Rise-Kapenovoj *Bringing Transnational Relations Back In*, odnosno da pristupe njihovoj razradi. Pregled literature pokazuje da je, možda neplanirano, ipak došlo do pomaka u izučavanjima transnacionalnih aktera u interdisciplinarnom pravcu.

U radu pod nazivom *Activists Beyond Borders* [Aktivizam izvan granica], objavljenom 1998. godine, Margaret I. Kek i Ketrin Sikink (Margaret E. Keck i Kathryn Sikkink) bave se ne samo transnacionalnim akterima i njihovom sposobnošću da utiču na državno ponašanje, već idu i korak dalje u pravcu izučavanja „mreže” transnacionalnih grupa za javno zagovaranje.¹⁰ „Transnacionalne mreže za javno zagovaranje” (“transnational advocacy networks”) sastoje se iz „relevantnih aktera koji sarađuju na međunarodnom planu u rešavanju određenog problema” (“relevant actors working internationally on an issue”), i koji „dele zajedničke vrednosti, diskurs,

¹⁰ Mora se primetiti da se, poput Smitove, Četfilda i Panjuka u *Transnational Social Movements and Global Politics*, Kekova i Sikinkova ograničavaju na transnacionalne aktere koji su grupe za javno zagovaranje (međunarodne nevladine organizacije), dok zanemaruju velike međunarodne organizacije koje domaće države posmatraju kao članice.

razmenjuju informacije i usluge” (“bound together by shared values, a common discourse, and a dense exchange of information and services”; Ibid, 2). Usvojivši sociološki koncept „analitičkih okvira”,¹¹ Kekova i Sikinkova tvrde da transnacionalne mreže za javno zagovaranje deluju delimično s ciljem da oblikuju i prezentuju pitanja na način koji može da „ozakoni i motiviše kolektivnu akciju” (“legitimate and motivate collective action”; Ibid, 2-4, 16-17). Pohvalnim citiranjem dela *Bringing Transnational Relations Back In* i teorijskog okvira koji je tu predstavljen (sa naglaskom na pitanju kako institucije na nacionalnom nivou i međunarodne sile mogu uticati na sposobnost transnacionalnih aktera da utiču na promenu strateških ciljeva), Kekova i Sikinkova osmišljavaju model koji objašnjava kako transnacionalne mreže za javno zagovaranje konceptualno uobličavaju problematiku i motivišu kolektivnu akciju kako bi došlo do promene određenih strateških ciljeva u datim domaćim državama. Nazvavši taj model „modelom bumeranga” (“boomerang pattern”), Kekova i Sikinkova konceptualizuju svet u kojem domaće grupe za javno zagovaranje (u državi na koju se ciljano deluje) mogu aktivirati transnacionalnu mrežu za javno zagovaranje (koju čine grupe za javno zagovaranje širom sveta sa transnacionalnim pristupom), a koja onda može da izvrši pritisak (kroz konceptualno uobličavanje zadatih pitanja i time motivisanje kolektivne akcije) na druge države i relevantne međunarodne organizacije (Ibid, 12-16).

U delu *The Power of Human Rights*, objavljenom 1999. godine, Tomas Rise, Stiven C. Rop (Stephen C. Ropp), i Ketrin Sikink pokušali su da razrade „model bumeranga,” koji su predstavile Kekova i Sikinkova u delu *Activists Beyond Borders*, i da ga sintetizuju unutar šireg teorijskog okvira koji je ranije predstavljen u *Bringing Transnational Relations Back In*. Direktno primenjujući teorijski okvir izložen u *Bringing Transnational Relations Back In* (ali se ograničavajući na transnacionalne mreže za javno zagovaranje u području ljudskih prava), Rise, Rop, i Sikinkova iznose mišljenje da varijacija u sastavu struktura na nacionalnom nivou države na koju se planira izvršiti uticaj, kao prva nezavisna varijabla koja je predstavljena u ranijem modelu, ne mora biti fluidan koncept (4-5). To znači da Rise, Rop, i Sikinkova smatraju da transnacionalne mreže za javno zagovaranje mogu, pod pravim uslovima, promeniti i same strukture na nacionalnom nivou (Ibid, 4-5). Pretočivši ove uslove u složeni model (koji nazivaju „spiralnim modelom”; “spiral model”),

¹¹ Analitički okviri „oblikuju ili dodeljuju značenje i interpretiraju relevantne događaje i uslove na način koji omogućava da se mobilizuju potencijalni sledbenici i podržavaoci, odnosno pridobije podrška posmatrača i demobilizuju antagonisti.” (“frame, or assign meaning to and interpret relevant events and conditions in ways that are intended to mobilize potential adherents and constituents, to garner bystander support, and to demobilize antagonists, videti Snow and Benford 1988, 198.)

Rise, Rop, i Sikinkova tvrde da originalni „model bumeranga” Kekove i Sikinkove može da se razradi (Ibid, 17-19). „Spiralni model” konceptualizuje svet u kojem, baš kao i u „modelu bumeranga”, domaće grupe za javno zagovaranje (u državi na koju se planira izvršiti uticaj) mogu aktivirati njihove transnacionalne mreže za javno zagovaranje (koju čine grupe za javno zagovaranje širom sveta sa transnacionalnim dometom), koje će zatim izvršiti pritisak na druge države i relevantne međunarodne organizacije (kroz konceptualno uobličavanje date problematike i time motivisanje kolektivne akcije) (Risse & Sikink 1999, 20). Navedena dva modela razlikuju se po tome što „spiralni model” posmatra taj proces kao fluidan, odnosno proces koji se odvija kroz određeni broj faza koje idu napred i nazad; naime, ciljna država prvo u celokupnosti odbacuje ponudu (što rezultra novom rundom pritiska); zatim, država čini taktične ustupke (što rezultira novom rundom ciljnog pritiska); na kraju nastupa konzistentno državno ponašanje. Ono što je od najvećeg značaja u procesu napred-nazad, to je da svaka faza može rezultirati time što će ciljna država postati „socijalizovana” (odnosno, prilagodiće se željenim ponašanjima i normama) (20).¹²

U knjizi pod nazivom *Restructuring World Politics* [Restrukturisanje svetske politike], objavljenoj 2002. godine, Sandživ Hagram (Sanjeev Khagram), Džems V. Rajker (James V. Riker) i Ketrin Sikink idu u istom smeru kao *Transnational Social Movements and Global Politics* Smitove, Četfilda i Panjuka, nastojeći da ispituju uticaje transnacionalnih organizovanih društvenih pokreta na međunarodni sistem. Poput Smitove, Četfilda i Panjuka, Hagram, Rajker, i Sikinkova ograničavaju se na transnacionalne aktere koji su grupe za javno zagovaranje (međunarodne nevladine organizacije), pri tom zanemarujujući velike međunarodne organizacije koje posmatraju države kao članice (3-4). Hagram, Rajker, i Sikinkova u velikoj meri vode se sociološkom literaturom o društvenim pokretima, uključujući i koncept „analitičkih okvira” (Ibid, 12, 15-16), kada razmatraju sposobnost transnacionalnih aktera da dovedu do promena u međunarodnom sistemu. Autori smatraju da se te promene vrše bilo oslanjanjem transnacionalnih aktera na ustaljene „međunarodne norme” (tj. zajedničke standarde ponašanja koje je prihvatila većina aktera unutar međunarodnog sistema) da bi „ubedili” aktere izvan sistema da se povinuju odgovarajućem ponašanju, ili formulisanjem novih „međunarodnih normi” tamo gde ih nema (Ibid, 14-15). „Ubeđivanje” transnacionalni akteri postižu „upotrebom informacija, ubeđivanjem, moralnim pritiskom da doprinesu promenama u međunarodnim institucijama i vladi” (Ibid, 11).

¹² Ideja o primeni pravila kao iterativnom procesu vuče korene iz sociološko-pravnih nauka, iako Rise, Rop i Sikinkova ne citiraju relevantnu literaturu iz te oblasti. Videti *infra* § II(A)(1) za celokupnu diskusiju sociološko-pravne literature.

Activists Beyond Borders, *The Power of Human Rights*, i *Restructuring World Politics* direktno primenjuju složeni teorijski model koji je prezentovao Tomas Risse-Kapen sredinom 90-tih godina u delu *Bringing Transnational Relations Back In*, i kreću sa interdisciplinarnim pristupom proučavanju transnacionalnih aktera. Ipak, nijedno od ovih dela nije odmaklo dovoljno daleko. U *Activists Beyond Borders*, Kekova i Sikinkova ne razrađuju u potpunosti diskusiju o načinu na koji se sociološki koncept analitičkih okvira može u potpunosti primeniti u proučavanju transnacionalnih aktera. Slično tome, Risse, Rop i Sikinkova u *The Power of Human Rights* priznaju da primena pravila može biti iterativan proces, ali ne navode sociološko-pravnu literaturu koja je na to prvobitno ukazala 80-tih godina prošlog veka, niti razrađuju ovo zapažanje razmatranjem pitanja kako donošenje pravila može takođe delovati na isti način.¹³ Intuitivno se prihvata da istorijski institucionalizam¹⁴ dosta može doprineti analizi, ali osim što u navedenom delu autori usputno navode deo relevantne literature, izostaje potpuna primena postulata istorijskog institucionalizma (Risse & Sikink 1999, 16). Dok Hagram, Rajker, i Sikinkova u *Restructuring World Politics* razrađuju diskusiju i analizu načina na koji analitički okviri deluju da bi se mobilizovale transnacionalne koalicije,¹⁵ izostaje detaljni opis uloge koju institucije mogu (ali i ne ne moraju) igrati u ovom procesu. Skorija literatura o transnacionalnim odnosima nastavila je u istom pravcu (videti, npr. Bloodgood 2011; Ohanyan 2012; Widmaier & Park 2012; Kim 2013).

Interdisciplinarni pristup proučavanju transnacionalnih odnosa

Posmatranje interakcije između međunarodnog i nacionalnih sistema nije samo prerogativa onih koji izučavaju taj fenomen unutar transnacionalnih nauka u oblasti međunarodnih odnosa. Iako sebe ne nazivaju „transnacionalnim istraživačima“, sociološko-pravni teoretičari koji razmatraju interakciju između normi na međunarodnom i nacionalnom nivou, kao i politikolozi koji izučavaju posebni uticaj na institucije, imaju puno toga da kažu (i da doprinesu diskusiji) o tome kako

¹³ Videti *infra* 13. Takođe videti *infra* § II(A)(1) za celovito objašnjenje i pregled sociološko-pravne literature o nastanku, implementaciji i interakciji normi.

¹⁴ Videti *infra* § II(A)(2) za celovito objašnjenje i pregled literature o istorijskom institucionalizmu u političkim naukama.

¹⁵ Na ovom mestu vredi spomenuti i grupu sociologa koji su počeli da istražuju pitanje transnacionalnih aktera i koji, makar delimično, primenjuju koncept analitičkih okvira. Videti, npr. Smith 2002; Tarrow 2005; Della Porta & Tarrow 2005.

transnacionalni akteri deluju na državno ponašanje, kao i o metodama kojima se ovi uticaju mogu izmeriti. Interdisciplinarni pristup izučavanju transnacionalnih odnosa prezentuje ne samo novu, sistematičniju strukturu za istraživanje načina na koji transnacionalni akteri mogu uticati na državno ponašanje, već pokazuje da se proučavanje transnacionalnih aktera može vršiti iz perspektive više disciplina i upotrebom više metoda.

Sociološko-pravna literatura o formiranju normi i njihovoj interakciji kako unutar tako i između međunarodnog i nacionalnih nivoa, kao i pokret istorijskog institucionalizma u političkim naukama, u velikoj meri doprinese istraživanjima transnacionalnih odnosa. Sociološko-pravne nauke, koje ističu uzročne mehanizme koji rukovode interakcijom između međunarodnog i nacionalnih sistema, pružaju analitički pogodan i metodološki sistematičan način za izučavanje odnosa između ova dva nivoa. Slično tome, isticanjem načina na koji institucije posreduju i oblikuju interakciju, odnosno isticanjem značaja vremena i istorijske trajektorije u institucionalnoj izdržljivosti i dizajnu, istorijski institucionalizam pruža snažnu osnovu za izučavanje interakcija koje su u srcu transnacionalnih nauka.

Sociološko-pravna literatura o formiranju, primeni i interakciji normi

Posmatranje interakcije između međunarodnog i nacionalnih sistema nije samo prerogativa transnacionalnih nauka. Sociološko-pravne nauke, koje se takođe interesuju ovim problemom već neko vreme, došle su do korisnih empirijskih saznanja koja mogu doprineti proučavanju načina na koji transnacionalni akteri mogu uticati na državno ponašanje. Kao što je već rečeno, iako se u određenom delu novije literature iz oblasti transnacionalnih nauka došlo do istih uvida do kojih se došlo u sociološko-pravnoj literaturi (npr. primena pravila kao iterativni proces), to se desilo, naizgled, slučajno, bez navođenja ili analize prethodnih saznanja iz sociološko-pravne literature.¹⁶

Sociološko-pravne nauke (koje se još nazivaju „pravnom sociologijom” ili „pravom i društvom”) istražuju uticaj društvenih sila na pravo (Calavita 2010, 4). Umesto fokusiranja na interna pravila i doktrine koje oblikuju određenu doktrinalnu pravnu oblast, sociološko-pravnu literaturu umesto toga zanima kako pravo delimično može postati i društveni konstrukt i, time, doći u kontakt sa širim istorijskim i kulturološkim normama unutar društva (Ibid, 3-5). Sociološko-pravne nauke, dakle, po definiciji, pokrivaju široko polje istraživačkih tema. Istraživanje

¹⁶ Videti *supra* § 1(C)(2).

interakcije između međunarodnih i nacionalnih sistema već dugo je predmet interesovanja sociološko-pravnih nauka, iz čega je proizašao veliki broj raznih empirijskih nalaza. Sociološko-pravna nauka identifikovala je, vrlo precizno, nastanak normi, kao i uzročne mehanizme koji prate njihovu primenu, u nekoliko različitih problemskih zona.

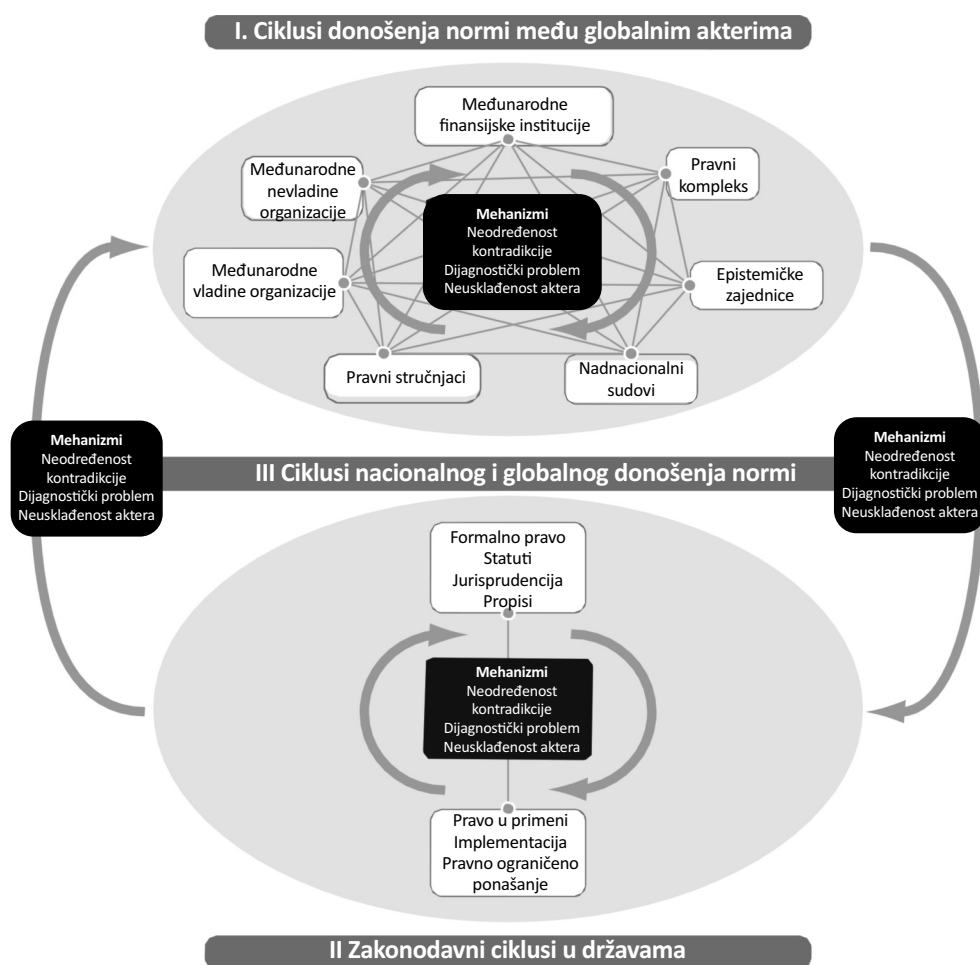
U radu iz 2005. godine koji proučava ljudska prava u Sjedinjenim Američkim Državama, Loren Edelman (Lauren Edelman) nalazi da pravne norme mogu biti endogene ili „proizvedene u onoj oblasti društva koju nastoje da regulišu” (“generated within the social realm that [they] seek to regulate”; 337-339). Umesto tradicionalnog pristupa koji pravne norme i organizacije koje one nastoje da regulišu posmatra kao odvojene (tj. pravo kao egzogeno organizacijama), Edelmanova posmatra norme i organizacije kao „isprepletene i međusobno konstitutivne” (“intertwined and mutually constitutive”; Ibid, 337). Takva, endogena veza moguća je u kontekstu američkog građanskog prava jer su zakoni široko i dvosmisleno formulisani, što znači da organizacije imaju dosta slobode u načinu na koji će se pridržavati tih zakona (Edelman 1992, 1532, 1536-1538; 2005, 337). S obzirom na navedeno, Edelmanova smatra da će se organizacije usmeriti ka onome što naziva njihovim „pravnim okruženjem” kako bi našle načina da se povinuju dvosmislenim zakonima o građanskim pravima (2005, 339). „Pravno okruženje” definiše se kao sastavljeno ne samo iz određenih zakona (i sankcija koje su u njih usađene), već i „društvenih normi” i percepcija koje su povezane sa njima. Drugim rečima, u pitanju je „široki skup pravila, normi, rutina i praksi koje oblikuju ne samo poslodavčevo shvatanje zakona i načina na koji se njima povinovati, već i njegovo shvatanje o tome šta je ispravno, pravično i pravilno” (1990; 2002, 194). Kada „praksa povinovanja” organizacija bude institucionalizovana, sudovi će, u slučaju da budu konsultovani, uputiti na tumačenje koje daju same organizacije, pošto sudovi navedenu institucionalizaciju posmatraju kao indikaciju „efikasnog” modela povinovanja (2002, 199-210; 2005, 350-351).

Polazeći od uvida do kojih je došla Edelmanova, Terens Halidej i Brus Karuters (Terence Halliday i Bruce Carruthers) ispituju kako se norme mogu razmeniti i preneti između, s jedne strane, transnacionalnih vladinih, kvazi-vladinih i nevladinih institucija unutar međunarodne zajednice kao celine, i, s druge strane, domaćih država. Prema Halideju i Karutersu, donošenje zakona i njihova primena, kako na sistemskom tako i nacionalnim nivoima, može delovati iterativno i rekurzivno (1135-1138). Akteri na međunarodnom i nacionalnim nivoima mogu doneti pravne norme koje se zatim mogu međusobno prelamati kroz egzogene procese kao što je ekonomska prisila, ubeđivanje kroz međunarodne institucije i univerzalne norme (koje mogu poslužiti kao modeli šta čini prihvatljivo ponašanje u međunarodnom i / ili nacionalnom sistemu) (Ibid, 1146-1148). Ove norme zatim mogu proći kroz

rekurzivne cikluse, na međunarodnom i nacionalnim nivoima, kao što formalno pravo („pravo u pisanoj formi“) prolazi kroz cikluse promene kada se interpretira i primenjuje („pravo u praksi“),¹⁷ prelamajući se napred-nazad između dva nivoa (Ibid, 1144, 1146-1147). Nije zagarantovano da će uvek doći do svih navedenih epizoda u rekurzivnim ciklusima, niti će se oni beskonačno ponavljati (Halliday 2009, 274). Epizode u rekurzivnim ciklusima rukovode se sa četiri uočljiva mehanizma: (1) pravnom neodređenošću (dvosmislenost koja je svojstvena statutima, propisima, i sudskim mišljenjima, koji vode mogućim nenameravanim posledicama njihove primene, što pokreće ponavljanje nacrti i primene) (Halliday & Carruthers 2007, 1149; Halliday 2009, 281-282); (2) kontradiktornostima (fenomen koji nastaje ideološki, kada sukob vizija kod različitih aktera dovede to nesavršenih pravnih rešenja, ili institucionalno, kada više institucija vrši pravnu primenu) (Halliday & Carruthers 2007, 1149-1150; Halliday 2009, 280-281)¹⁸; (3) dijagnostičkim sukobom (sukob između aktera u dijagnozi nedostataka u pravnim normama i identifikaciji korektivnih mera) (Halliday & Carruthers 2007, 1150-1151; Halliday 2009, 278-279); i (4) neusklađenošću aktera (neusklađenost do koje dolazi kada postoji disparitet između aktera koji učestvuju u procesu donošenja normi u određenoj problemskoj oblasti i onih na koje norme zapravo utiču; drugim rečima, akteri koje direktno pogađa implementacija novih normi nisu učesnici u njihovom nastanku) (Halliday & Carruthers 2007, 1150-1151; Halliday 2009, 277-278). „Pravna rekurzivnost“ konceptualizuje donošenje normi, iznad svega, kao „upotrebu sile“ i „borbu između konkurentskih aktera u globalnim arenama“ (Halliday 2009, 268-269). Epizode donošenja normi imaju početak (vreme 1), kada imamo sukobljene zahteve i konflikte, i kraj (vreme 2), kada ponašanje i očekivanja postaju „rutinski, uređeni i predvidivi“ od strane prihvaćenih, i, time, autoritativnih, normi (Halliday 2009, 274). Rekurzivne cikluse čini ono što se javlja između vremena 1 i vremena 2. Slika 1 prikazuje pojednostavljen prikaz pravne rekurzivnosti u akciji:

¹⁷ „Pravna rekurzivnost,“ po klasičnoj sociološko-pravnoj teoriji, podrazumeva da „uslovi donošenja zakona određuju primenu, a da uslovi prakse odlučuju koji će se zakon kodifikovati“. Videti Halliday 2009, 269.

¹⁸ Postoji ogromna literatura u javnom pravu o ideološkoj kontradiktornosti, naročito kada je u pitanju interakcija američkog Kongresa sa federalnim sudovima. Videti, npr. Melnick 1994; Eskridge 1994.

Slika 1: Pravna rekurzivnost u akciji¹⁹

Sociološko-pravne nauke uopšte, a posebno nova teorija pravne rekurzivnosti, detaljnim opisom procesa formiranja i primene međunarodnih i nacionalnih normi, kao i mehanizama koji upravljaju ovim procesom, daju nacrt za ispitivanje metoda kroz koje se vrši interakcija između međunarodnih i nacionalnih normi. Rigoroznost koju pravna rekurzivnost zahteva kako bi se razumeo proces formiranja međunarodnih / nacionalnih normi, ima potencijal da pruži bliže određenje za

¹⁹ Slika je reprodukcija grafikona iz Halliday 2009, 270.

utvrđivanje faktora koji trebaju da oblikuju uticaj transnacionalnih aktera koji manjka u trenutnom okviru inspirisanim Rise-Kapenovom okviru.

Literatura o istorijskom institucionalizmu u političkim naukama

Kao što se može videti, najsvežija literatura iz oblasti transnacionalnih nauka intuitivno prihvata da istorijski institucionalizam može da u određenoj meri doprinese ovoj poddisciplini, iako još uvek nije jasna forma tog doprinosa. Naime, iako Tomas Rise-Kapen u *Bringing Transnational Relations Back In* uopšteno upućuje na saznanja do kojih je došao pokret istorijskog institucionalizma kao na potencijalna sredstava za proučavanje odnosa između transnacionalnih aktera i domaćih struktura (20-21), on ne objašnjava šta se zapravo podrazumeva pod istorijskim institucionalizmom. Štaviše, ni on, ali ni njegovi saradnici ne pristupaju jasnoj primeni istorijsko-institucionalne analize u nekom od empirijskih poglavlja.

Istorijski institucionalizam „nije niti neka posebna teorija niti poseban metod“ (Steinmo 2008, 118), iako su ga mnogi autori pogrešno nazivali jednim ili drugim terminom. Istorijski institucionalizam je, zapravo, proces ili „pristup proučavanju politike i društvenih promena“ (“approach to studying politics and social change”), pri čemu se kao tipični metod za proučavanja ovih promena koristi studija slučaja (118). Ovaj proces razlikuje se od drugih po tome što se, nastojeći da da odgovore na empirijska pitanja, fokusira kako na istorijsku orijentaciju i trajektoriju ustanova, tako i na način na koji one mogu promeniti i oblikovati ponašanje (118). Istorija sama po sebi time postaje metodološko sredstvo primenom longitudinalne analize vremenskih perioda (tj. analizom vremenskih serija) kako unutar pojedinačnih slučajeva, tako i u više različitih slučajeva (Lieberman 2001, 1016-1023; Steinmo 2008, 122). Istorijsko-institucionalistička analiza pokušava da izmeri uticaj institucionalne „forme i konfiguracije“ na ishode (Lieberman 2001, 1012-1013). Značaj istorije u ovakvoj analizi ogleda se u tome što, kada se jednom ustanove, institucije mogu dugo potrajati i time uticati na ishode u dužem vremenskom periodu (1012-1013).

Istorijski institucionalizam, jedan od tri glavne grane koje su nastale iz „novog institucionalističkog“ pokreta koji se pojavio u političkim naukama i sociologiji 80-tih godina 20. veka (preostale dve su sociološki institucionalizam i institucionalizam racionalnog izbora), nastoji da objasni razlike u prioritetima raznih institucija u nacionalnim i transnacionalnim okvirima. Budući da se nalazi na sredini između tradicionalne definicije koja se orijentiše na strukturu, i one definicije koju nudi novi institucionalizam, koji se orijentiše na pravila i rutine (March & Olsen 1989), istorijski institucionalizam definiše institucije kao formalne organizacione strukture, ali i neformalna „pravila ponašanja“ koje „strukturišu“ donošenje odluka (Lieberman 2001, 1013). Istorijski institucionalisti žele da objasne kako i zašto slično ustanovljene

institucije mogu funkcionisati na potpuno različite načine, kako u domaćem kontekstu, tako i uporedno, u različitim državama (*videti*, npr. Thelen & Steinmo 1992). Prihvativši koncept ograničene racionalnosti, kako to objašnjavaju March i Olsen, i polazeći od raznih dominantnih tema, istorijski institucionalisti smatraju da su institucije ključne za oblikovanje prioriteta. To znači da institucionalne strukture imaju direktan uticaj na uslove i realnost političkih situacija, i time ostavljaju „sopstveni otisak na političke ishode“ (9). Istraživanje, međutim, prevazilazi institucije koje se izučavaju. Takođe se moraju razumeti i politički faktori koji utiču na strukture i autoritet pojedinačnih institucija i koji uspostavljaju svoje funkcije u širem sistemu, kako bi se u potpunosti razumeo institucionalni kontekst u kojem dolazi do nastanka i oblikovanja prioriteta (Ginsburg & Kagan 2005, 2). Institucije nisu samo klasične nezavisne ili eksplanatorne varijable, već pre deluju kao posrednici ili filteri koji oblikuju uticaje drugih nezavisnih varijabli (šta god one bile) (Lieberman 2001, 1012-1015). Samim tim, slične nezavisne varijable u nekoliko različitih slučajeva mogu proizvesti različite ishode ukoliko se date institucije razlikuju na bitan način (1012-1015). Stabilnost institucija (ili njeno odsustvo) bitna je jer, sa većom stabilnošću institucionalnih aranžmana, više se limitira i opseg različitih ishoda (1012-1015). Na osnovu ovih inovativnih uvida, u prošlim decenijama dolazi do brojnih politikoloških pionirskih istraživanja u okviru istorijskog institucionalizma (*videti*, npr. Weir 1992; Rothstein 1992; Pierson 2004; Thelen 2004; Steinmo 2010).

Kao proces koji posmatra politiku i društvene promene, istorijski institucionalizam i pridruženi metod studije slučaja mogu doprineti proučavanju transnacionalnih odnosa fokusiranjem na pitanje kako različite ustanove, na međunarodnom i nacionalnim nivoima, posreduju u ishodima i njihovom oblikovanju. Budući da ističe značaj istorije kao konteksta za proučavane varijable, kao i zbog toga što primenjuje studije slučaja gde se vrši longitudinalna analiza vremenskog perioda, što može pomoći u testiranju hipoteza o odnosima, istorijski institucionalizam pruža moćan korak napred ka proučavanju interakcija koje su u srcu transnacionalnih nauka.

Prednosti interdisciplinarnog pristupa proučavanju transnacionalnih odnosa

Interdisciplinarni pristup proučavanju transnacionalnih odnosa koji bi obuhvatio ne samo široki opus istraživanja u transnacionalnim naukama kao poddisciplini međunarodnih odnosa, već i sociološko-pravne radove na temu interakcije međunarodnih i nacionalnih sistema, kao i istorijsko-institucionalističke pristupe iz političkih nauka, predstavio bi ne samo novu, sistematičniju strukturu za istraživanje

načina na koji transnacionalni akteri mogu uticati na državno ponašanje, već i razumevanje da se proučavanje transnacionalnih aktera može vršiti kako iz perspektive raznih disciplina, tako i uz pomoć raznih pristupa. Kako se moglo primetiti, objavljivanjem *Bringing Transnational Relations Back In* 1995. godine, otpočet je proces kroz koji su uglavnom autori iz oblasti međunarodnih odnosa, koji su inače tipično vršili istraživanja u transnacionalnim naukama, pokušali da prošire poddisciplinu izvan stare državno-centrične / društveno-centrične debate i krenu sa radom na pitanju *kako* transnacionalni akteri *mogu uticati* na državno ponašanje i obrnuto. Iako je predstavljeni novi teorijski okvir puno obećavao, da bi se uspelo u planiranom, mora doći do njegove izgradnje i usavršavanja kako bi se poboljšalo ovo nedovoljno adekvatno objašnjenje ponašanja transnacionalnih aktera.

Svi novi modeli za proučavanje transnacionalnih odnosa moraju obratiti pažnju na glavni nedostatak Rise-Kapenovog teorijskog okvira, a to je neodređenost. Neodređenost se može uočiti još kod nemogućnosti ovog teorijskog okvira da rigorozno identifikuje glavne nezavisne varijable za izučavanje načina interakcije između međunarodnih i nacionalnih normi, kao i tehnike kojima se posledice te interakcije mogu meriti. Mogućnost merenja je od ključnog značaja jer, bez obzira što je ovaj okvir inovativan u svom fokusu na proizvođenju hipoteza, kao i dualističkoj analizi načina na koji transnacionalni akteri utiču na državno ponašanje na sistemskom / nacionalnom nivou, Rise-Kapenov teorijski okvir ponašanja transnacionalnih aktera pati od niza problema sa merenjima koje se baziraju na neuspehu da sistematično operacionalizuje nezavisne varijable koje navodi. Da se podsetimo, u *Bringing Transnational Relations Back In*, Rise-Kapen predstavio je sledeće nezavisne varijable za izučavanje *kako* transnacionalni akteri *mogu uticati* na državno ponašanje:

Slika 2: Nezavisne varijable koje je identifikovao Rise-Kapen u Bringing Transnational Relations Back In

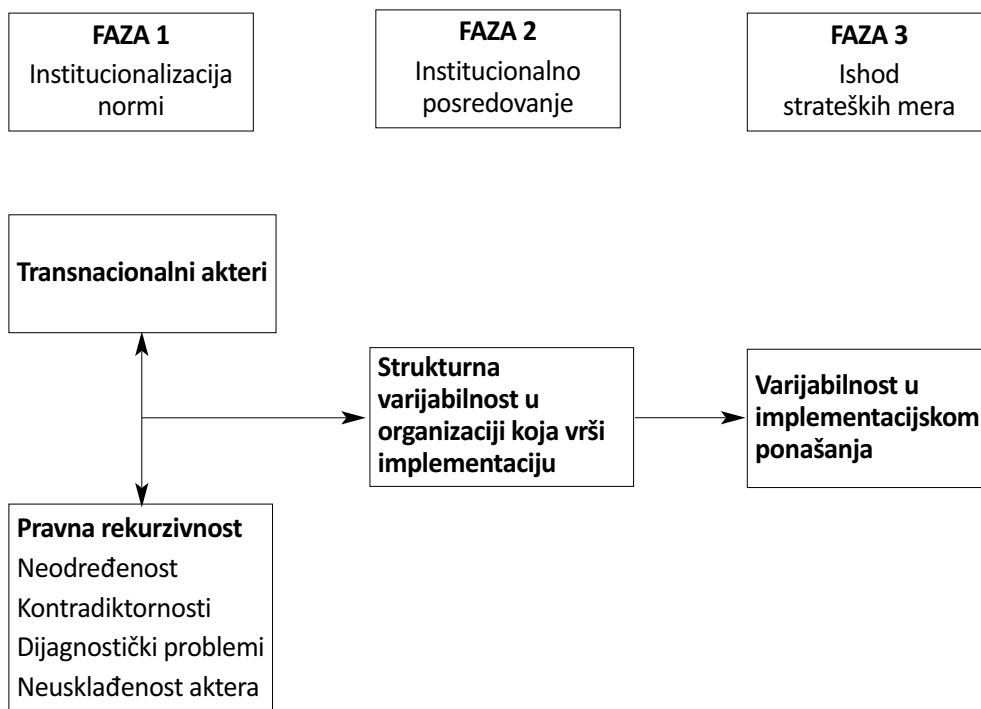
NEZAVISNE VARIJABLE:	ZAVISNE VARIJABLE:
<ul style="list-style-type: none"> • Varijacija u stepenu međunarodne internacionalizacije u pogledu strateških mera koje se zagovaraju (tj. opseg i stepen međunarodne regulacije, međunarodnih ugovora, režima, itd. koji upravljaju tom strateškom oblašću). • Varijacija u sastavu domaćih struktura države na koju se planira vršenje uticaja (tj. političkih institucija na vrhu države, društvenih struktura civilnog društva na dnu, kao i strateških mreža koje ih povezuju). 	<ul style="list-style-type: none"> • Varijacija u strateškom uticaju transnacionalnih aktera na domaću državu na koju se planira vršenje uticaja.

Saznanja o interakciji međunarodnih i nacionalnih normi do kojih se došlo u socio-pravnoj literaturi, a naročito empirijska istraživanja Terensa Halideja i Brusa Karutersa, u kojima se ističe fenomen pravne rekurzivnosti, predstavljaju smernice ka operacionalizaciji i sistematskom testiranju fenomena koji Rise-Kapen označava kao „međunarodna institucionalizacija.“ Ova, prva varijabla u Rise-Kapenovom okviru (označena kao stepen, ili odsustvo, međunarodne regulacije, međunarodnih ugovora, i režima koji rukovode određenim problemskim područjima) analogna je razlikama koje Halidej i Karuters opisuju između početaka epizode proizvođenja normi (vreme 1), kada se javljaju suprotstavljeni zahtevi i konflikti, i kraja (vreme 2) tih epizoda, kada su ponašanje i očekivanja postali „rutinski, uređeni i predvidivi“ na osnovu prihvaćenih, a samim tim i autoritativnih normi. Pravna rekurzivnost (kojom upravljaju četiri mehanizma koja Halidej i Karuters identifikuju²⁰) predstavlja ono što nastupa između vremena 1 i vremena 2. Prednost ovog pristupa je u tome što ne samo da omogućava identifikaciju suprotstavljenih nasuprot razrešenih normi (u određenim problemskim oblastima), već i omogućava i istraživanje samog procesa u kojem norme mogu biti osporene (vreme 1 rekurzivnog ciklusa) do vremena u kada postaju ustanovljene (vreme 2 rekurzivnog ciklusa), kao i posledice koje takvi ciklusi mogu imati na sposobnost transnacionalnih aktera da utiču na domaću politiku.

Potpunim i jasnim korišćenjem istorijskog institucionalizma u proučavanju transnacionalnih odnosa, može se u velikoj meri razumeti način na koji druga varijabla, koju Rise-Kapen naziva „varijacijom u strukturama na nacionalnom nivou“, utiče na sposobnosti transnacionalnih aktera da utiču na državno ponašanje. Preusmeravanjem fokusa na izučavanje specifičnih *institucija* i načina na koji one vrše posredovanje kod transnacionalne politike, umesto na trenutno skeniranje sistemskog nivoa gde se „domaće strukture“ posmatraju kao intergrisane celine, opseg opservacija (N) za određenu studiju se može proširiti, a određeni odnosi bolje identifikovati. Značaj institucionalne strukture i vremena koji prožimaju radove iz oblasti istorijskog institucionalizma (*videti* Lieberman 2001; Pierson 2004.), kao i snaga metoda studije slučaja u testiranju hipoteza, predstavljaju nova sredstva za testiranje značaja institucija za sposobnost (ili neuspeh) transnacionalnih aktera da utiču na državno ponašanje. Slika 3 ispod daje prikaz nezavisnih i posredujućih varijabli u „interdisciplinarnom okviru za proučavanje transnacionalnih odnosa“:

²⁰ Tj. kao što je ranije navedeno, ovi mehanizmi su: (1) pravna neodređenost, (2) kontradiktornost, (3) dijagnostički problemi i (4) neusklađenost aktera.

Slika 3: Interdisciplinarni okvir za proučavanje transnacionalnih odnosa



Interdisciplinarni okvir za proučavanje transnacionalnih odnosa predstavlja sredstvo za postizanje rigorozne, sistematičnije operacionalizacije varijabli koje rukovode izučavanjem odnosima, kao i sredstvo za jasnije određenje niza procesa koje utiču na sposobnost transnacionalnih aktera da utiču na domaću državnu politiku. Kao što se moglo videti, socio-pravna literatura opisuje prirodu procesa formiranja normi i njihove interakcije kao iterativnu, gde može doći do rekurzivnih ciklusa koji upravljaju preobražajem sukobljenih normi u razrešene. U literaturi se jasno opisuju mehanizmi koji upravljaju tim ciklusima. Ova saznanja pružaju jasne prednosti izučavanju načina na koje transnacionalni akteri mogu usvojiti ove norme (bile one međunarodne ili nacionalne po prirodi / poreklu), a zatim ih koristiti za ciljano dejstvo unutar domaćih država (faza 1 u okviru). Isto tako, istorijsko-institucionalistički pristup, koji ukazuje na to da institucije ne samo posreduju u ishodima, već i oblikuju opredeljenja (faza 2 u okviru), nudi jasan put napred ka proučavanju načina na koji određeni slučajevi institucionalnog dizajna mogu uticati na sposobnost transnacionalnih aktera da utiču na državno ponašanje (faza 3 okvira), kao i razvoj ovih procesa kroz vreme.

Faza 1 okvira zatim analizira prirodu normi koje transnacionalni akteri usvajaju a zatim koriste za ciljano dejstvo unutar država. Jesu li ove norme podređene sukobljenim tvrdnjama i konfliktima po pitanju njihovog značenja i primene ili su one poprimile status prihvaćenih i / ili autoritativnih? Drugim rečima, da li rekurzivni ciklusi još traju (time ukazujući na konflikte po pitanju primene i značenja), ili su ti ciklusi razrešeni i okončani (što ukazuje na njihovo prihvatanje u smislu primene značenja)? Faza 2 u okviru posmatra kako dizajn institucija kroz koje se filtriraju prilikom njihove primene utiče na norme i kako ovo može pojačati ili ublažiti uticaj transnacionalnih aktera. Faza 3 okvira testira uticaj transnacionalnih aktera posmatranjem njihovog uspeha / neuspeha u primeni odabranih ishoda strateških mera na ciljane države kroz date norme.

Zaključak

U ovom radu predstavljen je interdisciplinarni okvir za proučavanje transnacionalnih odnosa koji se oslanja na prethodna istraživanja u oblasti međunarodnih odnosa, sociološko-pravnih nauka i političkih nauka. Dati okvir ima za cilj da ispita način na koji transnacionalni akteri utiču na državno ponašanje. Potreba za novim modelom za razmevanje ponašanja transnacionalnih aktera je pravovremena i neophodna. Postojeća literatura o „transnacionalnim naukama” u međunarodnim odnosima previše je neodređena kada je reč o opisu faktora koji utiču na sposobnost transnacionalnih aktera da utiču na državno ponašanje. Upravo je nedovoljna određenost dovela do neadekvatnog objašnjenja značaja transnacionalnih aktera i niza problema sa merenjem zbog preoširnosti koncepta.

Novi okvir koji je predstavljen u ovom radu polazi od doprinosa postojeće literature o „transnacionalnim naukama” u međunarodnim odnosima, ali se služi i literaturom iz sociološko-pravnih nauka i političkih nauka kako bi ispravio problem nedovoljne određenosti. Kada je u pitanju literatura iz oblasti tradicionalnih transnacionalnih odnosa u međunarodnim odnosima, predloženi interdisciplinarni okvir takođe pridaje veliki značaj proučavanju načina na koji transnacionalni akteri utiču na državno ponašanje. Takođe, u velikoj meri vrednuje se i značaj koji opseg i domet međunarodnih institucija, kao što su npr. propisi, međunarodni ugovori ili režimi koji upravljaju određenim strateškim oblastima, mogu imati na potencijalni uspeh (ili neuspeh) transnacionalnih aktera kod vršenja uticaja na promenu domaćih strateških mera. Iz sociološko-pravnih nauka koje izučavaju interakciju između normi na međunarodnom i nacionalnim nivoima, ovaj interdisciplinarni okvir usvaja shvatanje da je priroda formiranja normi i njihove interakcije iterativna. Konačno, iz

politikoloških pristupa istorijskom institucionalizmu ovaj interdisciplinarni okvir usvaja shvatanje da institucije mogu ne samo posredovati u ishodima već i oblikovati prioritete. Povezujući sva navedena shvatanja, predloženi novi interdisciplinarni okvir: (1) eksplicitnije identifikuje niz varijabli koje utiču na sposobnost transnacionalnih aktera da utiču na domaću državnu politiku, i (2) detaljnije objašnjava i precizira proces kojim se pokušava izvršiti uticaj, kroz uvođenje konkretnijih koncepta (koji polažu značaj na rekurzivnu prirodu formiranja normi i značaja institucionalne strukture u uticaju na ishode).

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**TRANSNATIONAL RELATIONS AND WORLD POLITICS:
NEW APPROACH**

Abstract: The past forty years has seen a marked increase in the proliferation of transnational actors in the international system. The rise of these actors has sparked a continuing debate within the field of international relations on how they influence state action. This emergent literature on “transnational studies” within international relations has mainly pitted advocates of an approach that views states as the dominant force in world politics versus those who see the rise of transnational actors as empirical proof that the primacy of states as actors in the international system is being replaced. New literature in the mid-1990s tried to move transnational studies beyond these debates of the past. What both sides failed to grasp was that, because both looked to *how* transnational actors *could affect* domestic state behavior, they really in the end shared the same research question (it was only their approach to the question that differed). The result is a thin account of how transnational actors matter and a series of measurement problems due to the underlying concepts being much too general. This article introduces a new theoretical framework for testing the ability of transnational actors to influence domestic state behavior.

Keywords: transnational actors, state-centered, society-centered, inter-disciplinary, legal recursivity.

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Serbia's foreign policy and relations with Russia as one of the priorities

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Abstract: Although Republic of Serbia (Serbia) does not have an adopted foreign policy strategy, there are a number of elements that are consistently applied. One of them is the insistence on prioritizing cooperation with Russia. Serbian-Russian relations have become stronger and deeper over the past 20 years, and they are unlikely to be impacted by changes in the global environment that occur after February 2022. This paper tackles the subject of continued Serbian-Russian relations and their dynamics, in addition to analyzing the development of Serbia's foreign policy and explaining how relations with Russia became a priority. The analysis of the bilateral relations between the two states is done by relying on structural realism as a theoretical framework, first of all on considering the principle of self-help as one of the key factors when determining foreign policy. The methodological framework is based on discourse analysis, content analysis, but also the use of the comparative method, induction and deduction methods.

Keywords: foreign policy of Serbia, Russia, NATO, EU, Kosovo and Metohija.

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Elements of the Serbia's foreign policy after 2008

The Republic of Serbia does not have an adopted strategy that explicitly refers to foreign policy. On the one hand, there is a banal explanation for this, often heard during discussions: politicians do not like restrictions! If such a strategy were to be defined and adopted, then obligations for the holders of the most important state positions (President of the Republic, Prime Minister, Minister of Foreign Affairs, etc.) would be implied. However, on the other hand, in addition to this banal, there is also a rational explanation. That explanation concerns the very complex position of Serbia in international relations. Serbia's foreign policy is also determined by the "Kosovo issue". Even though the status of Kosovo and Metohija was defined by Resolution 1244 (1999) of the UN Security Council, which meant negotiations between Belgrade and Pristina on essential autonomy (these negotiations were organized in 2006 under the auspices of the UN and under the leadership of Marti Ahtisaari, the special envoy of the UN Secretary-General, in 2007, relying on the concept of "three NOs" adopted by the Contact Group, which meant: no return to the status from before 1999; no division of Kosovo; and no annexation of the territory of Kosovo to another state — meaning Albania), the representatives of Kosovo Albanians unilaterally declared independence in February 2008 with the support of the US and key Western European countries (Germany, Great Britain, and France) (Proroković 2013, 148–161). Before that, in October 2004, the National Assembly of the Republic of Serbia adopted a Resolution on joining the European Union. The text of the resolution states: "full agreement on joining the European Union as the highest and indisputable political priority and on inclusion in the Partnership for Peace Program as an element of the common security structure of European countries; full agreement on further improvement of good neighborly relations and all other types of regional cooperation and regional initiatives; the obligation of the National Assembly to prioritize work on harmonizing domestic legislation with the legal acquis of the European Union; the necessity of drafting the National Strategy of Serbia for the accession of Serbia and Montenegro to the European Union, which will determine the current situation in Serbia in areas important for EU accession, analyze the conditions for accession set by the EU and determine the sequence and deadlines for undertaking the necessary measures and activities" (Rezolucija o pridruživanju Evropskoj uniji, 2004).

Thus, Serbia's process of EU integration began four years before the so-called "Republic of Kosovo" unilaterally declared its independence, which has been a very difficult position to hold since 2008 in terms of foreign policy practice. Taking a step back and breaking all previously established agreements with the EU could have a disastrous effect on both the economic processes in the country and the country's

political position. Besides, the fact that Serbia is *de facto* in the EU and/or NATO environment is an aggravating circumstance. An actor's foreign policy is highly influenced by its geographic position, particularly when it comes to small states.

Accepting the position of the collective West (in this context of the overwhelming majority of the EU members, since Spain, Greece, Cyprus, Slovakia, and Romania did not accept this decision of the Kosovo Albanians) on "Kosovo's independence" was out of the question for several reasons. Such a step would not only affect collective confidence and hurt the dignity of the Serbian population in the post-Yugoslav area, but would also have very concrete long-term political consequences. This would significantly worsen the country's geopolitical situation and imply acceptance of the Western narrative regarding the causes of the Yugoslav civil war (the central tenet of which is that Slobodan Milošević's aggressive hegemonic policy caused the country's disintegration and the outbreak of the civil war), thus legitimizing and legalizing (through the highly contested rulings of the Hague Tribunal, but also likely other international courts) individual punishment of Serbian politicians and officers, and collectively stigmatizing the Serbian people as a whole (Proroković 2013).

Severing the previous relations with the EU was not only unprofitable and risky, but it was also untenable to accept the EU's position on Kosovo's status (or more precisely, of the convincing majority of the EU members, including all the key ones except Spain). It should be noted that, at the time, non-Western actors' relative interest in Serbia's position was low despite their professed support, particularly that of Russia and China, who are permanent members of the UN Security Council. Although they supported Serbia's position in the UN Security Council and other international forums, Russia and China, quite understandably, were not ready to risk or spoil their relations with Western countries to the extreme because of the Kosovo case. Support for Serbia was justified by the necessity to preserve the principles of public international law and adhere to the UN Security Council Resolution of 1999. Therefore, Serbia found itself in an "impossible environment". Cooperation with the EU and NATO countries was a "geographical necessity" (also an economic and infrastructural necessity, since the majority of investors came from the EU, the majority of Serbian exports are traditionally oriented towards the EU and neighboring countries, and loans for infrastructure development are secured through arrangements with Western banks and financial institutions), while at the same time it had to rely on the support of Russia and China regarding Kosovo. Since 2008, the collective West has been exerting constant pressure on Serbia to "recognize Kosovo" before it can join the EU. This pressure has been present in both overt and covert messages. Sometimes that pressure was stronger, sometimes weaker, sometimes those messages were more frequent and sometimes less

frequent, sometimes they were brutal and sometimes milder, but the fact is that this process has been going on for a decade and a half. The EU formalized and institutionalized this approach by adding Chapter 35 to Serbia's accession negotiations (Serbia is the first country in the history of EU integration to have the well-known Chapter 35). This Chapter is specific and contains a mechanism for monitoring the implementation of agreements reached within the dialogue between Belgrade and Pristina. This is determined by the EU's Negotiating Framework for conducting accession negotiations with Serbia, which states that the issue of the normalization of relations between Serbia and Kosovo will be considered within Chapter 35 *Other issues* as a separate item that should be dealt with in the early phase of the negotiations, as well as during of the entire negotiation process, and in particularly justified cases also within other relevant chapters. This means that within Chapter 35, there will not be a discussion on topics that are the subject of the dialogue between Belgrade and Pristina, but on the implementation of the agreements reached within the dialogue between Belgrade and Pristina (Zajednička pozicija Evropske unije. Poglavlje 35: Ostala pitanja, 2015, 2–5).

Then, how is foreign policy articulated? First, in December 2007, when it became crystal clear that the negotiations under the leadership of Martti Ahtisaari were orchestrated and that his final proposal would be "conditional independence of Kosovo" (which should grow into unconditional independence over time), and when it became even more obvious that the US was leading that course with the help of Germany, Great Britain, and France, at the proposal of the then Prime Minister Vojislav Koštunica, the National Assembly adopted a document called the Resolution of the National Assembly on the Protection of the Sovereignty, Territorial Integrity and Constitutional Order of the Republic of Serbia. Point 6 of this Resolution reads: "Due to the overall role of NATO, from the illegal bombing of Serbia without a decision of the UNSC to Annex 11 of the rejected Ahtisaari plan, in which it is determined that NATO is the "final authority" of the government in "independent Kosovo", the National Assembly passes the decision to declare the military neutrality of the Republic of Serbia in relation to the existing military alliances until the eventual calling of a referendum at which the final decision would be made on the matter" (National Assembly of the Republic of Serbia 2007a, 2). The role of Prime Minister Koštunica was deliberately highlighted, not only because of the text of the Resolution, but also because he very skilfully managed to secure almost unanimous support for this document in the parliament (220 MPs voted for, 14 against, and 3 abstained) (National Assembly of the Republic of Serbia 2007b).

The decision to maintain military neutrality was vigorously criticized in the pro-Western media, but this only meant that it had the support of the major political

parties and would not be altered even if the parliamentary majority changed. The message was clear: Serbia remains interested in EU membership, but is not interested in becoming a NATO member! Given that all Eastern European countries were required to join NATO before joining the EU, this effectively meant that Serbia continued its process of European integration but would likely never formally join the EU. *The modus vivendi* was: we are not giving up on European integration, even though it is possible that Serbia will never become a member of the EU! It was not opportune for the EU to announce something like that, and some EU members refused to establish bilateral relations with Pristina, which prevented a consensus on the “Kosovo case” from being reached (part of the members who accepted the “game of the collective West” kept their stance that Serbia should continue European integration because it is important for regional security; in this respect, Italy particularly stood out).

The second step in shaping foreign policy was President Boris Tadić’s idea of “four pillars of the foreign policy of the Republic of Serbia” from August 2009. Those four pillars are: the EU, the US, Russia, and China. President Tadić explained: “I believe that today Serbia has completed its foreign policy doctrine. At the beginning of the 21st century, the world experienced two significant changes. First, we had the unequivocal dominance of the US and the rounding of the EU economic space and the emergence of a new European currency. The second change came after the world financial crisis, when China clearly emerged as the future world economic leader. Meanwhile, before the onset of the world economic crisis and due to the rise in oil and natural gas prices, Russia renewed its economic and foreign policy potential and was a great friend in supporting Serbia in defending the integrity of our country in Kosovo and Metohija, which unequivocally led us to particularly close relations with Russia, in addition to historical friendship” (Tadić 2009).

Serbia has chosen the concept of strategic balancing. “The aforementioned four countries have different positions on the issue of Kosovo and Metohija, on the issue of national sovereignty in general, different interests in the region, and varying foreign policy goals. Serbia has a strategic goal of joining the European Union and maintaining its territorial integrity (Kosovo and Metohija within Serbia). It also proclaimed a policy of expanding foreign trade (both in terms of increasing the number of trading partners and in terms of increasing the volume of exports) and especially strengthening relations with China and Russia” (Gajić & Janković 2012, 175). Again, this doctrine was not formalized nor translated into a concrete document, but it began to be applied. Based on it, the door was “opened” for the institutionalization of a completely new type of relationship with Russia and China (which will be reached on a larger scale in the coming years).

By developing the concept of military neutrality and the idea of four pillars of foreign policy, it came to the point that in the Defense Strategy of the Republic of Serbia from 2019, NATO and the Collective Security Treaty Organization (CSTO) were completely equated as partners with which it is necessary to cooperate (in points 4.5 and 4.6, every mention of NATO is followed by a mention of the CSTO). The introductory part emphasizes: "The determinations expressed in the Defense Strategy express the determination of the Republic of Serbia to build and strengthen its own capabilities and capacities for defense in accordance with the decision on military neutrality, as well as to strengthen national, regional, and global security through cooperation with security and defense structures of the European Union, participation in the Partnership for Peace Program, cooperation with the Collective Security Treaty Organization, and other international security and defense entities" (Strategija odbrane Republike Srbije, 2019).

In the National Security Strategy, also adopted in 2019, the assessment is underlined: "Progress in the Republic of Serbia's accession to the European Union has a positive effect on its political, economic, and social stability. The development of partnership cooperation between the Republic of Serbia and NATO, based on the policy of military neutrality and through the "Partnership for Peace" Program, as well as an observer position in the Collective Security Treaty Organization (CSTO), contributes to the stability of the Republic of Serbia. In order to further develop democracy, stability, and prosperity in the region, the improvement of relations with the United States, the Russian Federation, and the People's Republic of China, as well as with other traditional partners and significant factors in the international community, is significant for the Republic of Serbia" (Strategija nacionalne bezbednosti Republike Srbije, 2019).

This framework will be used by Aleksandar Vučić (first the Prime Minister, and then the President of the Republic of Serbia) to concretize relations with Russia and develop relations with China to unprecedented proportions. In the absence of "financial support" from the West, partially due to the consequences of the great economic crisis (2008-2009), which had a devastating effect on the Balkan economies in the period from 2010 to 2014, and partially because of the "dosed support" of Western financial institutions to the Republic of Serbia, which was constantly conditioned and reminded of "obligations regarding Kosovo", official Belgrade turned to Beijing. Contrary to the original plans (Beijing recognized Poland, the Czech Republic, Hungary, and Romania as key partners in Central and Eastern Europe when designing the concept of the Belt and Road and the 16+1 format), China readily accepted this possibility, and thus, in just a few years, Serbia, along with Hungary, became a "geo-economic supporter" for the expansion of Chinese influence in Southeast Europe. In the period from 2012 to 2019, Chinese companies

and banks invested in or lent Serbia about 10 billion dollars. The Chinese were involved in large projects - construction of highways, high-speed railways, energy infrastructure, and greenfield investments (the largest single investment of this type in the recent history of Serbia is that of the Chinese tire production company Linglong, in the city of Zrenjanin, worth approx. 1 billion dollars) (Zakić 2020, 45-71). Of particular importance is the fact that Chinese companies, in agreement with the Government of Serbia, took over (through the purchase of part of the ownership based on special interstate agreements) two “economic giants”: *Mining and Smelting Basin Bor* (exploitation and production of copper as a priority business and precious metals as a secondary activity; in 2018, the majority ownership of this mining and smelting basin was acquired by the company Zijin) and *Smederevo Ironworks* (the Chinese HBIS group became the owner in 2016). In order to maintain the technological process, these two companies, which had been operating at a loss for years, received subsidies from the state budget. During those years, strategic partners were sought. By 2021, these two companies became the two largest exporters, creating employment for tens of thousands of people.

In addition to cooperation with the EU, which is an “economic necessity”, during the first mandate of President Vučić, cooperation with China became an “economic inevitability”. This was partly because of China’s strategy, partly because of the difficulties roiling the EU, which made the Balkans receive less attention than in previous years, and partly because of Serbia’s active foreign policy. The EU and the US began to be concerned about this change in the situation in Serbia, but Western actors would not begin to pay more attention to the Chinese presence in Serbia until 2021. Up until that point, they had been solely concerned with monitoring and limiting “Russian malignant influence” (since 2014 and the first escalation of the Ukrainian crisis).

In general, Serbia’s unwritten foreign policy strategy continues to prioritize relations with China and Russia, and its cooperation with these two major countries has grown and deepened over time. This is an absolute precedent in Europe at the beginning of the 21st century. Excluding to some extent the examples of Hungary and Moldova, whose foreign policy positioning has some similarities but also significant differences with the case of Serbia, the other countries of Eastern Europe (not counting Belarus, of course) followed the “well-trodden path” – first membership in NATO, then unconditional membership in the EU with the acceptance of a common foreign and security policy, which meant first “squeezing out and limiting” Russian influence and then a sharp confrontation with Russia (since 2014 and the fight against “Russian malignant influence”), as well as carefully establishing communication with China, which has started to be restrained and prevented since Donald Trump’s election as the President of the US. However, the

other Eastern European states did not have the “Kosovo case” or a history of hostile relations with the collective West. Serbia’s position in international relations has become complex as a result, but also its foreign policy has become unique. At least on a European scale.

Relations with Russia as the Republic of Serbia’s foreign policy priority

From a historical perspective, Russian-Serbian bilateral relations were good. Both Russia’s role in organizing Serbian uprisings against the Ottoman Empire at the beginning of the 19th century and the help provided in the Serbian-Turkish wars of 1876-78, the two Balkan wars at the beginning of the 20th century, and in the First World War, shaped the collective consciousness and politics of memory in both nations (Terzić 2012; Terzić 2011, 95–107; Babac 2014). This was certainly influenced by the religious vertical, i.e., the closeness of the two Orthodox nations. Even in that period, there were ups and downs during the formation of bilateral communication (a particularly critical moment was the Peace of San Stefano and the subsequent events at the Berlin Congress), but from today’s perspective, the main course of those relations played out positively. Larger “turns” occurred during the existence of the Soviet Union and Yugoslavia, since Soviet-Yugoslav relations did not even remotely resemble the previously established Russian-Serbian ones. In the interwar period, the Kingdom of Yugoslavia remained a “bastion of anti-communism”, partly because a huge number of Russian emigrants, the White Guards, settled in Serbia. Their influence was great in various intellectual circles in Belgrade and was transmitted to both culture and politics. However, the most important reasons are first of an ideological nature and, second, the binding of the newly created Yugoslav state to alliances with France and Great Britain, because the fear of revisionism of the defeated forces in the First World War weighed on foreign policy. The Kingdom of Yugoslavia was the last European country to establish relations with the Soviet Union (June 1940) (Petrović 2017). It seems absurd, but the socialist Yugoslavia, which was created after the Second World War with the help of the Soviet Union, was the first Eastern European country that “escaped” from the alliance with the USSR (June 1948) (Gibijskij 2011, 567–594). Nikita Khrushchev’s official visit to Belgrade in 1955 marked the end of the “stage of hostility” and the formal beginning of bilateral cooperation for “mutual benefit”. Josip Broz was in conflict with Stalin (and vice versa – Stalin did not trust Broz at all). Khrushchev carried out “de-Stalinization” on the internal level, and thus there

was an “implicit explanation” of who was “guilty” in the dispute between the two communist states. But the causes of the crisis in bilateral communication were much deeper and of a completely different character. Being socialist in its internal structure, Yugoslavia’s foreign policy orientation was more towards the “political West” than the “East”. It served as a kind of geopolitical instrument for “undermining the communist bloc” and its positioning in the international arena, even if informally, had to have elements of anti-Soviet activities. It was not emphasized in the foreground, it was not officially presented as a state orientation, it was not always and everywhere visible, but it “disturbed” bilateral communication between Belgrade and Moscow and contributed to a relatively low level of trust in that relationship. (Edemsky 2011, 661 – 682).

The disintegration of both “superstates” and a return to the “old Russian-Serbian framework” in the 1990s therefore represents a kind of “turning of the page”, the beginning of a new era in relations between Moscow and Belgrade. Every beginning is difficult, and all attempts to raise the level of trust were especially difficult in the conditions that existed in the 1990s, when both Russia and Serbia faced numerous internal problems, and when the world political system was unipolar, with the distinct dominance of the US in every respect.

The Serbian leadership had high and frequently unreasonable expectations of Russia during those years because Moscow too had to implement the idea of strategic balance with regard to the US. Going through the traumatic post-Soviet experience, Russia tried to regulate its own relations with the US (and with the “Western world” as a whole) through cooperation, which inevitably reflected on official Moscow’s view of the Balkan issue (the position was defended by political means, most often with reliance on international law and the threat of using a veto in the UNSC to prevent unfavorable outcomes). A similar rhythm continued during the first presidential term of Vladimir Putin. However, the ongoing improvement in Russian-Serbian relations started in 2006. The improvement was noticeable in the military, economic, and political fields. Putin’s famous speech at the 43rd Munich Security Conference in 2007 (*Münchner Sicherheitskonferenz*) is most often cited by Western analysts as a “foreign policy turn” or a “show of ambition” for Russia to pursue a different policy (Kupiecki & Menkiszak 2020, 369–379). In other words, by reading “between the lines”, the aspiration of Russia to become a separate pole in international relations was announced. Therefore, with its activities, Russia wanted to influence the transformation of the structure of the world political system from unipolar to multipolar. Those changes in Russia’s approach were detected in relation to Serbia a few months earlier. This was once again influenced by the “Kosovo case,” as Russian support for Serbia’s position grew during the course of the discussions between Belgrade and Pristina, led by

Martti Ahtisaari, as it became clearer where the entire process was headed and how it should conclude. Finally, through diplomatic action and with the threat of a veto, during the summer of 2007, Russia prevented the US from putting the text of a new resolution on Kosovo on the agenda of the UN Security Council, which would repeal the previous Resolution 1244.

Trust in bilateral relations was growing, and over time, the prevailing opinion in Belgrade was that Serbia could rely on Russia to defend its territorial integrity. This opinion was also influenced by the attitude of the Serbian public, which was becoming extremely pro-Russian. It turned out that the "political necessity" to cooperate with Russia more closely and public pressure on political circles had more of an impact on Serbia's foreign policy orientation than the investments made by the collective West in the media, non-governmental organizations, and political parties, which also temporarily increased mistrust between Russia and Serbia. This phenomenon of the growth of Russophilia in the Serbian public is, by all accounts, special and requires a separate analysis. In this paper, it is cited as a fact which has largely determined Serbia-Russia relations. This also affected energy, economic, and military cooperation „In May 2013, Belgrade and Moscow signed the document with pretentious name 'Declaration of Strategic Partnership between Serbia and Russia'. The document states that strategic relations 'include all spheres of cooperation, including politics, trade, economy, culture, technic and education'. Still, even after this, the two biggest contracts between the two countries remained those related to energy and railway infrastructure. The scope of foreign trade exchange has been fluctuating from 2.3 to 3.3 billion euros for the past six years, with the share of oil and oil derivatives in Russian exports to Serbia at 36%, gas 27%, and about 20% is import of other necessities (products and services) related to the energy sector. When it comes to Serbian exports, apples make 9%, cheese 2%, strawberries 2% (all three products are among the top ten), and the share of the other agricultural products is about 10%" (Proroković, 2020, 202).

"The originally considered route for 'South Stream' stretched from Bulgaria to the north, through the territory of Romania to Hungary, but it was changed so that Serbia could 'enter the game', which has implications not only in the domain of energy, but also in the domain of geopolitics. In Serbia, in addition to the agreement on the strategic pipeline, the privatization of the state oil company "NIS" has been realized (with two refineries, modest but with their own sources and a huge distribution network), which through different kinds of taxes makes up 15-19% of the state budget, a figure that must be taken into account when talking about the stability of the fiscal system" (Ponomareva & Proroković 2021, 126).

"Parallel to the strategic plans in the energy sector (which were successfully implemented when on January 1, 2021, in the village of Gospođinci in the north

of the country, the so-called Balkan Stream, 402 km long, has been officially put into work; the Serbian part of the Turkish Stream has been laid down all the way from the Bulgarian to the Hungarian border; Russian gas came to Serbia and the Republic of Srpska), Russia approved a credit line to Serbia for the revitalization of the railway in the value of 800 million dollars. Due to the geographic position of the country and its infrastructure connection, this project will be reflected on the traffic systems in Montenegro, B&H, (North) Macedonia, and Bulgaria. In addition, based on a special agreement from 2009, a Russian-Serbian humanitarian centre of regional significance was established in Niš (officially opened in April 2012)” (Ponomareva & Proroković 2021, 127).

In the economic field, the volume of Russian-Serbian trade was up to 4 billion dollars (in 2008), but fluctuations were also recorded after the global financial crisis (from 2009 to 2011) and after the introduction of EU sanctions against Russia in 2014 (Jović-Lazić & Lađevac 2018, 173-195). Despite this, it turned out that these “shocks” did not disrupt the economic exchange in the long term, so the growth of import and export indicators was quickly recorded (in 2021, about 3.6 billion dollars). It is significant that Serbia imports energy products from Russia (thereby ensuring energy security), whereby natural gas is supplied by the “Balkan Stream” pipeline that stretches through the territory of Serbia (the underground gas storage in Banatski Dvor is part of this project), while the majority owner (56% ownership) of the Serbian Oil industry is the Russian company Gazprom Neft. Serbia is not only the end-user when it comes to oil derivatives and natural gas, but also a distributor (of a regional character), which is important for the overall position. Since July 2021, Serbia has signed a free trade agreement with the Eurasian Economic Union, which enables the duty-free import and export of goods from Serbia to Russia, Belarus, Kazakhstan, Armenia, and Kyrgyzstan. A series of objective (underdevelopment of distribution chains, non-competitiveness of Serbian producers on the big market, relative lack of interest of Russian businessmen in investing in Serbia) and subjective factors (EU pressures, impossibility of developing new projects in the conditions of the pandemic and the following energy crisis) have prevented the full utilization of this possibility, although it still has a lot of potential (to a certain extent, among the European countries west of Belarus, Serbia is the only one that has such an “exclusive right”).

As far as military cooperation, “Russia has so far helped (direct aircraft donations and armoured patrol vehicles, favourable terms of purchase or credit) by equipping the Serbian armed forces with six MiG-29 planes, 30 armoured patrol and reconnaissance vehicles (BRDM-2MS), and 30 tanks (T-72 MS). Serbia has already purchased four new Russian helicopters Mi-35M and three transport helicopters Mi-17, as well as one anti-aircraft system, Pancir S-1 (it serves to defend

against low-flying objects and, because of its tactical and technical characteristics, it is currently the best tool for defense from such attacks). Curiosity arises from the fact that Serbia, in October 2019, became the first nation in history to which Russia's powerful anti-aviation system S-400 was transferred as a result of a joint military exercise" (Proroković 2020, 203–204).

The Government of Russia decided to establish an office at the Ministry of Defense of the Republic of Serbia in 2020, emulating NATO's interactions with this organization. For Serbia, which applies the principle of self-help in an anarchic environment, the intensification of military cooperation with Russia is a solution since it is practically in NATO's surroundings, which will not arm it, and the eventual entry into NATO would have to be "paid for" by the formal acceptance of the secession of the Kosovo-Metohija Albanians. For Russia, Serbia continues to be the only nation in the "Balkan NATO sea" with which Russia may cooperate. And where securing public support for such a move would be relatively simple (there are no obstacles like those Russia encounters in other countries as a result of their formal membership in NATO or because of anti-Russian resentment in public opinion) (Ponomareva 2020, 158–179).

It is significant that the activities have been carried out with undiminished intensity since 2014, when the EU and NATO began shaping an extreme anti-Russian policy while clearly and unequivocally calling on all candidates for admission to follow them. In this context, there was no lack of pressure on Serbia. Despite this, Serbia's foreign policy continued to place a high priority on improving relations with Russia.

Serbian-Russian relations after February 2022: conditions and perspectives

Serbia's very complex position in international relations has become even more complex after February 2022. Strategic balancing between the four pillars of foreign policy is becoming more difficult and demanding, perhaps even impossible. The US and the EU are waging a completely open and extreme hybrid war against Russia. Part of the measures they use, besides continuous arming and training of the Ukrainian military forces, are also economic sanctions, limiting energy cooperation, directing the decisions of international organizations, spreading Russophobia (via media resources, placing political messages, organizing various events, etc.), and exerting permanent political pressure on Russia. The EU's foreign and security policy, which is created in cooperation with the US and Great Britain

(i.e., through NATO, and the EU then follows NATO's moves and takes steps that are in line with the designed US strategy), is becoming extremely anti-Russian without any indication of change in the foreseeable future. It is to be assumed that the current situation will last, although only half a year after the new escalation of the Ukrainian crisis, it was clear how big and deep the ramifications would be for European countries. It might be too soon to judge whether the EU is working to its detriment, but it is equally feasible that such a judgment will turn out to be accurate very soon. With the fifth package of sanctions, the EU introduced restrictions on the purchase of Russian energy products (since there is no viable logistical and economic alternative for the import of Russian oil to Serbia through the territory of the EU member states, it is no longer possible to purchase Russian oil in the EU or Serbia, except that delivered via pipelines.), without having developed a plan for the procurement of alternative energy sources. This is even more noticeable when it comes to the natural gas market.

Ursula von der Leyen, the president of the European Commission, is in favor of ending the purchase of Russian energy products in the next five years and announced a plan according to which crude oil and natural gas from Russia would be completely phased out by 2027. The European Commission's proposal is less optimistic and foresees the fulfillment of this goal by 2030.

In addition to a series of questions that arise on this occasion (where will the EU buy energy, at what quantities and prices, how will this affect the competitiveness of the European economy on a global scale, etc.), the first among them is certainly: how to "survive" in an anarchic international environment by 2027 or 2030? The shortage of energy sources and the rise in prices will affect the economic dynamics within the EU, which will then induce social upheavals, and social upheavals cause political breakdowns! Logically and already seen many times in European history.

Despite the obvious consequences for the EU (and, to a lesser extent, the US), Western actors maintained organized pressure on Serbia to follow their foreign and security policy, impose sanctions on Russia, and review its relations with Moscow (N1 2022). On the one hand, it should be said that by preserving its relations with Moscow, Serbia avoided imposing sanctions on Russia and joined the most important decisions of the EU. Because of that the rate of compliance of Serbia with the EU foreign policy approach is only 44%, which represents a decrease compared to the last year. On the other hand, succumbing to that pressure, the representative of Serbia three times voted against Russia in the UN General Assembly when resolutions on the situation in Ukraine were on the agenda.

First, on March 2, 2022, Serbia voted for the UN General Assembly resolution “condemning the Russian invasion”, and then on April 7 (a resolution with a similar text and an almost identical voting result was adopted again on October 13), it joined the initiative of Western countries to suspend Russia’s membership in the UN Human Rights Council (UNHCR). However, both times, massive street protests were organized in Belgrade against such decisions by state authorities (the first protests were held on March 4 and the second on April 15). In the Western media, these outbursts of discontent were portrayed as the actions of “extreme rightists” (Radio Free Europe 2022). However, the public opinion polls that followed showed a very different picture. The survey of the *New Serbian Political Thought* showed that “the number of citizens who believe that sanctions should not be imposed on Russia is growing, and 84 percent of citizens now hold this view. As many as 60 percent of citizens say that it should not be done even if the European Union threatens Serbia with sanctions, while around 19 percent of respondents say that in that case sanctions should be approved” (Nova srpska politička misao 2022). The *Demostat* survey also brings similar results: “Only a third of Serbian citizens would support Serbia’s entry into the EU, while 51 percent are against it. More than half of the citizens believe that Serbia should not align with the EU’s foreign and security policy, an important criterion for further progress in European integration, while as many as 80 percent are against the introduction of sanctions against Russia” (Vreme 2022).

The vacillation of the ruling party (Serbian Progressive Party) and its yielding to Western pressure, which was demonstrated by voting at the UN General Assembly, also affected the result of the April parliamentary elections. Its list won a smaller number of mandates than expected (120 out of 250, which does not allow them to form a government independently), while at the same time, three non-parliamentary lists with a clear anti-Western orientation, despite the high turnout, managed to “skip” the census line and acquire parliamentary status. This shows that any “gamble” with the attitude towards Russia cannot remain without reaction from the public and voters, and it puts significant pressure on the government and institutions. Soon after the galloping “gas crisis” in Europe showed that there was no alternative to cooperation with Russia, the two presidents, Russian and Serbian, without mentioning the previous vote of Serbia’s representatives in the UN General Assembly, agreed that Serbia would buy this energy product through the Balkan Stream gas pipeline in quantities that meet two-thirds of its needs in the following three years at the price set according to the so-called “oil formula”, which means that it will be from 310 to 408 dollars for 1000 cubic meters (the price of natural gas on the European market was approximately

USD 950 at the time of the agreement, at the end of May 2022, with a tendency to rise higher; in September, it briefly exceeded USD 3,000) (Spasić 2022).

Despite the fact that, in the conditions of damaged relations between the collective West and Russia, it is practically impossible to implement planned bilateral activities and improve economic and military relations, political communication remained at a high level (despite Serbia's "slip" at the UN General Assembly), which is one of the indicators that the foreign policy orientation of Serbia will not drastically and dramatically change. That is, it will not change to the detriment of relations with Russia. Formally, the narrative about the continuation of European integration and the US as an important pillar of foreign policy is still maintained, but this does not affect the practical part of continuing cooperation with Russia and China. In conditions of strong public support for cooperation with Russia, it is difficult to expect drastic and dramatic changes since this would contribute to internal destabilization and create preconditions for a long and uncertain crisis in Serbia itself. In contrast to the Western external pressure when it comes to the attitude towards Russia, there is also fierce internal pressure in Serbia. As a result, the simplest approach is to strive to retain the foreign policy position that has been steadily developed since 2007.

Conclusion

A nation's foreign policy, which determines how it interacts with other actors, is affected by at least three fundamental factors: its geographic position, its historical experience, and the structure of the international political system. In the past two decades, Serbia's foreign policy has been shaped using standard evaluations and calculations pertaining to the three aforementioned factors. First off, Serbia's location geographically places it largely within the EU and NATO's surroundings. Although four countries in the Western Balkan region are not members of the EU, and judging by the current situation, they will not become so even in the foreseeable future (Montenegro, Bosnia and Herzegovina, Albania, and North Macedonia), NATO has persistently expanded along the southeastern geopolitical vector. Besides Serbia, the only country left outside this military alliance was Bosnia and Herzegovina. Due to the complex two-entity internal structure, the accession of Bosnia and Herzegovina to NATO is blocked by one entity – the Republic of Srpska. The Serbian ethnospace remains an island in the European NATO ocean. Serbia has to cooperate with the EU and NATO, it is a matter of "geographical necessity". The inevitable result of this cooperation between unequal

partners in terms of potential political, military, and economic power is that it frequently disadvantages Serbia. At certain moments, Serbia simply did not have the institutional, human, or financial resources to fully protect its interests. Therefore, the influence of the EU and NATO in Serbia is strengthened, and not the other way around. After all, this is what happened to all of the small states and even regional powers that participated in the European and Euro-Atlantic integration processes. It is also important for the political geography of the region that after 1999 the status of Kosovo remained “questionable” and after 2008 it was problematized. That is, the resolution of the UN Security Council defined that Belgrade and Pristina must agree on “substantial autonomy”, but these negotiations failed, which served as a reason for the Albanians to unilaterally declare independence. The key Western countries not only managed this process but also directed it. Although it seems a bit contradictory Serbia is condemned to close cooperation with actors who encourage secession in one part of its territory. The so-called “Republic of Kosovo” did not establish diplomatic relations with the majority of non-Western actors (among them are the most important ones: Russia, China, India, Brazil, Indonesia, the Republic of South Africa, etc.), but it did with the overwhelming majority of Western actors and Balkan states (excluding Greece, Bosnia and Herzegovina, and Romania). Therefore, “geographical necessity” could not also mean “political necessity”.

“Political necessity” was therefore determined by the remaining two criteria – historical experience and the transformation of the structure of the world political system. On the one hand, in the historical context, Western powers acted hostile towards Serbia. Russia protected Serbian interests when and as much as it could. In the Serbian foreign policy vision, relying on Russia appeared as an option in the last decade of the 20th century, and then it was further elaborated and concretized. On the other hand, the change in the balance of power in world politics and the relative and absolute decline in the military, political, and economic potential of the US and its allies have weakened their interest in the Balkans over time (they focus on more important regions and topics), and the pressure on Serbia gradually subsides. Thus, a certain room for maneuver was opened for the elaboration and concretization of Serbian-Russian relations and, no less importantly, for Serbian-Chinese relations. Establishing and upholding strong ties with Russia and China is what is meant by “political necessity.” Public opinion, which consistently puts pressure on political decision-makers, also has an impact on this outcome.

Keeping the above observation in mind, it is quite unlikely that the complete breakdown of relations between Russia and the West after February 2022 will have any impact on Serbia-Russia relations. Russia remains one of the priorities of Serbia’s foreign policy. Certainly, it is difficult to anticipate that relations with Russia

will continue to advance at the current rate given the altered geopolitical landscape and Serbia's location. This primarily refers to the implementation of initiatives to establish an office of the Ministry of Defense of Russia in Belgrade, to cooperate with the company Rosatom, and to build a nuclear power plant in Serbia in the foreseeable future. However, even without that, it is likely that the agreements made thus far and the projects begun will not be broken. Because, in addition to "geographical necessity", there is also "political necessity".

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Dušan PROROKOVIĆ

**SPOLJNA POLITIKA SRBIJE I ODNOSI SA RUSIJOM
KAO JEDAN OD PRIORITETA**

Apstrakt: Iako Republika Srbija (Srbija) nema usvojenu spoljnopolitičku strategiju, postoji niz elemenata koji se dosledno primenjuju. Jedna od njih je insistiranje na prioritetizaciji saradnje sa Rusijom. Srpsko-ruski odnosi su postali jači i dublji u poslednjih 20 godina i malo je verovatno da će na njih uticati promene u globalnom okruženju koje se dešavaju posle februara 2022. godine. Ovaj rad se bavi kontinuiranim srpsko-ruskim odnosima i njihovom dinamikom, uz analizu razvoja spoljne politike Srbije i objašnjenje kako su odnosi sa Rusijom postali prioritet. Analiza bilateralnih odnosa dveju država vrši se oslanjanjem na strukturalni realizam kao teorijski okvir, pre svega na razmatranje principa samopomoći kao jednog od ključnih faktora pri određivanju spoljne politike. Metodološki okvir se zasniva na analizi diskursa, analizi sadržaja, ali i korišćenju komparativne metode, metode indukcije i dedukcije.

Ključne reči: spoljna politika Srbije, Rusija, NATO, EU, Kosovo i Metohija.

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The free trade agreements of North America

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Abstract: The definition of North America as a sub-region of the New World from the end of the Cold War to the post-Cold War era is still a perennial problem. The paper focuses on the analysis of the status of three countries in North America during the period from 1980 through 2022. By using the comparative method, content analysis from a legal point of view, and historiographical and statistical methods, the paper offers an answer to the research question: Can Canada, Mexico, and the United States nourish the idea of North America as a common area? Divided into two periods – before and after 2001, the paper points to the importance of the bilateral Canada-United States Free Trade Agreement (CUSFTA), which was superseded by the North American Free Trade Agreement (NAFTA) as a trilateral agreement involving Canada, Mexico, and the US. Further on, NAFTA was substituted by the Canada-United States-Mexico Agreement (CUSMA) as the final version. CUSMA was created in the years of the growing trends towards the weakening of democracy in Mexico and the US. The conclusion of this paper is grounded on the findings related to this sub-region of the New World.

Keywords: CUSFTA, NAFTA, CUSMA, North America, Canada, US, Mexico, common area.

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Introduction

After long-lasting, tough negotiations, the Canada-United States-Mexico Agreement (hereinafter: CUSMA) was ratified by legislative bodies of Canada, Mexico, and the US, and came into effect on 1st July 2020 (Government of Canada 2021, 1).² For many reasons, it was a very important day for North American countries. One can say that the CUSMA was concluded in times of major uncertainties: the global health crisis caused by the COVID-19 virus, the constitutional crisis and political turmoil in the US, and, above all, (un)successful attempts to undermine the integration process among countries of the North America. The attempt to define North America was firmly rooted in the surpassed traditional comprehension which includes Canada and the US. The narrow understanding of this part of the Americas as a separate sub-region had its foundation in the period of colonisation and the partition of the Americas. The settlement of the sub-region was caused by multi-level interests, policies, and strategies of great powers.

From a historical standpoint, France, Spain, and the United Kingdom (UK), as great powers, paved the way for drawing up Canada, Mexico, and the US constitutions. The outcome of the complex and lengthy period of colonisation and partition of North America was defining the spheres of interest. Historically, Canada, Mexico, and the US were constituted as single territorial units whose development and existence resulted from different Canadian, Mexican, and the US dynamic processes. As a result of the capability and influence of France, Spain, and the UK, it was possible to create an appropriate climate for Canada's, Mexico's, and the US's overall development. And indeed, at the end of the 1980s, Canada and the US were eventually re-orientated towards the establishment of CUSFTA – a trade bloc and inter-governmental organisation. The achievement of this purpose was possible in 1988 when Canada and the US decided to put their signatures on the key bilateral agreement – the Canada-United States Free Trade Agreement (hereinafter: CUSFTA), which, over the coming decades, strengthened the deep co-operation among countries of North America that would lead to the creation of North American Free Trade Agreement (hereinafter: NAFTA) and CUSMA.

The essence of Canada's and the US's decision to mutually co-operate on an equal basis encompasses a long-term vision to improve the inter-state relationships

² Contrary to the literature in Canada related to the Agreement, in the US literature CUSMA is well-known as the United States-Mexico-Canada Agreement (USMCA). In the literature of Mexico CUSMA or USMCA is called *Tratado entre México, Estados Unidos y Canadá* (T-MEC).

that have been developing since Canada's independence. In that sense, it should be highlighted that Canada has achieved its independence at a slower pace than Mexico and the US. Nevertheless, the Canada-US co-operation reached a crucial milestone in 1908 when both countries finally and officially delimited and demarcated the national boundary from the forty-nine parallel of the north latitude (The Treaty between the United States of America and the United Kingdom concerning the Boundary between the United States and the Dominion of Canada from the Atlantic Ocean to the Pacific Ocean 1908, Article VII and VIII, 10-12).

The era of the Fourth Industrial Revolution, characterised by digitisation since the 2008 global financial crisis, has emphasised the indisputable importance of close co-ordination of Canada, Mexico, and the US aimed at creating common policies and realising possible multi-level unification into a common area for North American foreign trade. Mexico's decision to make trade arrangements with Canada and the US impacted, to a great extent, the further development of the common area of Canada, Mexico, and the US. In the digitisation era, this common area is considered a highly topical issue for fruitful discussion among experts and scholars on multidisciplinary research regarding this part of the Americas.

Based on selected literature, this paper aims to point to the theoretical background of the research about co-ordinated and orientated trade among Canada, Mexico, and the US in favour of the common area. Owing to foreign trade, it was possible to define North America after de-colonisation and the achievement of the independence of Canada, Mexico and the US. Despite economic turmoil and political crises in Mexico and the US during the last three decades, the common area among countries of North America has survived.

The comparative method is applied to support the research question: Can Canada, Mexico, and the US nourish the idea of North America as a common area? On the other hand, the method of content analysis is used for the agreements and treaties ratified by the countries of North America. These agreements and treaties are noteworthy for the development of international public law and the evolution of the Free Trade Agreements (FTAs) system.

The findings presented and explained in this paper are grounded on historical events. They detect and explore the connection between the causes and effects of the creation of the CUSFTA and, later, NAFTA and CUSMA. The intention of Canada and the US to make an important step towards strengthening effective co-operation with long-term effects resulted in Mexico's joining the CUSFTA. Their foresighted decision to put their signatures on the CUSFTA at the beginning of 1988 (Capling and Richard Nossal 2009, 151) and implement its provisions was underpinned by their vision to transcend the national boundaries by pursuing the

common foreign trade policy, which, as Smil put it, and Hale (2018, 165) quoted, for example, resulted in

‘[e]nergy transitions (that) involve major changes in the sources of energy available for use, whether nationally or regionally, in commercial, industrial, residential, or transportation functions, and the diffusion of economically competitive technologies and transportation systems to enable their secure (reliable), relatively efficient implementation for widespread use in particular sectors and geographic areas.’

The supporting argument in favour of the transportation functions in the common foreign trade among countries of North America implies that they are feasible because of the common language of these countries. With this in mind, for example, the trade between Canada and the US is still functioning to establish ‘[...] tighter economic ties.’ (Helliwell 1997, 10). This also applies to the Mexico-US relationships.

Canada, Mexico, and The US: Important actors and key factors in defining North America

When the 27th Conference on the Parties (COP27) was held in Sharm-el-Sheikh, Egypt, within the United Nations Framework Convention on Climate Change (UNFCCC) to resolve the problem of carbon dioxide and start the decarbonisation process (UNFCCC 2022, 2 *et passim*), Canada, Mexico, and the US agreed to hold trilateral meetings after the Conference. Whenever they held trilateral meetings, Canada, Mexico, and the US tended to avoid the potential impacts of future crises and discuss them if they arose. As a result, the last trilateral meeting was organised in Mexico City at the beginning of 2023 (Congressional Research Service 2023, 1).

In the following two subsections of this paper, a brief history of Canada, Mexico, and the US indicates that the period from 1980 to 2022 implies to the incomprehensible radical changes. For example, in 1980 the automotive and other industries still depended on manual work with robotics assistance. However, forty-two years later, in 2022, these industries rely on computers using artificial intelligence (AI) and digital manufacturing which radicalised people’s consciousness and perception of the world, becoming ‘[...] a very real threat facing tens of millions of (employees), everyone from truck drivers and lawyers to call center workers and accountants.’ (Baldwin 2019, 190).

Canada, Mexico, and the United States from 1980 to 2001

In November 1980, Ronald (Wilson) Reagan was elected as the US president, and his first term began on 20th January 1981. That year, Canada successfully overcame both constitutional and political crises. Quebec's first attempt to secede from Canada during the premiership of Joseph Philippe Pierre Yves Elliott Trudeau and under the leadership of secessionist René Lévesque failed. This act may be interpreted as one of the reasons why the Constitution of Canada was adopted and enacted in 1982 (LaSelva 2002, 208; Oliver 1999, 542-543).

As for Mexico, this country has been viewed as one of the Latin American countries for an extended period of its history. From achieving independence in the 1820s to 1992, Mexico was regarded as part of Spain's political and cultural identity. With its mainly weak economy and political culture, Mexico has also been regarded as part of the US's economic and, to a lesser extent, political influence. During the presidential term of José López Portillo, Mexico hosted the North-South economic summit conference at Cancún (Gupta and Anisul Islam 1983, 1) in the oil boom period, which '[...] initiated the last period of high growth rates until the late 1990s' (Hamnett 2004, 277). The North-South economic summit conference in Cancún added significance to the need for global negotiations which arose in the Reagan era. Yu III (2008, 37) cited Rubens Ricupero, the former Secretary-General of the United Nations Conference on Trade and Development (UNCTAD), for highlighting the atmosphere favouring globalised economy in the era of diplomatic confrontations and struggles between developed and developing countries during the 1980s. In this atmosphere, Canada, Mexico, and the US gradually built solidarity and defined unconditional mutual trust, which paved the way for NAFTA.

No one thought that changes at the global level at the time of Pierre Trudeau, José López Portillo, and Ronald Reagan could lead to the overall radicalisation of the world order that was polarised in two ideologically opposite blocs. The capability of capitalist states, characterised by an open economy and liberal political system, to oppose the concept of states with single-party systems, as well as socialism that relied on a planned economy, contributed to the existence of the FTAs system. While the Cold War was coming to an end during the 1980s, capitalist states Canada, Mexico, and the US were preparing for the establishment of NAFTA, that, according to Viner quoted by Panagariya (1996, 485), indicates a strong tendency towards '[...] liberalise(d) trade on a discriminatory basis by removing trade barriers exclusively against union members [...]']'.

After being re-elected as the US president in 1984, Reagan spent his second term preparing himself for defining and taking a new step in relationships with

Canada in terms of trade integration. Together with his counterpart and the successor of Pierre Trudeau and John (Napier Wyndham) Turner, (Martin) Brian Mulroney has accepted the task of co-ordinating Canada's trade policy with the same policy of the US. But Mexico has stood aside during the presidential term of Miguel de la Madrid Hurtado, who, as opposed to Mulroney and Reagan, undertook the task '[...] to stabilise the economy and survive the immediate (economic) crisis (which depended on oil and its products), and to find some alternative model of development for the country' (Hamnett 2004, 279).

The signing of CUSFTA during Mulroney's and Reagan's administrations on the eve of the Cold War was seen as a foresighted act to denote the outlines of the future relations in the field of trade between Canada and the US through the inter-governmental organisation. Under Article XXIV of the General Agreement on Tariffs and Trade (GATT) concluded in 1947, Canada and the US were obliged to work to 'establish a free-trade area' (CUSFTA, Article 101). The following Article 102 of CUSFTA stipulated that both countries will:

- 'a) eliminate barriers to trade in goods and services between the territories of the Parties;
- b) facilitate conditions of fair competition within the free-trade area;
- c) liberalize significantly conditions for investment within this free-trade area;
- d) establish effective procedures for the joint administration of this Agreement and the resolution of disputes; and
- e) lay the foundation for further bilateral and multilateral cooperation to expand and enhance the benefits of this Agreement.' (Government of Canada 1988, 9).

The vision to integrate independent national markets of Canada and the US and their mutual trade into a free trade area is supported by the common language and convergent policy in favour of the functioning of CUSFTA. As opposed to that, the absence of the vision to achieve a deeper integration between Canada and the US, and later Mexico, into a single area relied on the ambivalence of the US foreign and neighbourhood policy towards Canada. Moreover, the independence of the US economic and monetary policy from Canada was one of the obstacles to the economic dimension of the Canada-US integration, fuelled by the fact that '[t]he international capital markets and domestic asset holders had (seriously) lost confidence in the Canadian currency' (Courchene and Harris 2000, 13).

Gaining crucial confidence in the Canadian dollar as the national currency would ease, speed up, and spur the economic and monetary integration between Canada and the US as the only two founding states of the CUSFTA. On the other hand, the lack of the needed confidence in the Canadian dollar was in contrast to

the provisions of the CUSFTA relating to the gradual and free elimination of trade barriers to goods and services set up by Canada and the US as CUSFTA's high contracting parties. Owing to the removal of the trade barriers by Canada and the US, the CUSFTA addressed essential issues in its eight parts and twenty-one chapters in the field of agriculture, binational dispute settlement in antidumping and countervailing duty cases, border measures, emergency action, energy, financial services, investment, rules of origin, services, temporary entry for business persons, trade comprising automotive goods, etc., (Government of Canada, 1988).

In the 1988 presidential election, Reagan was succeeded by George (Herbert Walker) Bush or George Bush Sr, who actively worked on further implementation of the CUSFTA's provisions. One can say that he managed to do it despite the economic crisis in Canada of 1990, resulting in the acute '[...] recession and a loosening of monetary policy (in which) the Canadian dollar resumed its downward trend' (Blacker and Seccareccia 2014, 8). The evidence for this quote can be found in Galbraith's argument that in the first years of the implementation of the CUSFTA's provisions, Canada confronted the wrongdoings of Robert Campeau, the man who had been suspected of illegal business activities dealing '[...] with hundreds of millions of entrusted dollars', which could be a dangerous trigger for '[...] the greatest financial scandal of all time' (Galbraith 1990, 103-104).

While Campeau was developing harmful business ties with the possibility of undermining the financial systems of Canada and the US, no one expected nor imagined that the CUSFTA would survive. Also, no one in the international community in 1990 predicted publicly that George Bush Sr would be succeeded by his son, George (Walker) Bush or George Bush Jr in the last year of the 20th century, who was well-known as the first president who called into question the validity of the NAFTA provisions in the first place due to the long-lasting '[...] war on terror (during which an) immigration agreement with Mexico (was promised)' (Powaski 2019, 141).

When Bill Clinton (William Jefferson Blythe III) was elected as the next US president in 1992, the era of overall world progress was believed to begin. It was obvious that there was a need for unstoppable integration processes in North America as a result of favouring the climate of growing, mutual trust among states. This atmosphere was marked by co-operation among Canada, Mexico, and the US aiming to facilitate trade and, accordingly, to enable the free circulation of goods and the migration of people by accepting NAFTA under the influence of the US president who '[...] won the constitutional authority to substitute the agreement of both Houses for the traditional advice and consent of the Senate' (Ackerman and Golove 1995, 803).

During Clinton's two presidential terms, the United States was the leading promoter of the idea of spreading democracy as one of the tools for resolving many intra- and inter-state relationships. In the period from 1993 to 2001, the US was conducting its foreign policy intending to be not only a hegemonic state but also an arbiter in avoiding and freezing inter-state conflicts, including the possibility of using controversial and unilateral US-led military intervention, which, by the end of the 20th century, '[...] was (...) a call to reject the political counterpart (...) and (...)) to impose (the US's) will' (Black 2016, 226). As for North America, in the post-industrial era, the US has gradually been confronted with a growing number of illegal immigrants originating from Mexico with the possibility of assimilating them into the United States (Castles 2002, 1155; De Genova 2002, 433; Grandin 2019, 208; Powaski 2019, 9).

At the beginning of Clinton's first term of office in 1993, Kim Campbell (Avril Phaedra Douglas Campbell) was elected as the first female Canadian prime minister. That was a significant event representing a milestone in the political history of Canada. Campbell's previous post was '[...] an MP from Vancouver who had proven her mettle as minister of Indian and northern affairs and minister of justice' (Conrad 2012, 264). The election of Kim Campbell meant a progressive step towards the de-masculinisation of Canadian politics and inevitable changes in domestic political climate and culture, which spawned '[...] questions emerging from (...) feminist foreign policy and gender equality (that) include the following: How is th(e) rhetoric different from previous governments' approaches to promoting gender equality in foreign policy commitments?' (Tiessen and Swan 2018, 187-188). The possible answer to these questions relies on the fact that Canada is very highly ranked in the Human Development Index (HDI) and that the de-masculinisation of Canadian politics is very dependent on women, who tend to be active in formulating Canada's foreign policy agendas.

When one compares the position of Canada in the HDI every five years (in 1990, 1995, and 2000), it can be observed that Canada was ranked among countries with very high human development. From 1980 to 1985, before the introduction of HDI as a contemporary measure of human development, life expectancy in Canada increased from 75.2 to 76.6 years (Statistics Canada 2018, 1-2). The 1980s saw gradual growth in life expectancy owing to the long-term internal social order and peace. During these years, all possible gains in the early phase of trade liberalisation between Canada and the US in the second half of this decade were '[...] sufficient so that the growth rate accelerated for a period of years' (Krueger 1998, 1517).

The introduction of the HDI in 1990 shed light on the problems of the world countries and the way to tackle multifaceted issues in international relations. Faced with the unresolved problem of dealing with growing economic, political, and social

issues, many world countries, including North America, were trying to find an optimal solution for improving their educational standards, welfare conditions, and life expectancy. The improvement of these criteria served as a basis for adopting the Millennium Development Goals (MDGs), signed in 2000, which heavily relied on the United Nations Millennium Declaration. Within these goals, many issues were defined. They were reflected in

‘[c]ollective identification of needs and the provision of resources towards building the capacity of health care providers at all levels; pre-service and in-service has boosted the confidence and motivation of service providers’ (the United Nations Development Programme and the World Bank Group 2016, 93).

Apart from the MDGs, the problem of human development in Canada and the US had not existed to the extent that would be an obstacle to both countries as recognised countries. The case of Canada indicated sustainable growth in human development, particularly in the sphere of life expectancy. Canada was ranked 2nd in the HDI in 1990, occupying a higher position compared to Mexico and the US (United Nations Development Programme – UNDP 1991, 15).

In respect of Mexico, the life expectancy (*la esperanza de vida*) in the 1980s notably progressed to a very moderate level. The statistical data on life expectancy in Mexico in 1980 and 1985 amounted to 66.55 and 68.81 years, respectively. In 1990, when Mexico initiated trade integration with Canada and the US while expanding CUSFTA, life expectancy in Mexico reached 70.87 years (Datos macro 2023, 1). As a result, in 1990, Mexico was ranked 45th (UNDP 1991, 16). Compared with Canada and the US, it is noticeable that Mexico was positioned very low. Such a position may come from discrepancies in living standards among countries of North America in the 1980s and at the beginning of the 1990s.

As regards human development in the 1980s, the US was also highly ranked. According to the US statistics, life expectancy in 1980 and 1985 was 73.25 and 74.37 years, respectively (Statista 2022, 1). However, the year 1990 reports the US experiencing a notable growth in life expectancy, occupying a very high position and ranking 7th (UNDP 1991, 15). This fact points to gradual changes that impacted the improvement of US citizens’ quality of life and standard of living.

In the modern history of Canada and the US, particularly during the Cold War, Mexico was viewed as a country with an occasionally unstable social order. The 1980s witnessed a backward social order caused by economic weaknesses regardless of significant policy improvements and measures by Portillo’s, de la Madrid’s, and Carlos Salinas de Gortari’s administrations at the end of the war. With this in mind, the three successive Mexican presidents who have made decisions about the economy and foreign policy tended to nourish the idea of

Mexico's independence by staying out of Canada's and the US's policy in the domain of trade and defining North America mainly as encouraged by

'[t]he debt crisis of the 1980s and the breadth and depth of concurrent economic problems-high inflation, overvalued currencies, chronic disequilibria in trade and fiscal balances, (and) massive capital flight [...]' (Lee 1995, 1275).

The importance of the CUSFTA was confirmed by transferring its provisions to NAFTA, which was ratified and embodied in the legal systems of Canada, Mexico, and the US by coming into force in 1994. Comparing the CUSFTA and NAFTA, one can note that with regards to NAFTA, there was a great tendency among the three countries to fully co-operate and deeply harmonise complex and different issues of common trade. The essential characteristic of NAFTA is adherence to the provisions prescribed by CUSFTA in which Mexico was treated as the third party to this agreement on an equal basis as a result of '[...] Mexico's unilateral trade liberalization that began in 1986' (Romalis 2007, 416). There are some similarities between NAFTA's and CUSFTA's provisions. At first glance, no important changes have been made in the NAFTA provisions – they are divided into eight parts. However, the accession of Mexico to the Canada-United States Free Trade Agreement meant not only renaming the bilateral agreement into the trilateral agreement but also a new, broader definition of North America in which Mexico was recognised as its integral part (Capling and Richard Nossal 2009, 148). Consequently, the following question is raised: What are the similarities and differences between CUSFTA and NAFTA?

Being in force from 1994 to 2020, NAFTA owes its survival to its precisely defined provisions. The use of content analysis from a legal point of view reveals that the evolution of NAFTA's provisions, covered by twenty-two chapters, had to do with the time of the Uruguay Round of Multilateral Trade Negotiations during the 1980s and the future establishment of the World Trade Organisation (WTO) in which '[...] the NAFTA drafters added a phrase which provides (...) amendments (that) must be consistent with any successor agreements to the GATT [...]' (Rosa 1993, 273, footnote 123). The consistency of NAFTA provisions with the GATT has to be grasped in the context of an in-depth understanding of the need for co-operation and in line with the existing regulations on multilateral trade. Viewing NAFTA as a specific agreement and comparing it with CUSFTA, it should be noted that Chapter Twenty of Part Seven is changed significantly. While Chapter Twenty of the CUSFTA's Part Seven generally stipulates that high contracting parties will further work together on the implementation of legal systems by respecting CUSFTA provisions which define the mutual obligations of Canada and the US, NAFTA provisions do not state the above. For example, regarding intellectual property in Article 2004 of the CUSFTA, it is stipulated that both parties shall pursue

their policy and '[...] cooperate in the Uruguay Round of multilateral trade negotiations and in other international forums to improve (the) protection of intellectual property' (The Canada-U.S. Free Trade Agreement 1988, 296) important for the development of the Fourth Industrial Revolution.

On the other hand, intellectual property rights are not mentioned in NAFTA's Part Seven, i.e. in Chapters Eighteen, Nineteen, and Twenty. Instead, these chapters refer to administrative and institutional provisions. Chapter Twenty regulates general institutional arrangements and dispute settlement procedures. In Article 2003 of this chapter, countries of North America are obliged to '[...] agree on the interpretation and application of this Agreement, and shall make every attempt through co-operation and consultations to arrive at a mutually satisfactory resolution of any matter that might affect (the) operation (of dispute settlement procedures).' (North American Free Trade Agreement 1992, 375). For example, NAFTA's provisions regarding intellectual property rights may be found in Part Six and Chapter Seventeen with annexes to the Agreement (North American Free Trade Agreement 1992, 328-349).

According to some scholars, there is a similarity between Chapter Nineteen of CUSFTA with the same chapter of NAFTA. It is pointed out that Chapter Nineteen of NAFTA '[...] is the direct descendant of Chapter Nineteen in the 1988 Canada-United States Free Trade Agreement [...]' (Miranda and Levy Kent 2018, 1). The analysis of the same chapter in both CUSFTA and NAFTA reveals that the analogue provisions apply to Mexico, particularly since CUSFTA has been superseded by NAFTA, regardless of its economic conditions and political climate, which are characterised by different patterns of development in comparison with Canada and the US.

The first years of the implementation of NAFTA were marked by events that shaped our consciousness on the relativity of the state's power in the post-Cold War era. In 1995 Canada experienced its second constitutional and political crisis manifested in Quebec's repeated attempt to achieve independence. Under the leadership of the separatist Jacques Parizeau, who tried to resolve the status of Quebec by splitting from Canada, the attempt was a failure due to the strenuous Canadian prime minister (Joseph Jacques) Jean Chrétien, who pushed the supremacy of the '[...] federal legislation to limit a federal minister's to introduce a constitutional amendment resolution to Parliament' (Oliver 1999, 601-602).

The discussion on the importance of the multi-level integration of NAFTA member states is possible when one considers that the trade depends covertly on the complex unity of Canada, Mexico, and the US. Regarding the territorial integration of states, as one can see in the case of NAFTA members, inter-state

disputes are likely to be settled by using the existing procedures of international organisations. The following argument for this assumption relies on the fact that

‘[t]he dispute settlement provisions of Chapter 20 are applicable primarily to inter-state disputes concerning the interpretation or application of the NAFTA, including disputes relating to the financial services provisions of Chapter 14’ (Shaw 2008, 1039).

The CUSFTA stipulates financial services in Part Five, Chapter Seventeen. These services encourage mutual trust between Canada and the US. In Articles from 1702 to 1705, Canada and the US are reciprocally obliged not to impose discriminatory measures in their financial services and transactions (The Canada-U.S. Free Trade Agreement 1988, 251-254). When it comes to mutual trust between countries, it implies that financial services and transactions tend to surpass local, state, and national boundaries.

If Miguel de la Madrid Hurtado is remembered for pursuing an independent foreign trade policy regardless of the common trade policy between Canada and the US, then Carlos Salinas de Gortari is remembered for taking a critical step towards advocating the necessity of joining Mexico to the CUSFTA. In this sense, de Gortari made great success with the inclusion of Mexico in NAFTA, a trilateral agreement signed on 17th December 1992 (Ortiz 2009, 295). The successor of Carlos Salinas de Gortari, Ernesto Zedillo Ponce de León, continued to pursue the policy of his predecessor to facilitate trade with Canada and the US. Also, de León pursued the policy towards allowing US companies to allocate their production with cheap labour forces to Mexico. Such policy was the very reason why US companies devoted themselves to creating and encouraging the existence of *maquiladoras*³ which in the 1990s were renowned for difficult circumstances and inadequate conditions for the Mexican workforce. In these circumstances, Mexico seemed not to enjoy equal status within NAFTA, which is confirmed by the fact that ‘[...] the struggle to preserve the community, whose residents are primarily maquiladora workers, has also led to labor conflict in the factories themselves’ (Bacon 2004, 133).

In addition to labour conflict, the Mexican currency crisis in 1995 indicated that the economy of Mexico was incompatible with the economy of Canada and, especially, the US economy. In comparison with the economy of Canada and the US, Mexico featured a backward economy which could threaten the common trade among NAFTA’s member states. Accordingly, the US acted without delay to restore

³ Maquiladora – a factory in Mexico run by a foreign company and exporting its products to that company’s country of origin.

the economy of Mexico by providing financial support, which is illustrated by the fact that

‘[...] the administration of U.S. President Bill Clinton stepped in and proposed a \$40 billion loan package to bail out the Mexican government. Although Congressional opposition prevented passage of this proposal, the Clinton administration used existing exchange-rate stabilization funds to make a smaller package of \$20 billion of loans and loan guarantees available to Mexico, coupled with additional aid from multilateral institutions such as the IMF’ (Blecker 1996, 3).

Despite the currency crisis, Mexico successfully saved its relatively unchanged position in the HDI ranking scale since it connected Canada and the US with the rest of the Americas. The statistical data for the year 1995 show that Mexico ranked 49th (UNDP 1998, 21), preserving its status as the country capable of maintaining a balance of trade between Canada and the US with the countries of Latin America. On the one hand, owing to its stable political climate, Mexico overcame the crisis and consequently enabled the implementation of NAFTA, pursuing ‘[...] the stabilisation policies introduced (that) contributed greatly to the rapid recovery of the Mexican economy’ (Hamnett 2004, 292). On the other hand, in the year 1995, according to HDI, Canada and the US ranked 1st and 4th, respectively (UNDP 1998, 20). Such a high position indicated the tendency of these countries to maintain and preserve a peaceful and stable political climate to facilitate the implementation of NAFTA provisions. Moreover, the stability of political environments in both countries, including Mexico, was confirmed ‘[...] by creating a climate of investor optimism that kept short-term capital flowing into Mexico despite deep social and economic problems, including an overvalued peso’ (Anderson, Cavanagh, and Landau 1997, 1).

The long-lasting harmonisation of Mexico’s economy with the conditions and provisions of NAFTA resulted in notable trade growth between Mexico and the US but slow trade growth between Canada and Mexico. During the 1990s, Mexico and the US began to confront and struggle with illegal immigrants and illicit drug trade. To Clinton and de León administrations, it seemed that these criminal activities would not be a serious issue because they were not perceived as a threat of terrorism but, on the contrary, led to the perception that the ‘[...] U.S. economic policy has provoked one of the greatest migrations in history [...]’ (Grandin 2019, 209).

In Clinton’s second presidential term, the immigrant issue could be treated as a sensitive issue that would jeopardise trade, especially since the establishment of NAFTA. Due to the US’s good relationships with Canada and Mexico, the trade among countries of North America was not in contrast to the immigrant issue

(Woroby 2019, 134-138). During their presidential term, Clinton and de León did not regard immigration as an agenda for tackling inter-state issues towards surpassing many '[...] continuing strains, tensions, and setbacks – a far cry from the precrisis period' (Morris and Passé-Smith 2001, 144).

In defining the post-Cold War relationships among countries of North America in future events, it was necessary to develop close co-operation. When it comes to long-established relationships between Canada and the US, as the signatory states of CUSFTA, it is obvious that both countries endeavoured to preserve their relationships to avoid, in the long-run, political instability and turmoil in favour of creating the domestic economy and conducting foreign policy. It was proven that preserving such relationships has been key to maintaining the high-level co-operation between Canada and the US. In later years, this co-operation was expanded to Mexico, providing for the internal order in Canada, Mexico, and the US to be compatible with the functioning of NAFTA, which was regarded as a respectable inter-governmental organisation among countries of North America. NAFTA '[...] was (solely) designed as a business contract among the three countries with limited instruments for strengthening and extending its scope' (Miller, Dillon, and Robertson 2014, 7).

Once established, NAFTA not only superseded CUSFTA but also paved the way for consultations on the actual and future directions of multifaceted relationships among statesmen of Canada, Mexico, and the US. Considering NAFTA in a broader context of the definition of North America, Mexico is recognised as the third country in this part of the Americas. The last decade of the 20th century has been marked by an attempt to cement all decisions and endeavours of North American statesmen owing to '[...] awareness of the need to balance economic integration and security needs (that) has sparked even closer cooperation between the three governments' (Condon 2018, 37). Canadian, Mexican, and US statesmen's unquestionable commitment to the NAFTA provisions was heralded as a new way of thinking about how the agreement must adapt to a changeable reality. The major development in the sphere of digital and information technology in the late 20th century raised a question about the new reality in the development of mobile phones by using computerisation (Bresnahan 1999, 403-404). In any case, in 2000, Mexico and the US experienced significant changes in their political climate – Vicente Fox Quesada and George Bush Jr were elected as presidents of Mexico and the US.

The change of the ruling political party in Mexico in 2000 led to a new political climate that spurred the slow development of democracy and confirmed the importance of a multiparty system in this country. The victory of Vicente Fox Quesada in the presidential election in Mexico was a turning point in the ruling

Institutional Revolutionary Party (Partido Revolucionario Institucional – PRI). The long-term presence and survival of the PRI on the political scene of Mexico from 1930 to 2000 was partially the result of the legacy of civil war in the 1910s and the defined but unfinished vision of Mexico within the democratisation process. This vision was undermined by the flow of illegal immigrants at the end of the 20th and the turn of the 21st century (Ortega Velázquez 2020, 7).

The last leap year of the 20th century, on the one hand, saw an insignificant decline in the HDI, as indicated in the case of Canada and the US. The countries were ranked 3rd and 6th in the HDI ranking scale (UNDP 2002, 149). Compared with the HDI 1990 and HDI 1995, Canada and the US were ranked among countries with high human development, whereas from the 2000s to 2022, they were recognised as countries with (very) high human development. In the 1990s and earlier, Canada, Mexico, the US, as well as all countries of the Americas, were not ranked as countries with multi-dimensional development. On the other hand, Mexico experienced a significant decline in the HDI, occupying the 54th position, so it was ranked among countries with medium human development (UNDP 2002, 150). In broad terms, with its internal political change, Mexico was ranked among countries with high and medium human development. Such a position of Mexico reveals that its efforts were directed not only to prevent the greater decline in the HDI but also to avoid a further dramatic plunge in that sense.

Despite being the prime minister of Canada in the 20th century, Jean Chrétien was the only statesman who extended his activity in Canadian public policy to the first years of the next century. With its exceptionally high position in 2000, Canada confirmed its development standard and consequently tried to cope with many challenges likely to be faced in the post-Cold War. Furthermore, as a country which is partitioned into many federal units, Canada retained its territorial integrity because it was brought into line with the NAFTA provisions on Canada's involvement in the trade among countries of North America.

Canada, Mexico, and the United States from 2001 to 2022

The year 2001 began with a change in the perception of ideological conflicts between the countries with capitalist and socialist economic systems, which as part of the past, consequently led to democratisation. The change of ruling party in Mexico was confirmed by the victory of the National Action Party (Partido Acción Nacional – PAN) partially because '[t]he government has often suggested the need for modernization and democratization, but it has been very slow in promoting these tendencies' (Stavenhagen 2000, 131). The new ruling party was a turning point in Mexico's political history since that was a unique time for unavoidable

changes in the country's political arena. Mexico was striving for the political modernisation process in relation to Canada and the US. The election of Paul Edgar Philippe Martin (Paul Martin Jr) as the Canadian prime minister in 2003 supports this presumption. In conducting the Canadian foreign policy, Martin was dedicated to the survival of NAFTA as an additional confirmation of the Canadian presence in world politics. He is a descendant of Joseph James Guillaume Paul Martin (Paul Martin Sr), an eminent figure in Canadian diplomacy and politics who ensured Canadian presence in world politics during the Cold War. Paul Martin Sr was particularly responsible for maintaining and strengthening the democratisation process, which incorporated

'[...] three priorities: first, the promotion of prosperity and employment through trade; second, the promotion of global peace to protect Canada's security; and third, the projection of Canadian values and culture for Canada's success in the world. There was a fourth, *de facto* priority: ecologically sustainable development was highlighted as an imperative crosscutting the other three' (Kirton 2009, 6).

The involvement of Mexico in global affairs in the 21st century means a continuation of the active foreign policy of the previous two centuries of Mexico's independence which oscillates between the United States, on the one hand, and Latin America, on the other. When Felipe de Jesús Calderón Hinojosa (Felipe Calderón) was elected in 2006 as the president of Mexico (Congressional Research Service 2006, 2), Paul Martin Jr resigned his position (Calvert 2018, 151). In the same year, the Economist Intelligence Unit (EIU) began to publish the annual Democracy Index, which is regarded as an important tool for the assessment of a better and deeper understanding of the world countries' status, including Canada, Mexico, and the US in the international community and international relations.

According to the 2006 Democracy Index, Canada and the US were ranked 9th and 17th, respectively, among the countries characterised by full democracy. As opposed to Canada and the US, Mexico was ranked among countries with flawed democracies occupying the 53rd position (EIU 2007, 3). One of the possible explanations and reasons for the low score of democracy in Mexico may be found in the absence of a more effective and stronger functioning of its government and the advanced development of political culture and participation.

The year 2006 was important not only for the presidential elections in Mexico but also for the election of the prime minister of Canada. Stephen (Joseph) Harper won this election and, together with Felipe Calderón and George Bush Jr, witnessed the emergence of the 2008 global financial crisis, which escalated into a deeper economic crisis. During his premiership, Canada was badly hit by the crisis. Its trade

with Mexico and the US was partially weakened because '[...] the US economy entered into a recession by the end of 2007. In the fall of 2008, the recession deepened further' (Zestos 2016, 103). In 2005, a year before the elections both in Canada and Mexico, Canada was ranked 4th in HDI, undoubtedly indicating that it was among the countries with high human development. The US and Mexico were ranked 12th and 52nd, respectively, among countries with the same high level of human development (UNDP 2007, 229). Country classification according to the level of human development of Canada, Mexico, and the US clearly showed a tendency to maintain nearly the same level of human development.

In 2008, Barack (Hussein) Obama Jr achieved a sweeping victory in the US presidential election, marking the end of the George Bush Jr era. As the descendant of the Kenyan economist Barack (Hussein) Obama Sr, Barack Obama Jr, before and after his re-election for his office in 2012, succeeded in boosting the US economy by providing stimulus packages for the recovery of the main sectors of the economy necessary to the functioning of the US (Zestos 2016, 103). These packages have proven to be a necessary measure for the US economy and the future survival of NAFTA.

The year 2010 witnessed Canada's gradual decline in the Human Development Index when Canada was ranked 6th. Contrary to Canada, the US showed gradual growth occupying the 4th position in HDI. Both countries were classified as countries with very high human development. Only Mexico showed a significant decline in human development and was ranked among countries with high human development occupying the 57th position (UNDP 2011, 131). The 2011 Democracy Index indicated that Canada and the US were ranked 8th and 19th, respectively. On the one hand, both countries were positioned among countries which have progressed to full democracies. On the other hand, Mexico had made modest progress in its democracy. It was ranked 50th among countries with flawed democracies (EIU 2011, 3-5).

Enrique Peña Nieto's election as Mexico's president in 2012 meant a continuation of the struggle to recover the domestic economy and continue with the transportation of goods from Mexico to Canada and the US. In this sense, the three countries had a delicate task of finding a solution to cope with plunging economies which were manifested in:

'[...] Canada's and Mexico's efforts to diversify their trading partners – account for some of the slower pace. But U.S. policies also applied the brakes to North American integration, including NAFTA's limitations, inefficiencies along the border, and increased security costs after 11th September, 2001' (Council on Foreign Relations – CFR 2014, 33).

In those circumstances, the countries of North America were challenged by the global financial crisis to maintain their co-operation in the domain of automotive protection, intellectual property rights, transportation rules, growing digitisation, and climate changes. It can be said that in the time of Harper's premiership, the global financial crisis could stop the functioning of NAFTA. The global financial crisis was one of the stumbling blocks in the survival of NAFTA as an actor in international relations.

Justine (Pierre James) Trudeau came into power in the year when the global migration crisis emerged. In 2015, the migration issue became the subject of controversial decisions by states both at the domestic and international levels regarding maintaining and optimising regular migrant control at border crossings. For example, '[d]ue to the lack of a decrease in the number of illegal immigrants, the United States decided not to open borders for trucks (at the US-Mexico border), despite the (...) obligation (that) was imposed by the NAFTA regulations' (Wordliczek 2021, 304). The new global crisis at the domestic level was manifested in the implementation of tougher rules and stringent regulations on migration. Unlike the Mexico-US border (la frontera de México y Estados Unidos – EEUU), the Canada-US border was renowned for no border incidents and free crossings between these countries for decades.

The statistics of the HDI 2015 indicated that Canada, together with the US, on the one hand, was ranked among countries with very high human development. According to data, Canada and the US were ranked 10th and 11th, respectively. On the other hand, Mexico was ranked 77th among the countries with high human development (UNDP 2016, 200-201).

Mexico's president Andrés Manuel López Obrador began his term of office in 2018 when the US completely recovered from the global financial crisis and created a new Canada-United States-Mexico Agreement (CUSMA). With his counterpart Donald (John) Trump Sr elected in 2016 as the US president, Obrador had to persuade Trump not to withdraw from NAFTA when he '[...] has tried to avoid conflict with Trump [...]' who qualified immigrants from Mexico '[...] as rapists and drug runners during his 2015-2016 campaign for the U.S. presidency' (Solomon 2020, 2). Obrador held his firm conviction that NAFTA should survive but be replaced with a new agreement. It was CUSMA that was established '[...] after Trump's ascension to the U.S. presidency' (Soroka 2021, 99). Thanks to the unshakeable conviction, Obrador and Trudeau played the role of defending and promoting the idea of the importance of a trade bloc among countries of North America (Lilly 2019, 17).

What is the difference between CUSFTA and NAFTA, on the one hand, and CUSMA, on the other? Compared with CUSFTA and NAFTA, it seems that CUSMA is a broader agreement and one of the most detailed legal documents in the

international agreements and treaties system. With its thirty-four chapters, CUSMA, among other issues, includes intellectual property rights (Government of Canada 2018, 1396-1456). Bearing in mind that CUSMA was established in the digitisation era, the entire agreement contains essential provisions on digital technology use. For example, this is evidenced in Chapter Twenty, dealing with intellectual property rights in the context of digital technology. These provisions are set forth in Article 20.88 under the subtitle 'Internet Service Providers' (Government of Canada 2018, 1449-1450). Regardless of intellectual property rights and digital technology stipulated by CUSMA, a question is raised: What were the indicators of democracy in Canada, Mexico, and the US during the last years of NAFTA existence?

The 2016 Democracy Index indicates that the countries of North America were quite differently positioned. According to the Democracy Index, Canada was the only country which still enjoys prestige among countries of full democracy, occupying the 6th position. As for Mexico and the US, this Index shows that countries in this part of the Americas were categorised as countries with flawed democracies, occupying the 21st and 67th position, respectively (EIU 2017, 7-8).

Both Canada and Mexico felt relieved when Joseph (Robinette) Biden Jr was elected in 2020 and, after the ceremonial inauguration, sworn in the next year as the US president, although he was an influential figure as the US vice president during the Obama era. A few months before the election of Joseph Biden Jr, CUSMA came into force. It marked the beginning of a new era in multi-level relationships among Canada, Mexico, and the US. In 2020, a necessary convergent policy prevailed again in the countries of North America, particularly after Trump's term of office.

According to the 2021 HDI, Canada and the US were highly positioned among countries with very high human development. In 2020, Canada and US were ranked 15th and 21st, respectively. A different HDI score of Mexico is confirmed by its ranking 88th among countries with high human development (UNDP 2022, 272-273). In 2021, Canada, Mexico, and the US ranking in the Democracy Index resulted from the critical and unprecedented changes in international relations. The emergence of the 2020 global health crisis additionally weakened the trust in democracy built long ago as a recognised value which seriously jeopardises inter-state relationships. In the case of North America, the supporting evidence for this claim can be found in the 2021 Democracy Index, which showed that Canada was ranked 12th among countries with full democracy, while the US was ranked 26th among countries with flawed democracy. Only Mexico was categorised and ranked among countries with hybrid regimes, occupying the 86th position (EIU 2022, 12, 14).

Conclusion

Canada's, Mexico's, and the US's onerous task to maintain and protect the idea of North America as a common area can be fulfilled owing to their capability to develop a common trade area and find a common language to define North America as a sub-region. It is assumed that the re-election of Reagan was a crucial moment in defining North America as a large trading area and implementing decisions in compliance with CUSFTA, NAFTA, and CUSMA. The end of the Cold War made it easier for the evolution of a trade bloc of North America without erecting a permanent wall on the Canada-US and the US-Mexico border that could consequently, in the long run, lead to

'[...] rising environmental hazards related to the NAFTA (and later, CUSMA)-induced industrial development that has far outstripped investment in environmental infrastructure' (Cavanagh, Anderson, Serra, and Espinosa 2002, 59).

The industrial development outrunning investment in environmental infrastructure has positive and long-term effects on future intra- and inter-state relationships among countries of North America. Taking into account all countries of this part of the Americas, it appears that they, particularly Mexico and the US, are vulnerable to global crises, which tend to devitalise their democracies. According to the 2022 Democracy Index, Canada is ranked 12th among the countries with full democracies, the US 30th among countries with flawed democracies, and Mexico 89th among countries with hybrid regimes (EIU 2023, 7-9).

Apart from the trend of democratic backsliding both in Mexico and the US, the CUSMA signatory states still demonstrate the political will to further co-operate and co-ordinate their policy in the field of trade, coping with arising fundamental issues. The supporting evidence of how trade is one of the driving forces behind Canada, Mexico, and the US solving their issues, especially ecological ones, is confirmed by the fact that '[...] intermodal rail enhances the overall mix with a cost-effective, low-carbon emissions option with significant capacity' (Doell 2022, 5). The low-carbon emissions are followed by the decarbonisation process and the Fourth Industrial Revolution. All this noticeably impacts North America as a complex whole with the multi-level system of international relations.

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Ivan DUJIĆ

SLOBODNI TRGOVINSKI SPORAZUMI U SEVERNOJ AMERICI

Apstrakt: Definisanje Severne Amerike kao podregiona Novoga sveta od perioda Hladnoga rata do post-hladnoratovskog perioda većiti je problem. Rad se usredsređuje na analizu statusa tri države Severne Amerike od 1980. do 2022. godine. Korišćenjem uporednog metoda, metoda analize sadržaja s pravnog stanovišta i istoriografskog i statističkog metoda, rad nudi odgovor na istraživačko pitanje: Da li Kanada, Meksiko i Sjedinjene Američke Države (SAD) podržavaju ideju o Severnoj Americi kao zajedničkom prostoru? Podeljen na dva perioda -pre i nakon 2001, rad ukazuje na značaj dvostranog sporazuma o slobodnoj trgovini Kanada-SAD zamenjenog trostranim Sporazumom o slobodnoj trgovini među državama Severne Amerike koji je uključivao Kanadu, Meksiko i SAD. Nadalje, Sporazum o slobodnoj trgovini među državama Severne Amerike zamenjen je Sporazumom Kanada-SAD-Meksiko kao konačnom verzijom. Sporazum Kanada-SAD-Meksiko stvoren je u godinama sve većeg stremljenja ka slabljenju demokratije u Meksiku i SAD. Zaključak rada temelji se na rezultatima koji se odnose na ovaj podregion Novoga sveta.

Ključne reči: Sporazum o slobodnoj trgovini Kanada-SAD, Sporazum o slobodnoj trgovini među državama Severne Amerike, Sporazum Kanada-SAD-Meksiko, Severna Amerika, Kanada, SAD, Meksiko, zajednički prostor.

PRIKAZ

Hrišćanski nacionalizam u SAD: priča o moći, granicama i poretku

Milan Veselica¹

Andrew L. Whitehead and Samuel L. Perry, *Taking America Back for God: Christian Nationalism in the United States*, Oxford University Press, Oxford, 2020.

Nije retkost da se hrišćanstvo u određenim zemljama prevodi u narativ o Božijem planu za naciju. Tako se u Nagorno-Karabahu moglo čuti: „Hrišćanska vera može biti stara samo dve hiljade godina u drugim zemljama. Ali za nas, narod Karabaha, Spasitelj je pokazao svetlost tri hiljade godina pre ostalih“ (Kaldor 2007, 157). Na drugom kraju sveta, u Sjedinjenim Američkim Državama (SAD), u južnobaptističkoj crkvi u Južnoj Karolini, predvodnik službe za Dan nezavisnosti je rekao: „Jedino Isus ima moć da promeni našu naciju, on je položio ultimativnu žrtvu za naše živote i za našu naciju“ (Whitehead and Perry 2020, 2). Da li američka nacija zaista jeste ili je nekad bila hrišćanska, česta je tema u literaturi. Jedni joj pristupaju analizom osnivačkih dokumenata i dela očeva osnivača (Harris and Kidd 2011), drugi analizom civilne/građanske religije (Gorski 2017), dok treći nalaze vezu između civilne religije i nacionalizma (Soper and Fetzer 2018). Potpuno drugačiji pristup i pogled nudi knjiga *Taking America Back for God: Christian Nationalism in the United States* (2020) autora Endrjua Vajtheda (Andrew L. Whitehead) i Semjuela Perija (Samuel L. Perry). Autori su profesori i predavači na univerzitetima Klemson (Vajthed) i Oklahoma (Peri) i stručnjaci u oblasti konzervativnog hrišćanstva i američke politike. Knjiga koju predstavljam je dobitnik znamenite nagrade Društva za naučno proučavanje religije (Society for the Scientific Study of Religion) za 2021. godinu.

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Šta je inovativno u ovoj knjizi? Pre svega, istraživački problem. Za Vajtheda i Perija nije važno da li je američka nacija hrišćanska. „Važno je to što značajan broj Amerikanaca *veruje* da ona to jeste. I što značajan broj *veruje* u suprotno“ (Whitehead and Perry 2020, 4). Posledično, ova uverenja oblikuju svetonazore građana, kao i njihove aktivnosti u pravcu menjanja ili očuvanja sveta u kom žive. Drugim rečima, hrišćanski nacionalizam utiče na društveno i političko ponašanje. Tako dolazimo do druge inovativnosti ovog dela. Vajthed i Peri su sprovedi prvo sistematično i empirijsko istraživanje uticaja hrišćanskog nacionalizma na društveno-politički život SAD, koristeći podjednako kvantitativne podatke iz dostupnih baza i kvalitativne podatke dobijene iz pedeset dubinskih intervju sa građanima SAD i posmatranja sa učestvovanjem na relevantnim događajima u Teksasu, Oklahomi i Južnoj Karolini. Naposljetku, autori nude inovativnu konceptualizaciju. Hrišćanski nacionalizam nije isto što i hrišćanski nacionalni narativ. Dok bi, na primer, hrišćanski nacionalni narativ Martina Lutera Kinga (Martin Luther King Jr.) preispitivao nepravедnost postojećeg društvenog poretka, dotle bi hrišćanski nacionalizam koristio hrišćanski nacionalni narativ zarad očuvanja postojećeg društvenog poretka (Whitehead and Perry 2020, 17). Dalje, autori prave razliku između hrišćanskog nacionalizma i desnog autoritarizma (right-wing authoritarianism), „belog evangelikalizma“ („white evangelicalism“) i samog hrišćanstva ili religije, jer se svi ovi termini u javnom govoru, ali i u literaturi, često uzimaju kao sinonimi. Hrišćanski nacionalizam je „kulturalni obrazac – kolekcija mitova, tradicija, simbola, narativa i sistema vrednosti – koji idealizuje i zagovara stapanje hrišćanstva sa američkim građanskim životom“ (Whitehead and Perry 2020, 10).

Knjiga se sastoji od predgovora, zahvalnice, uvoda, četiri poglavlja, zaključka, tri dodatka, popisa endnota, bibliografije i indeksa. U prvom poglavlju, koje se zove *Četiri Amerikanca (Four Americans)*, autori predstavljaju četiri osnovne orijentacije prema hrišćanskom nacionalizmu u SAD i njihovu demografsko-teritorijalnu raspoređenost. „Četiri Amerikanca“ su: Odbacivač (Rejecter), Otporaš (Resister), Prilagodljivac (Accommodator) i Zastupnik (Ambassador). Prema istraživanju *Baylor Religious Survey* iz 2017. godine, Odbacivača ima 21,5%, Otporaša 26,6%, Prilagodljivih 32,1%, a Zastupnika 19,8% u američkoj populaciji. Najvažniji nalaz izložen u ovom poglavlju je prošaranost svih sociodemografskih, etnoreligijskih, političkih i geografskih skupina četirima orijentacijama u odnosu prema hrišćanskom nacionalizmu, što umnogome razbija ustaljene stereotipe. Ipak, u uslovima porasta broja verski neopredeljenih i tzv. skupine „*nones*“ u poslednjih trideset godina, prisutan je trend sporog ali stabilnog opadanja podrške hrišćanskom nacionalizmu (Whitehead and Perry 2020, 46-47).

Drugo poglavlje *Moć (Power)* se detaljnije bavi odnosom hrišćanskog nacionalizma, evangelikalizma i podrške Donaldu Trampu (Donald Trump). Ustaljeno je mišljenje da beli evangelici biraju Trampa. Međutim, zašto bi nakon brojnih skandala i afera evangelici i dalje smatrali da je Tramp branilac porodičnih vrednosti? Odgovor leži u stavu birača prema hrišćanskom nacionalizmu, koji se ne mora nužno poklopiti sa religijskim opredeljenjem. Hrišćanski nacionalisti visoko vrednuju tri ključne stavke na Trampovoj političkoj agendi: viđenje muslimanskih imigranata kao terorističke pretnje, javno iskazivanje patriotizma i suprotstavljanje restriktivnim zakonima o kontroli posedovanja oružja. Najvažniji zaključak ovog poglavlja je „veliki paradoks da hrišćanski nacionalizam i religioznost utiču na američke političke stavove u potpuno suprotnom smeru“ (Whitehead and Perry 2020, 84). Konkretno, što su redovniji na crkvenim službama, češće se mole i čitaju Sveto pismo, Amerikanci bivaju manje zagovornici pomenutih politika. „Pozivanje na hrišćanski nacionalizam, suprotno, uključuje ili pozivanje na vlasnička prava ili pozivanje na oružje, uvek kao odgovor na uočenu pretnju. Ukratko, kod hrišćanskog nacionalizma je sve u vezi sa moći“ (Whitehead and Perry 2020, 86).

Treće poglavlje nosi naslov *Granice (Boundaries)*, što su autori preuzeli od jednog pastora iz kategorije Zastupnika, koji je rekao: „Mislim da je Bog Bog granica“ (Whitehead and Perry 2020, 89). Autori se, stoga, u ovom poglavlju bave time „kako zagrljaj hrišćanskog nacionalizma pruža kulturni materijal koji se koristi za izgradnju zidova oko američkog identiteta, zidova koji isključuju etničke ili verske autsajdere“ (Whitehead and Perry 2020, 91). Drugim rečima, ko su „drugi“ u odnosu na „nas“. Dokazuju kako je hrišćanski nacionalizam najsnažniji prediktor viđenja autsajdera – latinoameričkih imigranata, muslimana, Jevreja, crnaca, Mormona, rimokatolika – kao pretnje po vrednosti, slobodu i fizičku bezbednost (Whitehead and Perry 2020, 112). U svim slučajevima (izuzev stava prema ateistima), visok nivo religioznosti i crkvenosti vodi suprotnom stavu od stavova hrišćanskih nacionalista (Whitehead and Perry 2020, 118).

Četvrto poglavlje *Poredak (Order)* polazi od sledećeg shvatanja jednog Zastupnika: „Bog je na prvom mestu. Muževi i očevi su posvećeni i sarađuju sa svojim ženama u odgajanju poslušne dece. Svako zna svoje mesto. Članovi ovih porodica zatim izlaze u zajednicu i ‘postajemo bolji kao nacija’“ (Whitehead and Perry 2020, 123). Tri pitanja – porodični život, pol i seksualnost – pokazuju kako hrišćanski nacionalizam ne teži uspostavljanju reda samo u javnoj sferi, već i u privatnoj (Whitehead and Perry 2020, 123). Da bi se razumela ne tako jednostavna razlika između stavova religioznog Amerikanca i Amerikanca koji je bliži hrišćanskom nacionalizmu u pogledu homoseksualnosti, transrodnih prava

i razvoda braka, autori zaključuju: „Veza između religije i tradicionalističkih interpretacija porodice, roda i seksualnosti može biti uveliko lična, ali ne mora biti otvoreno politička. Hrišćanski nacionalizam je, međutim, politički u svojoj srži“ (Whitehead and Perry 2020, 148).

U zaključku, autori se osvrću na važnost i perspektivu hrišćanskog nacionalizma u SAD. U osnovi poziva za „vraćanje Amerike Bogu“ nisu verski ciljevi, već obezbeđivanje moći u javnoj sferi, bilo da je u pitanju politička, društvena ili religijska moć. „Hrišćanski nacionalizam je, stoga, u konačnici [priča] o privilegijama“ (Whitehead and Perry 2020, 153).

Naučni doprinos ove knjige je vanredan, ne samo u oblasti politike i religije kao discipline u korpusu političkih nauka, već za društvene nauke uopšte. Bez razumevanja društvenog portreta SAD teško je ispravno zaključivati o nacionalnoj i spoljnoj politici ove zemlje. Upravo nakon čitanja Vajthedove i Perijeve knjige mnogi će shvatiti (među kojima sam i sam) koliko uskogrudih shvatanja i stereotipa o odnosu religije i nacionalizma u SAD se ukorenilo u nauci. Ako je tako u nauci, onda ne treba da nas čudi ista slika u društvenom kontekstu. Stoga, društveni doprinos ove knjige je pružena prilika za *razumevanje* shvatanja i postupaka drugih, što je prvi korak do prihvatanja ili, makar, do neodbacivanja. U duboko podeljenim društvima kao što je američko, naučne studije koje analiziraju poprečni presek društva ne bi trebalo da njime zacementiraju postojeće podele. Smatram da su Vajthed i Peri uspešno izbegli takvu zamku, ali i zamku fatalističkog zagovaranja promena, čime bi se i sami svrstali na jednu od četiri strane. Umesto toga, oni su ukazali na novu nacionalnu temu, koja je, potencijalno, nacionalna tema i drugih država i nacija. Zato knjigu završavaju ključnom rečenicom: „Bez obzira na to da li neko nedvosmisleno odbacuje ili revnosno zagovara hrišćanski nacionalizam, svi se mi borimo sa svojim nasleđem navodno ‘hrišćanske nacije’“ (Whitehead and Perry 2020, 164).

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Journal *International Problems*/Međunarodni problemi publishes the following types of articles:

Original research article presents the results of research with clear contribution with a view of expanding and/or deepening of existing knowledge. It should be structured to include the following elements: general context and aim of research; theoretical background (review literature) clearly stated in the introduction; departing hypothesis or research question; applied methods; presentation and explanation of the results; conclusion discussing the main research findings departing hypothesis or research question.

Review article provides a comprehensive summary of research on a certain topic or a perspective on the state of the field by describing current areas of agreement as well as controversies and debates. Review article identifies gaps in knowledge and the most important but still unanswered research questions and suggest directions for future research.

Book review is a systematic description and/or critical analysis of the quality and significance of a book, edited volume, and textbook. Book review should include a general description of the topic and/or problem addressed by the work in question, summary of the book's main argument, basic biographical information about the author, summary of contents, strengths and weaknesses, as well as a concluding statement summarizing reviewer's opinion of the book. Each book review should refer to at least three other academic sources.

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The paper presents findings of a study developed as a part of the research project “Serbia in contemporary international relations: strategic development directions and strengthening the position of Serbia in international integrative processes – foreign-political, international economical, legal and security aspects“ (No. 179029) for the period 2011–2015, realized by the Institute of International Politics and Economics, and financed by the Ministry of Education, Science and Technological Development of the Republic of Serbia.

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Power, Matthew. 2013. "Confessions of a Drone Warrior", *GQ*, October 22. <https://www.gq.com/story/drone-uav-pilot-assassination>.

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In-text citation:

(Gibbs 2017, A10)

(Power 2013)

(*Economist* 2015)

Audio and visual media

Reference list entry:

Scott, Ridley. [1982] 2007. *Blade Runner: The Final Cut*. Directed by Ridley Scott. Burbank, CA: Warner Bros. Blue-Ray disc, 117 min.

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Tech Legend. 2020. "Best Drones 2020 – Top 8 Best Drone with Cameras to Buy in 2020". Uploaded on February 7, 2020. YouTube video, 27:20 min. https://www.youtube.com/watch?v=Z6_4JU5Mspw.

In-text citation:

(Scott [1982] 2007)

(Future Weapons 2019)

(Tech Legend 2020)

Social media

Reference list entry:

National Library of Australia. 2020. "National Library of Australia's Facebook Page". Facebook, August 1, 2020. <https://www.facebook.com/National.Library.of.Australia/>.
Kruszelnicki, Karl (@DoctorKarl). 2017. "Dr Karl Twitter post." Twitter, February 19, 2017, 9:34 a.m. <https://twitter.com/DoctorKarl>.

Trapara, Vladimir. 2018. "Victory or nil". *Unwrapping the Essence* (blog). May 29, 2018. <https://unwrappingtheessence.weebly.com/blog/pobeda-ili-nista>.

In-text citation:

(National Library of Australia 2020) (Kruszelnicki 2017)

(Trapara 2018)

Doctoral dissertation

Reference list entry:

Rohrbach, Livia. 2020. *Beyond intractability? Territorial solutions to self-determination conflicts*. Doctoral dissertation. Department of Political Science, University of Copenhagen.

Petrović, Miloš. 2018. *Nepotpuna integracija kao prepreka političkom razvoju Istočnog partnerstva Evropske unije*. Doktorska disertacija. Fakultet političkih nauka, Univerzitet u Beogradu.

In-text citation:

(Rohrbach 2020)

(Petrović 2018).

Internet source

If citing an undated online document, give an access date and use the year of access as year of publication.

Reference list entry:

Oxford Library. 2012. "Library Strategy". Oxford Library. Accessed 3 June 2012. <http://www.ol.org/library/strategy.html>.

Google Maps. 2015. "The British Library, London, UK". *Google*. Accessed February 5, 2015. <https://www.google.com.au/maps/place/The+British+Library/@51.529972,-0.127676,17z/data=!3m1!4m2!3m1!1s0x48761b3b70171395:0x18905479de0fdb25>.

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In-text citation:

(Oxford Library 2012)

(Google Maps 2015) (IIPE n.d.)

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In-text citation:

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Reference list entry:

Guzzini, Stefano. 2013. *Power, realism, and constructivism*. Abingdon and New York: Routledge.

TABLES, FIGURES AND GEOGRAPHICAL MAPS

It is necessary to give their number and full title – e.g. *Table 1: Human Development Index among EU members* or *Figure 2: State-Building or Sovereignty Strategy* or *Map 1: Maritime jurisdiction and boundaries in the Arctic region*.

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If the reference list contains two or more items by the same author in the same year, add a, b, etc. and list them alphabetically by title of the work:

Gregory, Derek. 2014a. "Drone Geographies". *Radical Philosophy* RP 183: 7–19.

Gregory, Derek. 2014b. "The Everywhere War". *The Geographical Journal* 177 (3): 238–250.

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¹ Institut za međunarodnu politiku i privredu, Beograd, naučni saradnik, ivona@diplomacy.bg.ac.rs, <https://orcid.org/0000-0003-4052-4426>.

Rad je rezultat naučnog projekta „Srbija u savremenim međunarodnim odnosima: Strateški pravci razvoja i učvršćivanja položaja Srbije u međunarodnim integrativnim procesima - spoljnospolitički, međunarodni ekonomski, pravni i bezbedonosni aspekti” (br. 179029) za period 2011–2015. koji realizuje Institut za međunarodnu politiku i privredu, a finansira Ministarstvo prosvete, nauke i tehnološkog razvoja Republike Srbije.

(1) Anonimizovani fajl sa samim sadržajem članka

- Ovaj fajl treba da sadrži (po sledećem redosledu):
 - Naslov članka;
 - Apstrakt i ključne reči (na srpskom jeziku);
 - Sadržaj samog članka;
 - Listu korišćenih izvora (bibliografiju);
 - Apstrakt i ključne reči (na engleskom jeziku).

Napomena: ovaj fajl služiće za postupak dvostruko anonimnog recenziranja. Kao takav, ne sme da sadrži podatke o autoru ili autorima, direktno ili indirektno, u pogledu imena/prezimen, pola, nacionalnosti, matične ustanove, ili bilo koje druge karakteristike.

FONT, PAGINACIJA

Koristite latinično pismo, font *Times New Roman* veličine 12, prored *Single*, a pasuse odvajajte jednim redom.

Paginacija treba da bude smeštena u donjem desnom uglu i da počinje na prvoj stranici članka.

OBIM

Rukopisi treba da budu obima 6000–8000 reči (uzeto bez apstrakata i spiska referenci). Obim prikaza knjiga može da bude do 1500 reči.

JEZIK

Razmatraju se rukopisi napisani na srpskom i engleskom jeziku. Molba je da se jezik upotrebljava dosledno, koherentno i adekvatno, imajući u vidu akademski opseg Časopisa.

NASLOV

Naslov napišite velikim podebljanim slovima veličine 14.

Naslov treba da bude koncizan i da što vernije opiše sadržaj članka, odnosno da odrazi osnovnu ideju predstavljenog istraživanja i naznači važnost dobijenih rezultata.

APSTRAKTI I KLJUČNE REČI

Apstrakt na srpskom jeziku treba da bude obima od 150–200 reči. Isti apstrakt preveden na engleski stavlja se na samom kraju članka.

Kod originalnih naučnih članaka, apstrakt mora da prikaže predmet i cilj istraživanja, teorijski okvir, osnovne hipoteze ili istraživačko pitanje, korišćen metod, jasan opis najvažnijih rezultata istraživanja, te krajnji zaključak u jednoj rečenici.

Kod preglednih članaka, apstrakt mora da sadrži glavni cilj pregleda dosadašnjih naučnih istraživanja na određenu temu i/ili sistematičnog uvida u trenutno stanje naučne discipline, obrazloženje načinjenog izbora, osnovne rezultate pregleda i izvedeni zaključak, u kojem treba opisati implikacije za dalja istraživanja, primenu ili praksu.

Ispod apstrakta prilažete do 10 ključnih reči na srpskom jeziku koje najbolje opisuju sadržaj članka. Podsećamo da je dobar izbor ključnih reči preduslov za ispravno indeksiranje članka u referentnim periodičnim publikacijama i bazama podataka. Ključne reči ne smeju da ponavljaju reči sadržane u naslovu članka. Ključne reči dajete i na engleskom jeziku i prilažete ih uz apstrakt na engleskom jeziku.

OSNOVNI TEKST

Poravnajte osnovni tekst u skladu sa opcijom *justify*.

Podnaslovi se pišu podebljanim slovima, dok se pod-podnaslovi pišu u *italic*-u; u oba slučaja veličina slova je 12.

Koristite samo tri nivoa podnaslova (svi treba da budu centrirani):

Prvi nivo: **Podnaslov**

Drugi nivo: ***Podnaslov***

Treći nivo: *Podnaslov*

Nemojte numerisati podnaslove.

Svaki novi pasus, uključujući i naslove, treba da bude „uvučen“, što se radi stavljanjem kursora na početak paragrafa i jednim pritiskom na taster *Tab*. To se jedino ne odnosi na apstrakt tj. sažetak. U tekstu moraju biti data puna imena, nikako inicijali. Strano ime i prezime treba pisati u srpskoj transkripciji, a prilikom prvog pominjanja u tekstu navesti u zagradi kako ona glase u originalu.

Imena i prezimena koja potiču iz naroda koji ne koriste latinično pismo treba navesti u latinizovanoj transkripciji (npr. kineska, japanska ili arapska imena i prezimena). Isto važi za nazive različitih vrsta organizacija.

Rukopis mora da bude tehnički uredan, a jezički stil mora da bude jasan, čitljiv i usklađen sa pravopisom i gramatikom srpskog ili engleskog jezika.

Rukopisi koji ne ispunjavaju ove zahteve neće biti uzeti u postupak recenzije.

Ukoliko želite da koristite skraćenicu, onda kod prvog pominjanja punog termina (bilo u apstraktu, bilo u samom tekstu) navedite željenu skraćenicu u zagradi i potom je koristite dosledno u ostatku teksta. Koristite skraćenicu koje su opšteprihvaćene u domaćoj naučnoj i stručnoj literaturi.

Koristite samo sledeći oblik navodnika „ „, a kada se unutar ovih znakova navoda nalaze i dodatni navodnici onda koristite ’ ’.

Latinske, starogrčke i druge strane reči i izraze navodite u kurzivu (*italic*), npr. *status quo*, *a priori*, *de facto*, *acquis communautaire* itd.

NAVOĐENJE IZVORA

Međunarodni problemi koriste navođenje referenci shodno formatu „autor- datum” zasnovanom na Čikaškom stilu – *The Chicago Manual of Style* (16th ed.), delimično dopunjenom shodno potrebama časopisa.

Izvore navodite u samom tekstu, i to tako što u zagradi dajete prezime autora, godinu izdanja i broj stranice (po potrebi). Pun opis izvora dajete u spisku korišćene bibliografije koji stavljate iza osnovnog teksta.

U samom tekstu, izvor uvek treba da stavite neposredno pre znakova interpunkcije. Kada ime autora pominjete u rečenici nije potrebno da ga ponavljate u zagradi, ali onda godinu i broj stranice navodite neposredno nakon pominjanja imena:

Johnson and Axinn (2013, 136) argue that killing with emotions is morally superior to killing without emotions, because military honour demands a clear will to assume a risk of sacrifice of health and life.

Kada je ime autora već u zagradi, koristite uglaste zagrade za navođenje njegovog rada: (opširnije o ovom konceptu videti kod Jovanovića [2013, 133–136]).

Kada u zagradi navodite više izvora, onda ih razdvojte tačkom i zarezmom:

(Jabri 2007; Herman 2004; Rohrbach 2020).

Kada u istoj zagradi navodite dva ili više rada istog autora, onda ne morate da ponavljate njegovo ime:

(Jabri 2007, 2011; Gregory 2014a, 2014b).

Knjiga

Navođenje u Bibliografiji:

Vučić, Mihajlo. 2019. *Korektivna pravda pred Međunarodnim sudom*. Beograd: Institut za međunarodnu politiku i privredu.

Tadjbakhsh, Shahrbanou, and Anuradha Chenoy. 2007. *Human Security: Concepts and Implications*, 2nd ed. Oxon: Routledge.

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Navođenje u tekstu:

(Vučić 2019, 59)

(Tadjbakhsh and Chenoy 2007)

(Vasquez et al. 1995) (Bentham [1907] 2018)

(Dal Lago and Palidda 2010)

(Hayek 2011, 258)

Članak u časopisu

Navođenje u Bibliografiji:

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(Nordin and Öberg 2015, 401)

(Kostić 2019, 500)

(Tracy and Kampf 2020)

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Herman, Michael. 2004. "Ethics and Intelligence After September 2001". In: *Understanding Intelligence in the Twenty-First Century: Journeys in Shadows*, edited by Len V. Scott and Peter D. Jackson, 567–581. London and New York: Routledge.

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Navođenje u tekstu:

(Herman 2004)

(Zakić 2019)

Rad izložen na konferenciji (ako nije objavljen u zborniku sa konferencije)

Navođenje u Bibliografiji:

Korać, Srđan. 2016. "Human Security and Global Ethics: Can International Organizations be Moral Agents?". Paper presented at the Third International Academic Conference on Human Security, Human Security Research Center (HSRC), Faculty of Security Studies, University of Belgrade, Belgrade, November 4–5.

Navođenje u tekstu:

(Korać 2016)

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[Constitution RS] Constitution of the Republic of Serbia. 2006. *Official Gazette of the Republic of Serbia*, No. 98/2006.

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Navođenje u Bibliografiji:

Rohrbach, Livia. 2020. *Beyond intractability? Territorial solutions to self-determination conflicts*. Doctoral dissertation. Department of Political Science, University of Copenhagen.

Petrović, Miloš. 2018. *Nepotpuna integracija kao prepreka političkom razvoju Istočnog partnerstva Evropske unije*. Doktorska disertacija. Fakultet političkih nauka, Univerzitet u Beogradu.

Navođenje u tekstu:

(Rohrbach 2020)

(Petrović 2018).

Izvor sa interneta

U slučaju da navodite nedatirani dokument sa interneta, priložite datum kada ste pristupili tom elektronskom sadržaju i godinu pristupa računajte kao godinu objavljivanja tog izvora.

Navođenje u Bibliografiji:

Oxford Library. 2012. "Library Strategy". Oxford Library. Accessed 3 June 2012. <http://www.ol.org/library/strategy.html>.

Google Maps. 2015. "The British Library, London, UK". *Google*. Accessed February 5, 2015. <https://www.google.com.au/maps/place/The+British+Library/@51.529972,-0.127676,17z/data=!3m1!4m1!4m2!3m1!1s0x48761b3b70171395:0x18905479de0fdb25>.

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Navođenje u tekstu:

(Oxford Library 2012)

(Google Maps 2015) (IMPP n.d.)

Lična komunikacija

Izvori iz područja lične komunikacije obuhvataju razgovore uživo, intervjuje, materijale sa predavanja, telefonske razgovore, klasičnu i elektronsku prepisku. Izvore ove vrste navedite samo u tekstu, bez stavljanja u Bibliografiju, zato što je najčešće reč o podacima u koje čitalac nema uvid ili se zbog nematerijalnog oblika ne mogu naknadno proveriti:

... kao što je dr Slobodan Janković naveo u mejlu koji mi je poslao 10. decembra 2019. godine ...

Kada su objavljena u zbirkama, pisma se navode prema godini izdanja, s tim što datum kada je poslato pojedinačno pismo navodite u samom tekstu:

U pismu koje je Univerzitet u Beogradu 13. maja 2017. godine uputio Grinovoj (Green 2012, 34) ...

Sekundarni izvor (posredno navođenje izvora)

Kada želite da navedete izvor koji ste pročitali u nekom drugom izvoru, uvek treba da ukažete na oba izvora – originalni i posredni:

Navođenje u tekstu:

U knjizi *Moć*, objavljenoj 1975. godine, Luman shvatanje moći pretežno zasniva na literaturi o društvenoj razmeni i moći zajednice (navedeno prema Guzzini 2013, 79).

Navođenje u Bibliografiji:

Guzzini, Stefano. 2013. *Power, realism, and constructivism*. Abingdon and New York: Routledge.

TABELE, DIJAGRAMI I GEOGRAFSKE KARTE

Grafičke priloge (tabele, dijagrame, geografske karte, grafikone i sl.) numerišete i dajete im pun naslov:

Tabela 1: Indeks ljudskog razvoja u zemljama članicama EU

Dijagram 2: Strane direktne investicije kineskih kompanija u Africi (u milionima dolara)

Karta 1: Nacionalne pomorske jurisdikcije i granice na Arktiku

Ukoliko je grafički prilog preuzet od nekog drugog autora ili iz nekog dokumenta neophodno je ne samo navesti izvor, već i dobiti pisanu saglasnost za objavljivanje priloga pre podnošenja rukopisa na razmatranje Uredništvu časopisa *Međunarodni problemi*. Dobijena saglasnost se dostavlja uz rukopis.

BIBLIOGRAFIJA

Na kraju članka, a pre apstrakta na engleskom jeziku, prilažete spisak korišćenih izvora naslovljen **Bibliografija**, koji sme da sadrži samo reference koje ste koristili u tekstu.

Bibliografske jedinice navodite prema prethodno predstavljanim pravilima za navođenje izvora, a ređate ih prema abecednom redosledu.

Ako imate dva ili više radova istog autora objavljenih iste godine, onda uz godinu dodajte slova a, b, c, itd. i ređajte bibliografske jedinice po abecednom redosledu prvog slova naslova rada:

Gregory, Derek. 2014a. "Drone Geographies". *Radical Philosophy* RP 183: 7–19. Gregory, Derek. 2014b. "The Everywhere War". *The Geographical Journal* 177 (3): 238–250.

Rukopisi koji nisu usaglašeni sa navedenim smernicama neće biti uzeti u postupak recenziranja.

Uređivački odbor

UREĐIVAČKA POLITIKA

Međunarodni problemi/International Problems je najstariji naučni časopis u Srbiji i na Balkanu posvećen međunarodnim odnosima. Prvi broj je objavljen u aprilu 1949. godine, samo godinu dana nakon početka rada njegovog izdavača – Instituta za međunarodnu politiku i privredu iz Beograda. Objavljuje se na kvartalnoj bazi i kategorisan je kod resornog ministarstva kao nacionalni časopis međunarodnog značaja (M24).

Međunarodni problemi objavljuju rezultate naučnih istraživanja iz oblasti međunarodnih odnosa, međunarodne bezbednosti, međunarodnog prava i studija globalizacije. *Međunarodni problemi* objavljuju originalne i pregledne naučne radove i prikaze knjiga, na srpskom ili engleskom jeziku, koji prethodno nisu nigde objavljeni niti se nalaze u postupku razmatranja za objavljivanje u nekoj drugoj publikaciji. *Međunarodni problemi* ne objavljuju stručne radove, analitičke komentare niti predloge javnih politika, pa Vas najljubaznije molimo da ne šaljete te vrste članaka.

Uređivački odbor daje prednost analizi kontroverznih pitanja savremene teorije i prakse međunarodnih odnosa uz poštovanje bogatstva disciplinarnih i sazajnih perspektiva. Bez zastupanja konkretnog političkog i teorijsko-metodološkog stanovišta, a sa namerom da podstakne obuhvatniji naučni dijalog o ubrzanim promenama u svetskoj politici u 21. veku, Uređivački odbor smatra da su prioritetne sledeće tematske celine:

- Preobražaj prirode svetske politike u ranom 21. veku;
- Fenomenologija i praksa transnacionalnosti i kosmopolitizma;
- Problemi institucionalizacije međunarodnih odnosa;
- Različita teorijska tumačenja aktuelnih globalnih procesa;
- Kontroverzna pitanja upotrebe spoljnopolitičkih instrumenata vodećih globalnih aktera;
- Uticaj naprednih tehnologija Četvrtе industrijske revolucije na oblikovanje međunarodnih odnosa u 21. veku;
- Civilizacija, religija i identitet u kontekstu svetske politike i globalizacije;
- Konceptualni i metodološki iskoraci izvan tradicionalnog epistemološkog okvira naučne discipline međunarodnih odnosa.

OBAVEZE UREDNIKA, UREĐIVAČKOG ODBORA I IZDAVAČKOG ODBORA

Izdavački savet je savetodavno telo koje aktivno doprinosi razvoju časopisa *Međunarodni problemi/International Problems*. Zadaci i dužnosti članova Saveta su: podrška razvoju časopisa, promocija časopisa, podsticanje stručnjaka u naučnom istraživanju političkih, bezbednosnih i pravnih aspekata međunarodnih odnosa da se uključe u rad časopisa kao autori i/ili recenzenti, pisanje uvodnika, recenzija i komentara o radovima.

Članovi Uređivačkog odbora imaju zadatak da u akademskoj javnosti deluju kao svojevrsni ambasadori časopisa, da pruže doprinos u vidu preporučivanja kvalitetnih autora i rukopisa, podsticanja potencijalnih autora da podnose rukopise za objavljivanje u *Međunarodnim problemima*, te da recenziraju rukopise i pripremaju uvodnike i uredničke komentare.

Glavni i odgovorni urednik odgovara za objavljeni sadržaj i treba da teži stalnom unapređenju časopisa uopšte i procesa osiguranja kvaliteta objavljenog sadržaja, kao i zaštiti slobode izražavanja, integriteta i standarda naučnoistraživačkog rada od upliva političkih, finansijskih i drugih interesa. Glavni i odgovorni urednik treba uvek da objavi ispravku, objašnjenje, obaveštenje o povlačenju članka i izvinjenje.

Glavni i odgovorni urednik donosi konačnu odluku o tome koji će rukopis objaviti na osnovu: 1) ocene njegovog uklapanja u tematski okvir uređivačke politike, 2) ocene naučnog značaja, originalnosti, validnosti i disciplinarnе relevantnosti istraživanja predstavljenog u rukopisu, 3) ocene njegove usklađenosti sa zakonskim propisima koji se odnose na klevetu, kršenje autorskih prava i plagiranje. Glavni i odgovorni urednik zadržava diskreciono pravo da primljeni rukopis proceni i odbije bez recenziranja, ukoliko utvrdi da ne odgovara tematskim zahtevima uređivačke politike i opšteprihvaćenim standardima naučnoistraživačkog rada (tj. ako ne sadrži strukturne elemente originalnog ili preglednog naučnog rada). Radovi koji ne zadovoljavaju tehničke standarde propisane Uputstvom za autore, čak i u slučaju da je sadržaj korektan, biće vraćeni autorima na usklađivanje. U redovnim okolnostima, Uređivački odbor obaveštava autora u roku od sedam dana od datuma prijema rukopisa o tome da li se tema rukopisa uklapa u uređivačku politiku i da li je pokrenut postupak recenziranja.

Novi glavni i odgovorni urednik ne sme da preinači odluku svog prethodnika o objavljivanju rukopisa, osim ukoliko nisu utvrđene nove činjenice koje ukazuju na sporan kvalitet tog rukopisa.

Glavni i odgovorni urednik, njegov zamenik i članovi Uređivačkog odbora ne smeju da budu u bilo kakvom sukobu interesa u vezi sa rukopisima koje razmatraju. Iz postupka izbora recenzenata i odlučivanja o sudbini rukopisa isključuju se članovi Uređivačkog odbora kod kojih postoji sukob interesa. Ako takav sukob interesa postoji, o izboru recenzenata i sudbini rukopisa odlučuje glavni i odgovorni urednik.

Glavni i odgovorni urednik, njegov zamenik i članovi Uređivačkog odbora su dužni da blagovremeno prijave postojanje sukoba interesa.

Glavni i odgovorni urednik, njegov zamenik i Uređivački odbor dužni su da sud o rukopisu donesu na osnovu njegovog sadržaja, bez rasnih, polnih/rodnih, verskih, etničkih ili političkih predrasuda.

Glavni i odgovorni urednik, njegov zamenik i članovi Uređivačkog odbora ne smeju da koriste neobjavljen materijal iz predatih rukopisa za svoja istraživanja bez izričite pisane dozvole autora, a informacije i ideje iznete u predatim rukopisima moraju se čuvati kao poverljive i ne smeju da se koriste za sticanje lične koristi.

Glavni i odgovorni urednik, njegov zamenik i članovi Uređivačkog odbora dužni su da preduzmu sve razumne mere kako bi identitet recenzenata ostao nepoznat autorima pre, tokom i nakon postupka recenzije i kako bi identitet autora ostao nepoznat recenzentima.

OBAVEZE AUTORA

Autori garantuju da rukopis predstavlja njihov originalan doprinos, da nije objavljen ranije i da se ne razmatra za objavljivanje na drugom mestu. Predavanje istog rukopisa u više časopisa predstavlja kršenje etičkih standarda koji se odnose na naučnoistraživački rad i takav rukopis se isključuje iz daljeg razmatranja.

Autori takođe garantuju da nakon objavljivanja u časopisu *Međunarodni problemi* rukopis neće biti objavljen u drugoj publikaciji na bilo kom jeziku bez saglasnosti Instituta za međunarodnu politiku i privredu kao nosioca autorskih prava. Takođe, rad koji je već objavljen u nekom drugom časopisu ne sme biti podnet za objavljivanje u *Međunarodnim problemima*.

Prilikom slanja rada, autor(i) šalju potpisanu Izjavu autora, čiji je sadržaj dostupan ovde: [https://internationalproblems.rs/wp-content/uploads/doc/izjava-autora-\(mp-email\)-02.pdf](https://internationalproblems.rs/wp-content/uploads/doc/izjava-autora-(mp-email)-02.pdf)

U slučaju da je poslati rukopis rezultat naučnoistraživačkog projekta ili da je, u prethodnoj verziji, bio izložen na skupu u vidu usmenog saopštenja (pod istim ili sličnim naslovom), detaljniji podaci o projektu, konferenciji i slično, navode se u fusnoti na samom početku teksta.

Autori su dužni da se pridržavaju etičkih standarda propisanih Kodeksom ponašanja u naučnoistraživačkom radu (Nacionalni savet za nauku i tehnološki razvoj, 2018). Autori garantuju da rukopis ne sadrži neosnovane ili nezakonite tvrdnje i ne krši prava drugih. Izdavač neće snositi nikakvu odgovornost u slučaju ispostavljanja bilo kakvih zahteva za naknadu štete.

Sadržaj rada

Rad treba da sadrži dovoljno detalja i referenci kako bi se recenzentima, a potom i čitaocima omogućilo da provere tvrdnje koje su u njemu iznesene. Namerno iznošenje netačnih tvrdnji predstavlja kršenje etičkih standarda propisanih Kodeksom ponašanja u naučnoistraživačkom radu. Prikazi knjiga moraju da budu činjenično tačni i nepristrasni.

Autori snose svu odgovornost za sadržaj predatih rukopisa i dužni su da, ako je to potrebno, pre njihovog objavljivanja pribave saglasnost svih lica ili institucija koje su neposredno učestvovalе u istraživanju koje je u rukopisu predstavljeno.

Autori koji žele da u rad uključe ilustracije, tabele ili druge materijale koji su već negde objavljeni obavezni su da za to pribave saglasnost nosilaca autorskih prava i da ih dostave uz rukopis, a ne naknadno. Materijal za koji takvi dokazi nisu dostavljeni smatraće se originalnim delom autora.

Autorstvo

Autori su dužni da kao autore navedu samo ona lica koja su suštinski doprinela sadržaju rukopisa, odnosno dužni su da sva lica koja su suštinski doprinela sadržaju rukopisa navedu kao autore. Navođenje kao jednog od autora rukopisa lica koje nije učestvovalo u izradi istraživanja sadržanog u rukopisu predstavlja kršenje etičkih standarda koji se odnose na naučnoistraživački rad. Rukopisi sa više od dva autora neće biti uzimani u razmatranje, osim izuzetno ukoliko se proceni da rukopis predstavlja rezultate opsežnog empirijskog istraživanja.

Ako su u suštinskim aspektima naučnog istraživanja predstavljenog u rukopisu i/ili u samoj pripremi rukopisa učestvovali i druge osobe koje nisu autori, njihov doprinos mora da bude naveden u napomeni ili zahvalnici.

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Autori su dužni da ispravno navedu izvore koji su bitno uticali na istraživanje sadržano u rukopisu i na sam rukopis. Informacije koje su dobili u privatnom razgovoru ili korespondenciji sa trećim licima, prilikom recenziranja prijava projekata ili rukopisa i slično, ne smeju se koristiti bez izričite pisane dozvole izvora.

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Recikliranje teksta, odnosno situacija u kojoj isti autor upotrebljava istovetne delove svog teksta u dva ili više svojih objavljenih radova, predstavlja kršenje etičkih standarda koji se odnose na naučnoistraživački rad i izdavaštvo.

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Ukoliko je utvrđeno postojanje podudaranja teksta manjeg obima, od autora se može zatražiti da ponovo napiše sporan deo teksta i da navede prethodno objavljen izvor iz kojeg je taj deo teksta preuzet – ako to već nije učinio. Autor ne može da opravda recikliranje teksta samo na osnovu činjenice da je naveo izvor iz kojeg je preuzeo taj deo teksta. Podudaranje delova teksta u značajnom obimu predstavlja osnov za odbijanje rukopisa. Prilikom postupanja u slučajevima recikliranja teksta glavni i odgovorni urednik i Uređivački odbor rukovode se smernicama i preporukama Odbora za etiku u izdavaštvu (*Committee on Publication Ethics* – COPE, https://publicationethics.org/files/Web_A29298_COPE_Text_Recycling.pdf).

Sukob interesa

Autori su dužni da u radu ukažu na finansijske ili bilo koje druge sukobe interesa koji bi mogli da utiču na iznesene rezultate i interpretacije.

Greške u objavljenim radovima

U slučaju da autori otkriju važnu grešku u svom radu nakon njegovog objavljivanja, dužni su da momentalno o tome obaveste urednika ili izdavača i da sa njima sarađuju kako bi se rad povukao ili ispravio.

Predavanjem rukopisa redakciji *Međunarodnih problema* autori se obavezuju na poštovanje navedenih obaveza.

OBAVEZE RECENZENATA

Recenzenti časopisa *Međunarodni problemi/International Problems* su dužni da stručno, argumentovano, nepristrasno i u zadatim rokovima dostave uredniku ocenu naučne vrednosti rukopisa.

Recenzenti ocenjuju usklađenost teme rukopisa sa tematskim okvirom časopisa, naučnu relevantnost istraživane teme i primenjenih metoda, originalnost i naučni značaj rezultata predstavljenih u rukopisu, stil naučnog izlaganja i opremljenost teksta naučnom aparaturom.

Recenzent koji ima osnovane sumnje ili saznanja o kršenju etičkih standarda propisanih Kodeksom ponašanja u naučnoistraživačkom radu od strane autora dužan je da o tome obavesti glavnog i odgovornog urednika. Recenzent treba da prepozna važne objavljene radove koje autori nisu citirali. On treba da upozori glavnog i odgovornog urednika i na bitne sličnosti i podudarnosti između rukopisa koji se razmatra i bilo kojeg drugog objavljenog rada ili rukopisa koji je u postupku recenzije u nekom drugom časopisu, ako o tome ima lična saznanja. Ako ima saznanja da je isti rukopis razmatra u više časopisa u isto vreme, recenzent je dužan da o tome obavesti glavnog i odgovornog urednika.

Recenzent ne sme da bude u sukobu interesa sa autorima ili finansijerom istraživanja. Ukoliko postoji sukob interesa, recenzent je dužan da o tome momentalno obavesti glavnog i odgovornog urednika.

Recenzent koji sebe smatra nekompetentnim za temu ili oblast kojom se rukopis bavi dužan je da o tome obavesti glavnog i odgovornog urednika. Glavni i odgovorni urednik uvažiće zahtev autora da određeni pojedinac ne bude recenzent njihovog rukopisa ako proceni da je taj zahtev valjano obrazložen i praktičan.

Recenzija mora biti objektivna. Sud recenzenata mora biti jasan i potkrepljen argumentima. Uputstvo za recenzente detaljnije propisuje merila i smernice za ocenu rukopisa.

Rukopisi koji su poslani recenzentu smatraju se poverljivim dokumentima. Recenzenti ne smeju da koriste neobjavljen materijal iz predatih rukopisa za svoja istraživanja bez izričite pisane dozvole autora, a informacije i ideje iznesene u predatim rukopisima moraju se čuvati kao poverljive i ne smeju se koristiti za sticanje lične koristi.

POSTUPAK RECENZIJE

Radovi koji se razmatraju za objavljivanje u časopisu *Međunarodni problemi/ International Problems* podležu recenziji. Cilj recenzije je da glavnom i odgovornom uredniku pomogne u donošenju odluke o tome da li rad treba prihvatiti ili odbiti i da kroz proces komunikacije sa autorima poboljša kvalitet rukopisa. U normalnim okolnostima, rok za okončanje postupka recenziranja je 30 dana od datuma prijema rukopisa.

Recenzije su dvostruko anonimne – identitet autora je nepoznat recenzentima i obrnuto. Identitet recenzenata ostaje nepoznat autorima i obrnuto pre, tokom i nakon postupka recenzije. Glavni i odgovorni urednik garantuje da će pre slanja rukopisa na recenziju iz njega biti uklonjeni lični podaci autora (prvenstveno ime i afilijacija) i da će preduzeti sve razumne mere kako bi identitet autora ostao nepoznat recenzentima. Tokom čitavog procesa, recenzenti deluju nezavisno jedni od drugih. Recenzentima nije poznat identitet drugih recenzenata. Ako odluke recenzenata nisu iste, glavni i odgovorni urednik može da traži mišljenje drugih recenzenata.

Izbor recenzenata spada u diskreciona prava glavnog i odgovornog urednika. Recenzenti moraju da raspolazu relevantnim znanjima u vezi sa oblašću kojom se rukopis bavi; oni ne smeju da budu iz iste institucije kao autori rukopisa niti smeju da sa njima imaju nedavno objavljene zajedničke radove.

Glavni i odgovorni urednik šalje podneti rukopis zajedno sa obrascem recenzije dvojici recenzenata koji su stručnjaci za naučnu oblast kojoj pripada tema rukopisa. Obrazac recenzije sadrži niz pitanja na koja treba odgovoriti, a koja recenzentima ukazuju koji su to aspekti koje treba obuhvatiti kako bi se donela odluka o sudbini rukopisa. U završnom delu obrasca, recenzenti moraju da navedu svoja zapažanja i predloge kako da se podneti rukopis poboljša.

Glavni i odgovorni urednik može da tokom postupka recenzije zahteva od autora da dostavi dodatne informacije (uključujući i primarne podatke), ako su one potrebne za ocenu naučnog doprinosa rukopisa. Glavni i odgovorni urednik i recenzenti moraju da čuvaju takve informacije kao poverljive i ne smeju ih koristiti za sticanje lične koristi.

U slučaju da autor ima ozbiljne i osnovane zamerke na račun recenzije, glavni i odgovorni urednik će proveriti da li je recenzija objektivna i da li zadovoljava naučne standarde. Ako se pojavi sumnja u objektivnost ili kvalitet recenzije, glavni i odgovorni urednik će tražiti mišljenje dodatnog recenzenta.

POSTUPANJE U SLUČAJEVIMA NEETIČNOG PONAŠANJA

Glavni i odgovorni urednik *Međunarodnih problema* je dužan da pokrene odgovarajući postupak ukoliko razumno sumnja ili utvrdi da je došlo do povrede etičkih standarda propisanih Kodeksom ponašanja u naučnoistraživačkom radu – bilo u objavljenim člancima ili u još neobjavljenim rukopisima. Svako može da u bilo kom

trenutku prijavi glavnom i odgovornom uredniku sumnju o postojanju povrede etičkih standarda uz dostavljanje valjanih dokaza.

Glavni i odgovorni urednik će u dogovoru sa Uređivačkim odborom odlučiti o pokretanju postupka koji ima za cilj proveru iznesenih navoda i dokaza. Tokom tog postupka svi izneseni dokazi smatraće se poverljivim materijalom i biće predloženi samo osobama koje su neposredno uključene u postupak. Autorima za koje postoji razumna sumnja da su prekršili etičke standarde biće data mogućnost da odgovore na predložene dokaze i iznesu sopstvenu argumentaciju.

Glavni i odgovorni urednik u saradnji sa Uređivačkim odborom – i, ako je to potrebno, grupom stručnjaka – okončava postupak tako što donosi odluku o tome da li je došlo do povrede etičkih standarda. U slučaju da je postupkom utvrđena povreda, ona se istom odlukom klasifikuje kao lakša ili teža. U teže povrede etičkih standarda ubrajaju se plagijat, lažno autorstvo, izmišljanje i krivotvorenje podataka i/ili naučnih rezultata i ekstenzivno autoplagiranje (preko 50% od ukupnog teksta rukopisa ili objavljenog članka).

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- U slučaju teže povrede etičkih standarda ili dva ili više puta ponovljene lakše povrede, autorima se izriče zabrana objavljivanja u trajanju od pet do deset godina;
- Objavljivanje saopštenja ili uvodnika u kojem se opisuje utvrđen slučaj povrede etičkih standarda;
- Slanje službenog obaveštenja neposrednom rukovodiocu i/ili poslodavcu prekršioca;

Upoznavanje relevantnih naučnih i stručnih organizacija ili nadležnih organa sa slučajem kako bi mogli da preduzmu odgovarajuće mere.

Prilikom postupanja u slučajevima neetičnog ponašanja glavni i odgovorni urednik i Uređivački odbor se rukovode smernicama i preporukama Odbora za etiku u izdavaštvu (<http://publicationethics.org/resources/>).

PLAGIJARIZAM

Plagiranje – odnosno preuzimanje tuđih ideja, reči ili drugih oblika kreativnog izraza i predstavljanje kao vlastitih, bez navođenja autora ili izvora – predstavlja grubo kršenje etičkih standarda u izdavaštvu i propisanih Kodeksom ponašanja u naučnoistraživačkom radu. Plagiranje može da uključuje i kršenje autorskih prava, što je zakonom kažnjivo. **Rukopisi koji se razmatraju za objavljivanje u časopisu *Međunarodni problemi/ International Problems* mogu biti podvrgnuti antiplagijatskoj proveru.**

Plagiranje obuhvata sledeće:

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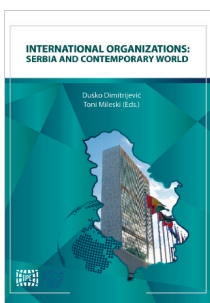
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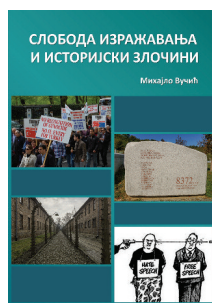
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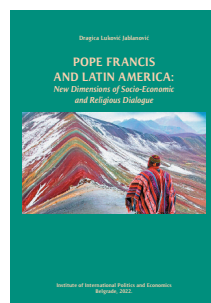
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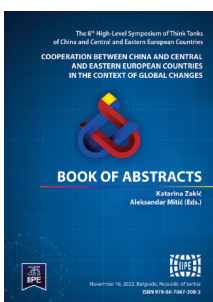
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