



Sodobni vojaški izzivi

Contemporary Military Challenges

Znanstveno-strokovna publikacija Slovenske vojske

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MINISTRSTVO ZA OBRAMBO
GENERALŠTAB SLOVENSKE VOJSKE

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E-naslov urednice
Managing Editor
e-mail address liliana.brozic@mors.si

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Ali sodobni varnostni izzivi res potrebujejo povsem nove pristope?

»Edina resnična varnost v življenju je v zavedanju, da vsak dan postajamo boljši. Ne skrbi me prihodnost, saj zanjo vsak dan nekaj storim.«

Anthony Robbins

Do Contemporary Security Challenges Really Require Entirely New Approaches?

»The only true security in life comes from knowing that every single day you are improving yourself in some way. I do not worry about the future because I take care of it every day«.

Anthony Robbins

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UVODNIK

Spoštovani bralke in bralci!

Pred vami je tretja številka Sodobnih vojaških izzivov. Izhodiščna tema, ki smo jo načrtovali v lanskem programu dela uredniškega odbora in o kateri smo želeli zvedeti in prebrati kaj več, so bile vloga Republike Slovenije v mednarodnih integracijah in njene priložnosti v regiji Jugovzhodne Evrope, s poudarkom na Balkanu.

Od takrat se je sodobno varnostno okolje ponovno spremenilo, nastale so nove okoliščine, razmere, krize in priložnosti. Spremembe se kažejo različno, v različnih delih sveta in na različnih področjih.

Z izbiro člankov v tej številki smo se želeli odzvati na nekatere izmed njih. Ugotovitve in spoznanja avtorjev v mednarodni zasedbi so tako zanimivo branje z več področij, hkrati pa tudi navdih za iskanje novih zamisli in rešitev.

Kje torej začeti na področju varnosti? Pri državi. Ta ima različne vzvode moči. Nekatere mora, druge pa lahko uporabi pri organizaciji in uresničevanju nacionalne varnosti, ki si je danes in tudi v prihodnje ne moremo predstavljati kot sestavnega dela mednarodne varnosti.

Igor Kotnik se je vzvodom moči države in njenemu ravnanju z njimi posvetil v članku *Upravljanje instrumentov nacionalne moči*, v katerem predstavlja raznolikost njihove moči, zmožnost njihovega povezovanja, končne cilje, interese države itn.

Trdi, da so instrumenti moči države tisti pomembni dejavnik preventive, ki mu je treba nameniti največ pozornosti. Njihovo temeljno poslanstvo je ohranjanje miru, varnosti in stabilnosti. Možnost ukrepanja je na drugem mestu.

Kurdská vstaja in sirská kriza je članek avtorja **Georgiosa Protopapasa**, ki nas seznanja s sirsko krizo in možno vstajo Kurdov v Siriji. Tak scenarij bi lahko spremenil meje Sirije in sosednjih držav. Avtor tako analizira nekatere vidike možnosti nastanka velikega Kurdistanu.

Jerzy Stańczyk v članku *Poljska sodobnim izzivom razvoja in varnosti naproti* razmišlja o različnih varnostnih težnjah ter njihovem vplivu na poljsko in širše varnostno okolje ter o integriranem nacionalnovarnostnem sistemu na Poljskem kot možnem odzivu nanje.

Vlogo finančnih virov pri uveljavljanju sodobne varnostne paradigme na obrambnem področju v izbranih državah predstavlja **Gregor Garb**. Prikazuje in primerja smernice financiranja obrambnih sistemov petih držav – Republike Slovenije in njenih sosed.

Peter Álmos Kiss v članku z naslovom *Obveščevalna dejavnost in nova paradigma vojskovanja* proučuje nove trende v obveščevalni dejavnosti. Ali gre res za nove trende ali so to morda že preizkušene metode in pristopi, ki smo jih z razvojem tehnologije postopoma že opustili?

Težaven položaj vodnika: tehtanje med občutkom pripadnosti in socialno kohezijo v mirovni operaciji je tema, ki jo predstavlja **Claus Kold**. Na konkretnem primeru danskega vodnika piše o razlikah med načinom komuniciranja pri častnikih in podčastnikih.

Toliko v tej številki. Kot je že navada, vabimo k pisanju vse avtorje, ki bi z nami in drugimi lahko delili svoje znanstvene in strokovne izkušnje. Na koncu publikacije so navodila za pisanje. Vemo, da se na področju varnosti dogaja veliko zanimivega. Tisti, ki imate to priložnost in privilegij, da aktualne dogodke spremljate osebno, delite jih z nami, še posebno, če se iz vaših izkušenj lahko tudi drugi kaj naučimo.

EDITORIAL

Dear readers,

You are looking at the third issue of Contemporary Military Challenges. Initially, the topic that was planned to be discussed within the Editorial Board's programme of work drafted last year was the role of the Republic of Slovenia in international structures and its opportunities in the region of south-eastern Europe, with special emphasis on the Balkans.

Since then, the contemporary security environment has changed again. New circumstances, situations, crises and opportunities have arisen. These changes manifest themselves in various forms, in various parts of the world and in various areas.

The selection of articles in this issue aims at responding to some of them. The findings and insights of international authors thus offer interesting reading on different topics and at the same time inspire the search for new ideas and solutions.

So where to start when it comes to security? With the state. The state possesses various levers of power. Some of them it can and some of them it has to use in the organisation and provision of national security, which can neither now nor in the future be perceived as a constituent of international security.

State's levers of power and their handling are discussed in the article '*Orchestrating the instruments of national power*' by **Igor Kotnik**. The author presents the varying strength of their power, the possibilities of their interrelation, final goals, the state's interests, etc. He claims that the state's instruments of power are an important factor of prevention and thus have to be devoted adequate attention. Their basic mission is to preserve peace, security and stability. The possibility to act comes second.

'*Kurdish awakening and the Syrian crisis*' is the article by **Georgios Protopapas**. The author acquaints us with the Syrian crisis and potential Kurdish awakening in Syria. Such scenario could change the borders of Syria and its neighbouring countries. The author analyses some of the possibilities for the formation of Greater Kurdistan.

Jerzy Stańczyk in his article '*Poland towards the contemporary challenges*' presents and reflects upon various security trends and their impact on the security environment in Poland and beyond, as well as discusses the integrated national security system in Poland as a possible reaction to them.

Gregor Garb writes about '*The role of financial resources in establishing contemporary security paradigm in defence area for the selected countries*'. He presents and compares the guidelines for financing defence systems of five countries – the Republic of Slovenia and its neighbours.

Peter Álmos Kiss in his article '*Intelligence and the new paradigm of warfare*' studies new intelligence trends. Are these really new trends or are they perhaps the already tested methods and approaches that have been gradually suspended as technology developed?

'*The troubled position of a Sergeant: mediating between esprit de corps and social cohesion in a peace operation*' is the subject presented by **Claus Kold**. The author writes about the differences in communication with officers and non-commissioned officers, relying on the case of a Danish Sergeant.

This is what this issue has to offer. As usually, we invite all the interested authors to write and share their scientific and professional experiences with us and our readers. The instructions to authors can be found at the end of the publication. We are well aware that a lot of interesting developments revolve around security. Those of you, who have the opportunity and the privilege to follow them personally, are kindly invited to share them, particularly, if they can be informative for the rest of us.

UPRAVLJANJE INSTRUMENTOV NACIONALNE MOČI

ORCHESTRATING THE INSTRUMENTS OF NATIONAL POWER

Povzetek Država mora upravljati instrumente nacionalne moči ob upoštevanju varnostnega okolja v okviru trenutnega procesa vzpostavljanja ravnotežja moči v mednarodni skupnosti. Ob stalnem medsebojnem sodelovanju si države in drugi akterji prizadevajo uresničevati svoje (nacionalne) interese prek odnosov vplivanja ali prisile. V ozadju obeh pristopov so različni instrumenti nacionalne moči, ki jih je mogoče razumeti na tradicionalen ali bolj celovit in prilagodljiv način. Tradicionalni pristop, ki temelji na treh ali štirih instrumentih, je še posebno neustrezen, ko si želimo ustvariti vtis o nacionalni moči držav v razvoju in na novo nastajajočih velikih sil. Nyejevo razlikovanje med trdo in mehko močjo sledi tradicionalnemu konceptu treh (štirih) instrumentov (sredstev) nacionalne moči, vendar pa hkrati uvaja tri različne načine njihovega "prodajanja" – trdo, mehko in bistroumno moč. Skladno s celovitim in bolj prilagodljivim razumevanjem instrumentov nacionalne moči predlagam, da vseh deset instrumentov nacionalne moči razumemo kot primerne za uporabo v obliki vpliva (mehko) ali prisile (trdo), pa tudi na bistroumen način, kot edinstveno mešanico prvih dveh, v kateri mora mehka moč prevladati nad trdo močjo, kolikor dolgo je to mogoče in sprejemljivo.

Ključne besede *Instrumenti nacionalne moči, država, nacionalni interes, sodobno varnostno okolje, cilji, načini, sredstva, vpliv, prisila, trda moč, mehka moč, bistroumna moč.*

Abstract The State has to orchestrate the instruments of national power regarding security environment within the on-going process of establishing balance of power in the international community. In continuous interplay, states and other actors try to implement their (national) interests through influence or coercion relationships. In behind of both approaches there are different instruments of national power which could be understood in traditional or more comprehensive and flexible way. Traditional approach, based on three or four instruments, is particularly incorrect if someone would like to get an impression about national power of developing states and newly

emerging powers. Nye's differentiation between hard and soft power in fact follows traditional concept of three (four) instruments (*means*) of national power, but at the same time he is introducing three different *ways* of "selling" – hard, soft and smart. According to comprehensive and more flexible understanding of the instruments of national power I suggest that all ten instruments of national power are suitable to be projected in influential (soft) or coercive (hard) way and also in a smart way, as a unique mixture of the first two, in which soft power should prevail over hard power as long as possible and acceptable.

Key words *Instruments of national power, the "State", national interest, contemporary security environment, ends, ways, means, influence, coercion, hard power, soft power, smart power.*

Preface The process of globalization in all its forms has made the world more interconnected and interdependent, but still it is not common and unique in all its dimensions, including that of security.

Regarding security environment it is necessary to differentiate between diverse security settings, but there is an immense need to shift from previous distinction of "national" and "international" to the distinction of "non-national us" as a broader and at the same time more blurred social categories of networks, partnerships and alliances and "others" still out of them. First, one needs to be aware of what is happening regarding our strengths and weaknesses in the internal environment, influencing our ability to deal with not just security risks and threats, but also opportunities in our external environment in a timely and effective manner.

In security sector, we should be wise enough not to concentrate just on risks and threats but also to understand the great potential of opportunities. Only by following this kind of mindset it is possible to completely understand the importance of dilemma how states should best orchestrate the instruments of national power to provide for their long-term security and influence whilst protecting the common interests and advancing the shared values.

1 UNDERSTANDING THE TOPIC

To better understand the aforementioned topic and dilemma, it could be divided and analysed through distinguishing between desired ends of the subject and ways and means to achieve these ends. The question is about states which are very different, so it is wise to narrow our focus to the very concept of a state. Thus the subject is "the State". Providing long-term security of "the State" is one of its main objectives or main ends.¹ This can also be regarded as one of the most important national interests. To achieve its objectives, "the State" has in its possession the instruments or means of national power.² When thinking about best orchestrating these state's instruments

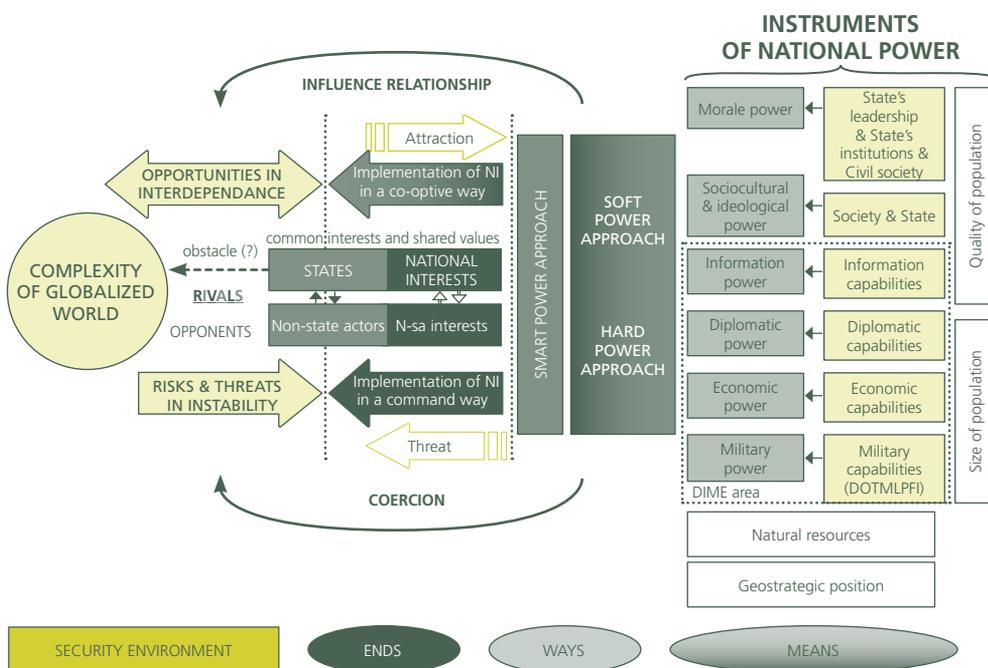
¹ *It is not just about defence but about security. This is far wider concept within which it is preferable not just to think about addressing potential or actual threats but also about exploiting possible opportunities.*

² *Power is the ability to influence the behaviour of others to get outcomes one wants. (Nye, 2004, p. 2)*

it is about ways. The dilemma also points out a concept of influence which at the first glance seems to be one of the ends, but in fact it is just one of the possible ways towards the desired ends. Everything else in the dilemma is about wider environment and two side ends - protecting the common³ interests and advancing the shared values⁴ supporting dilemma's main end.

In the process of dividing and analyzing this multi-layer strategic dilemma and as an attempt to conceptualize this complex issue, I designed scheme 1, within which I tried to summarize my perceptions and conclusions.

Scheme 1: Interplay of ends, ways and means of "the State" in the process of providing its long-term stability and security in the contemporary security environment



Created by Dr. Igor Kotnik, RCDS Course

States are still main actors in the international relations and reports of its end have been greatly exaggerated. (Dictionary of International Relations, 1998, p. 512-513) They could be hardly perceived as a uniform category. Besides it seems that in last decades it has become even less uniform as it had been in the past. We face a phenomenon of increasing; let us borrow this term from the ecology, "states' biodiversity". To avoid dealing too much with particularities of different states, I decided "the State", as a neutral concept, is in the centre of our attention. Particularly because there

³ When the term "common interests" is used, it refers wider and above, not just national interests.

⁴ At this point, it is appropriate to think about a difference between interests and values. Indirectly, the difference between both, interests and values, is implied in the wording "common interests" and "shared values".

is the dilemma if this rich diversity of states, with a rising number of small states, is an advantage or disadvantage or even obstacle for the international community.

2 CONTEMPORARY SECURITY ENVIRONMENT

Contemporary security environment is diverse, complex and dynamic. For some people this is threatening by itself, because they would much more prefer an environment full of similarity, simplicity and predictability. But the approach of seeing and admitting just the threats we are familiar with, those that suit our concepts and plans, or those we can afford to deal with considering our available resources should be avoided. Instead, we must recognize and accept the complexity of contemporary and future security issues and deal with them in a comprehensive manner. Our response, however, should not be limited just to the national or state security or even not just to its defence, but it should be extended to the concept of human security. Nevertheless, thinking this way, one should not forget that the state provides indispensable institutional framework for a society and its members. For this reason, state security will always matter as one of the core elements of a more modern and comprehensive concept of human security. And when talking about this overwhelming security approach, we are not focusing on risks and threats caused by instability in globalized world anymore, but we preserve a broader view and, in addition to (potential) enemies, we recognize, understand and harness opportunities of global interdependence.

Baechler (in Goetschel, 1998, p. 270) refers to Holsti (1988) according to whom global interdependence and role of international institutions⁵ may be the reason why there has never in the world history been a parallel to the present situation in which states with such extreme differences in population size, politico-military potential and socio-economic development would coexist in a stable situation of mutual peace and national autonomy. Obviously, it is about global interdependence and international institutions. But the achievement and preservation of coexistence and stability are in fact ongoing processes of establishing the balance of power. So the right reason for a balanced world is hidden deeper and is thus less visible. First, it is about sharing and living some fundamental values of conduct within the societies and international community. And second, it is about the willingness of states to submit their narrow national interest in certain or at least, to some degree, common interests of international community or at least narrower alliances or partnerships. In fact, this is all about the states' (predominantly big and powerful ones) ability of self-reflecting their own vital and non-vital national interests, their empathic perception of interests of other states and, above all, their inner strength of self-containment.⁶

⁵ *Institutions can enhance a country's soft power.* (Nye, 2004, p. 10)

⁶ *Power is not good or bad per se. It is like calories in a diet: more is not always better. Too much power (in terms of resources) has often proved to be a curse when it leads to over-confidence and inappropriate strategies.* (Nye, 2010)

In the international community, there is a continuous interplay of different states and actors. Their relationships are of different kind and could be divided, according to congruity of their interests, into relationships between allies, partners, friends, rivals,⁷ opponents and enemies. This could be regarded as a continuum of congruity of interests. Each responsible actor tends to have as many allies, partners and friends as possible, and as little opponents and, predominantly, enemies as possible.

The relationships between these actors are very diverse in their contents and intensity, but are always about the implementation of their (national) interests.⁸ States try to implement their interests in two very distinctive ways – through influence relationship or coercion relationship, depending on where on the continuum of congruity of interests the other party of relationship lies. In behind of both approaches there are different instruments of national power.

3 INSTRUMENTS OF NATIONAL POWER – FROM TRADITIONAL TO COMPREHENSIVE APPROACH

Common understanding of the instruments of national power is that these are all of the means available to the government in its pursuit of national objectives. The traditional approach towards instruments of national power differentiated just three of them – military, economic and diplomatic power. Recently, the fourth one – information power⁹ – has been added, forming the well-known acronym of DIME.¹⁰ However, it is still impossible to describe and understand particular state's position in the international community just by considering these four instruments of national power. Jablonsky (2010, p. 126) suggests that national power is composed of various elements, also referred to as instruments or attributes. The author suggests grouping them into two categories based on their applicability and origin - "national" including geography, resources and population and "social" including economic, political, military, psychological and informational instrument. Even though labelling of these two categories is not the best one, some instruments are not named precisely enough and some are missing, I still consider this approach more complete and fair in comparison with the traditional ones.

The approach with just four instruments of national power is particularly incorrect if one would like to get an impression about national power of developing states

⁷ *Rivals are an interesting and unpredictable in-between category, which could, predominantly according to our relationship towards them, turn both ways – to become our friends or opponents.*

⁸ *It is important to be constantly aware of this, because it often seems that relationships are about something completely different. But they are certainly not!*

⁹ *The ability to share information – and to be believed – becomes an important source of attraction and power. (Nye, 2004, p. 31) Despite this statement, the author does not perceive information as a distinctive type of power but just as a part of soft power.*

¹⁰ *DIME – Diplomatic, Information, Military and Economic.*

and newly emerging powers which are maybe not highly rated regarding these four instruments but have, indeed, some other contemporary important advantages, which have lately made them more visible and more respected. It seems as though this traditional four-element conceptualization of national power could be regarded as a “developed-centric approach” including just the elements which are to the best advantage for developed states (military, economy, diplomacy and information technology) and completely abandoning those which are not so strong any more (geostrategic position¹¹) or are even weak (natural resources¹², size of population).¹³ Thus, I suggest to widen our view and to take into consideration all these before mentioned and some other at least for us important instruments of national power – namely quality of population, socio-cultural and ideological instrument¹⁴, morale¹⁵ - presented all together with their inter-relations more precisely in the scheme 2.

Instruments of national power could be divided into two groups. The objective one joins the instruments which are completely (geostrategic position and natural resources), predominantly (size of population) or partially (quality of population) out of influence of actual authorities of the state. Subjective instruments of national power are, on the other hand, those which actual authorities of the state are capable to shape completely or at least partially (quality of population) according to the state’s interests, political ambitions and will.

¹¹ *Some actors have power or at least a part of it just because of their position on the globe (pirates in Somalia, Turkey, UK, South Africa ...)*

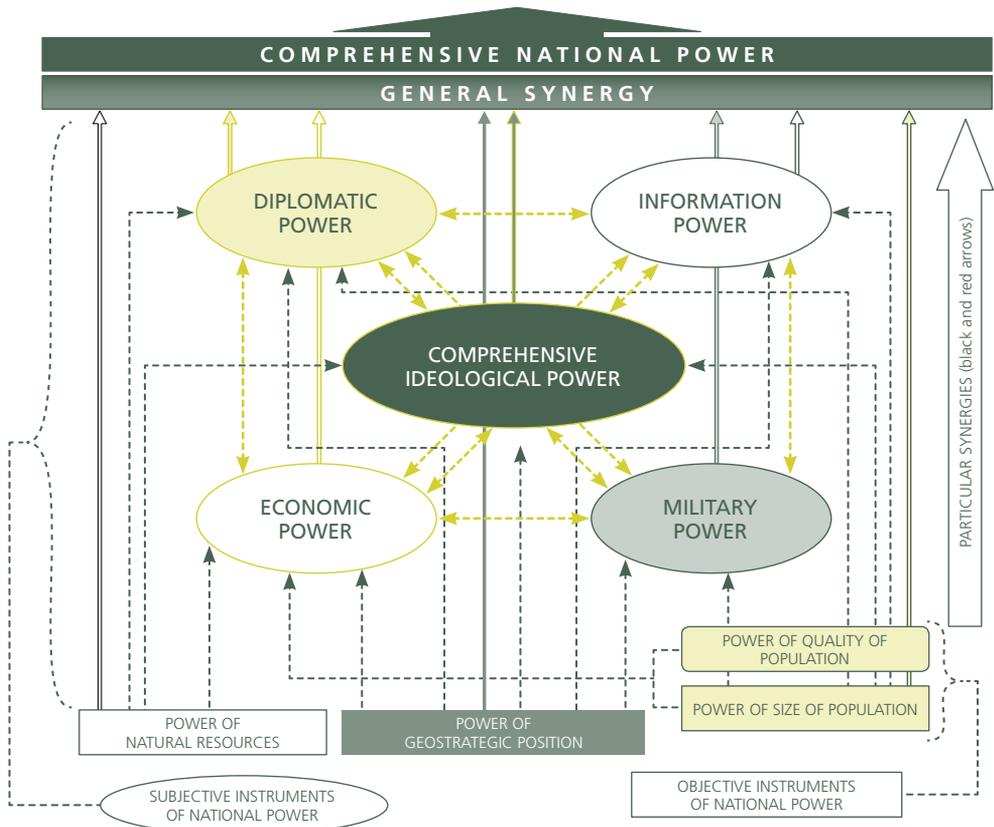
¹² *Natural resources are nowadays, when we cope with their increasing scarcity, per se an instrument of national power. So it is not possible to agree any more with Nye (2004, p. 12) that “coal and steel are not major power resources if a country lacks an industrial base”. It is true that, in the past, natural resources were just a potential, if they were not activated. This is in fact the main difference in comparison with the economic power, which represents activated and utilized natural resources. But today, just a possession of natural resources represents an important tool of national power and influence. However; even Nye indirectly (2004, p. 14) admits that natural resources are an important tool of national power claiming that “...some hard-power assets such as armed forces are strictly governmental; others are inherently national, such as oil and mineral reserves, ...”.*

¹³ *Some actors have power or at least a part of it just because of being in possession of important natural resources (Gulf states or Nigeria because of oil), size of population (China, India ...), moral power of their leadership (Saudi Arabia with two Muslim holy cities) or that of their population (Afghanistan with their people with incredible will to persist and resist).*

¹⁴ *If a country’s culture and ideology are attractive, others more willingly follow. (Nye, 2004, p. 10) We perceive socio-cultural and ideological power as outwards oriented power of the society, produced within the society but also reflecting from the society to its environment. Similar by origin but completely different by effect is the moral power, which is also produced within the society but is predominantly oriented inwards to strengthen the society against outer influences and pressures. In its extreme emanation it also reflects to the environment of the society as a special source of deterrence.*

¹⁵ *Socio-cultural and ideological power and morale power are of central importance while influencing all other four subjective instruments of national power. In its developed, upgraded form it is not just about nation’s ability to persists in a determined direction and resist any kind of pressures, but at the same time also about nation’s ability to preserve openness for the feedbacks from the environment and flexibility in searching for most effective reactions.*

Scheme 2:
Comprehensive national power as an outcome of synergy of instruments of national power



Created by Dr. Igor Kotnik, RCDS Course 2010/2011.

National power is not just about size or scope of the instruments of national power, but also about their quality, usefulness of each of them and quality of their combination in realisation of the envisioned ends. These ten¹⁶ instruments of national power contribute to the comprehensive national power, each of them separately and at the same time through their mutual dual interplays (marked with thin black and red arrows) providing particular synergies, which at the end all together provide general synergy of instruments of national power.

I would like to point out that all instruments of national power are relevant, although in different degrees in different contexts, predominantly depending on the features of key actors and their desired outcomes. At this point, it is right to emphasize that the instruments of national power are not an end in themselves. They are the tools of state politics and used to directly or indirectly control and manipulate our environment and provide

¹⁶ In this scheme, I integrated socio-cultural, ideological and morale instrument in a single, comprehensive instrument, combining state's leadership, its institutions and civil society, not to make the presentation over-complicated.

basic goods for the state, society and its citizens – (1) long-term stability and security, (2) democracy and liberties and (3) economic prosperity and welfare.

4 DIFFERENTIATION BETWEEN HARD AND SOFT POWER

Another conceptualisation of national power has been proposed by Nye (2004) as a differentiation between hard and soft power. According to our understanding, it represents *the bridge* between the means of national power and the ways in which they are used. When his two schemes of the power itself and three types of power (Nye, 2004, p. 8, 31) are combined, one can see that the author in fact follows the traditional concept of three instruments (means) of national power. On the one side, he regards the military and the economy as hard power¹⁷ and, on the other side, diplomacy backed by socio-cultural and ideological elements as soft power. So at first, it seems he is just offering a well-known product in a nicer package. But in fact, it is more than that, because at the same time he is introducing the idea of how to sell. In fact, he commences with two different *ways* of “selling” - hard and soft - and at the end adds the third, the smart one, as an unlimited number of possible combinations of the initial two ways.

According to Nye (2004, p. 15, x, 1, 5), soft power is the ability to get the outcomes we want without having to force people to change their behaviour through threats and coercion (stick in the form of military power) or payment (carrot in the form of economic power). Instead of sticks and carrots, which represent hard power, it is better to rely on attraction and seduction based on country’s culture, political ideals and policies.¹⁸ Soft power in fact rests on the ability to shape the preferences of others.¹⁹ At this point, I would like to warn not to mix or exchange the terms of power and force, because they are not synonyms at all.

Nye (2004, p. 7) believes that hard and soft powers are related, because they are both the aspects of the ability to achieve one’s purpose by affecting the behaviour of others. The distinction between them is one of *degree*, both in the nature of the behaviour and in the tangibility of the resources. In this respect, he differentiates between command power – the ability to change what others do – and co-optive power – the ability to shape what others want. Here it is quite obvious that hard and soft powers are no longer just synonyms for hard and soft means of national power, but rather two distinctive ways in which different means of national power can be utilized.

¹⁷ This conclusion can also be derived from Nye’s (2004, p. 14) statement that “...some hard-power assets such as armed forces are strictly governmental; others are inherently national, such as oil and mineral reserves...”.

¹⁸ In pursue of their national interests European small states have to rely predominantly on soft power. But in doing so, they have to be patient. As Harvey (2010, p. 8) wisely stated “sustaining and strengthening a country’s soft power is a cumulative process, with long-term benefits appearing gradually.”

¹⁹ But at the same time Nye (2004, p. 6) himself warns us that “soft power is not merely the same as influence. ... It is also ability to attract ... in behavioural terms soft power is attractive power.”

5 FLEXIBLE UNDERSTANDING OF THE INSTRUMENTS OF NATIONAL POWER

At this point, I suggest accepting the view that all ten instruments of national power ((1) morale, (2) socio-cultural and ideological, (3) information, (4) diplomatic, (5) economic and (6) military power, (7) natural resources, (8) geostrategic position, (9) size and (10) quality of population) are suitable to be projected in an influential (soft) or coercive (hard) way and also in a smart way, as a unique mixture of the first two. Which way to choose in establishing influence relationship, coercion relationship²⁰ or smart relationship, depends on the particular context²¹ and desired ends.²² Even Nye (2004, p. 26) admits this between the lines when he states that “hard power can sometimes have an attractive or soft side”. So instruments of “hard” power can also be used in a soft way and vice versa, instruments of “soft” power also in a hard way. It is thus possible to establish an influence relationship and attraction through military power, if our military is so well organized, trained and equipped that, to others, it represents a kind of a “role model” to be followed or is used as a “common good” such as a tool for humanitarian assistance. Similarly, it is possible to establish coercion relationship and threat by moral power, if it is highly aggressive and used for nurturing fear and backing hate speech like in North Korea.

Nye (2004, p. 3) argues that practical politicians and ordinary people (sic!) often turn to a simple definition of power as the possession of capabilities or resources that can influence the outcomes. I disagree with this characterisation of ordinary and simple. It is just a broader and more concrete understanding of power. The same author also thinks, when defining power as a synonym of the resources it produces, there is a paradox that those best endowed with power do not always get the outcomes they want. But it is always the case that the mere possession of something does not necessarily grant success. Some states can have huge and very professional military, but are still not producing the desired outcomes. It is not a paradox per se, but very similar to the difference between potential (static) and kinetic (dynamic) energy in the physics. So it would be wrong to claim that potential energy does not exist and

²⁰ *On the contrary, some authors (Dictionary of international relations, 1998, p. 447) suggest to distinct between influence relationship and power relationship. In my opinion, this approach is not the right one, because it suggests that influence requires something else than power. In fact, power lies in the very basement of any relationship, because we always back our interference in social dynamics with some kind of power. What makes difference is (1) type of power used, (2) quantity and intensity of power and (3) the way of use of particular sort of power. This is in fact implied in the statement that “influence is then, in one sense, a non-coercive form of power” (Dictionary of international relations, 1998, p. 447, 249). Influence relationships, in this non-coercive sense, are likely to be particularly prevalent among allies, coalition partners and actors with “special relationships”, like UK and USA (Dictionary of international relations, 1998, p. 249, 506-508). Thus it is not possible to differentiate sharply and precisely between hard and soft instruments of power, despite some are by nature more “hard” (geostrategic position, natural resources, size of population, military, economic) and other more “soft” (quality of population, diplomatic, information, socio-cultural and ideological, morale).*

²¹ *The effectiveness of any power resource always depends on the context in which the relationship exists. (Nye, 2004, p. 2, 12)*

²² *I believe we can for example use geostrategic position in a soft way by allowing others to pass and use it or to cooperate in exploitation of our territory in an extent which exceeds normal obligations according to international law. But geostrategic position can be used in a hard way by limiting or denying someone’s access and holding a position just for us, imposing some conditions of passing by blackmailing, or even by letting others to use it for direct or indirect pressure on third party.*

affect the environment, because it is not observable in a similar way as the kinetic one. Again, I believe it is preferable to follow a broader definition, which embraces more traditional as well as contemporary conceptualizations of power, acknowledging that in the interplay of hard and soft power, the latter one is gaining importance. This is especially true in the times of open-conflict absence between great powers or as US Secretary of Defense Robert Gates stated “Military alone cannot win the peace”. (Steele, 2008, p. 3) Similarly, Nye (2004, p. xii) has written: “Winning the peace is harder than winning a war, and soft power is essential to winning the peace.”

Conclusion Our future is about providing comprehensive human security and common interests not just by addressing potential or actual threats in coercive relationships by containing, deterring, low- or high-intensity intervening, but also by preventing threats and exploiting opportunities in influence relationships. Because of huge diversity of states and their interests, there are no widely valid and indisputable answers to how instruments of national power should be best orchestrated. Nevertheless, it is wise to conclude that it is essential to approach security issues cautiously and comprehensively, both while assessing and (re)acting, always with a gradual and sometimes simultaneous use of two or even more instruments of national power. We have to behave as conductors - orchestrating all instruments of national power in a well-balanced and well-tuned, smart way in which soft power will prevail over hard power as long as possible and acceptable.

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KURDSKA VSTAJA IN SIRSKA KRIZA

KURDISH AWAKENING AND THE SYRIAN CRISIS

Povzetek Sirska kriza ustvarja razmere za kurdsko vstajo v občutljivi regiji Bližnjega vzhoda. Avtor v članku poskuša analizirati možnosti za kurdsko revolucijo, ki bi lahko spremenila meje Bližnjega vzhoda z oblikovanjem velikega Kurdistanu. Za razumevanje širše problematike Kurdistanu uporabi tri glavne parametre, ki so povezani z regionalno politiko in medsebojnimi odnosi. Prvi parameter je problem Kurduv v Turčiji in vloga separatistične organizacije, imenovane Delavska stranka Kurdistanu (PKK). Drugi parameter je iraški Kurdistan na severu države, deloma avtonomna pokrajina, ki bi lahko pomenila predhodnico velikega Kurdistanu, tretji parameter pa je povezan z možnostjo, da kurdska manjšina ustvari avtonomno kurdsko enklavo v Siriji. Vendar pa ni zaznati očitne in usklajene namere različnih kurdskih skupnosti, da skozi vsesplošno vstajo ustanovijo veliki Kurdistan.

Ključne besede *Kurdske manjšine, Delavska stranka Kurdistanu (PKK), Kurdska regionalna vlada (KRG), kurdska vstaja ali revolucija.*

Abstract The Syrian crisis has been creating the preconditions for a Kurdish awakening in the sensitive region of the Middle East. The paper tries to analyse the prospects for Kurdish revolution that could redraw the borders of the Middle East with the creation of the “Greater Kurdistan”. The understanding of the greater Kurdish matter is approached through three significant parameters that relate to the regional politics and correlations. The first parameter is the Kurdish problem in Turkey and the role of the separatist organisation called “Worker Party of Kurdistan” (PKK), the second one is the Iraqi Northern Kurdistan a semi-autonomous region that could be used as precursor of the “Greater Kurdistan” and the third one relates the possibility of the Kurdish minority to create an autonomous Kurdish enclave in Syria. Nonetheless, there is no apparent and coordinated effort by the different Kurdish communities towards the creation of the Greater Kurdistan through a general uprising.

Key words *Kurdish minorities, Worker Party of Kurdistan (PKK), Kurdish Regional Government (KRG), Kurdish awakening or revolution.*

Introduction The Arab Spring has dramatically affected the balance of power in the Middle East. The revolution of the Arab world has had an impact on the policies of regional powers for the control of the entire region. Certain winners are the casts of Sunni Muslims (variations of conservative Islamist movements) who had been oppressed by dictators for decades and the big losers are the authoritarian regimes (Egypt, Libya and Tunisia) who fell by the storming revolutions of the Arab Spring. However the puzzle of these uprisings has not been completed as Syrian rebels are continuing to battle against the forces of the president Bashar al - Assad. The crisis of Syria could subsequently incite the awakening of Kurds¹, the stateless largest ethnic group in Middle East, who live under minority status in Turkey, Iran and Syria.

The breakdown of the regime of Damascus could create a Kurdish enclave in the territory of Syria putting Kurdish populations to the forefront of regional politics for the following reasons, Firstly, the Kurdish minority of Syria has created a unified front and it has managed to protect its region from the fight between the rebels and Assad. Secondly, the Kurds retain ethnic and religious characteristics that separate them from the rebels of the Free Syrian Army; in fact they have not participated in the revolution and they have shown restraint towards the Syrian state. A possible fall of the Assad may work as a triggering event for the realisation of their cause, even in Syria. Thirdly, a total revolution of Kurds in the Middle East could have only a common aim, the establishment of a “Greater Kurdistan” that will provoke the redrawing of the borders in Middle East. Subsequently, Turkey and Iran will lose parts of their territory to their Kurdish minorities², who in turn will form the “Greater Kurdistan” that will also include the Kurdish semi-autonomous region of Northern Iraq. The number of Kurdish population worldwide, according to CIA World Fact book is 30 million; moreover the native communities are organised into solid populations that are spread in the greater geographical area of the Minor Asia and Middle East, comprising territories in Turkey, Iraq, Iran, Syria and Armenia (Roy, 2011).³

The effect of the Kurdish issue in the regional chessboard of the Middle East could be analysed via: (a) the complex Kurdish problem in Turkey and the role of

¹ *The revolution of the Kurdish minorities could lead to the creation of a “Greater Kurdistan” that includes territories from Turkey, Iran, Syria, Iraq.*

² *The Kurdish minorities have been oppressed by secular authoritarian regimes for many years. There are Kurdish minorities in Turkey, Syria, Iran and Iraq.*

³ *Treaty of Sèvres, (Aug. 10, 1920), post-World War I pact between the victorious Allied powers and representatives of the government of Ottoman Turkey. The treaty abolished the Ottoman Empire and obliged Turkey to renounce all rights over Arab Asia and North Africa. The pact also provided for an independent Armenia, for an autonomous Kurdistan, and for a Greek presence in eastern Thrace and on the Anatolian west coast, as well as Greek control over the Aegean islands commanding the Dardanelles. Rejected by the new Turkish nationalist regime, the Treaty of Sèvres was replaced by the Treaty of Lausanne in 1923. (<http://www.britannica.com/EBchecked/topic/536839/Treaty-of-Sevres>)*

separatist organisation Worker Party of Kurdistan⁴ (PKK) which has been waging an armed cause for more than thirty years against the government of Ankara (b) the importance of the Iraqi Kurdistan as a semi-autonomous region that could be used as precursor of “Greater Kurdistan” (c) the preconditions for the awakening of Syria’s Kurdish minority and its strategy to create an autonomous Kurdish enclave and (d) the prospect of a total Kurdish uprising to achieve a “Greater Kurdistan” that will provoke dramatic changes in the borders of Middle East.

1 TURKEY AND THE COMPLEX KURDISH ISSUE

The Kurdish issue has been playing a vital role to the formation of the Turkish domestic politics and has been defining the terms of Ankara’s foreign policy in the Middle East. The worst possible scenario for Ankara is the creation of a Kurdish state that could encompass territories from Turkey, Iran and Syria.

The oppression of Kurdish minority by the state was based on the dogma of “Turkishness”⁵; a Turkish secular nationalistic idea that emphasises solemnly on Turkish identity and tolerates no other, with the exception of Turkish. It is not a new idea, as it started with the revolution of the Young-Turks that resulted the establishment of the modern Turkish state. The first big Kurdish action against the authoritarian state of affairs took place in 1925 and it was crushed by violent and bloody reaction; however passions have never truly subsided. In 1984, the Kurdish separatist movement appeared again in the form of the Worker Party of Kurdistan (PKK) which has been designated as terrorist group by Turkey, the US and the European Union. The bloody war between Turkish state and PKK has provoked so far more than 40.000 casualties, and it subverts the prospect for a peaceful solution. PKK is the most notorious enemy for Ankara’s government because the Kurdish organization has been fighting an armed struggle against state authorities for an autonomous Kurdistan and for the promotion of the legal rights of Kurdish minority.

The government of the prime – minister of Turkey Recep Tayip Erdogan announced in July 2009 the “Kurdish Initiative”, a political action that granted several rights to Kurdish minority (Unver Noi, 2012)⁶, in order to achieve a peaceful resolution.

⁴ *The major Kurdish organisation in Turkey who wages a bloody guerrilla war against Turkey’s state. PKK has the ability to influence the outcome of the Kurdish issue inside Turkey and it maintains military bases in Iraqi Northern Kurdistan.*

⁵ *Turkey adopted a new Penal Code in 2005. Articles 300-302 of Turkey’s new Penal Code replaced similar provisions of the 1926 Penal Code. Article 301 outlawed even speech that, for example, could be construed as “insulting Turkishness. Communication from The Commission to The European Parliament And The Council, “Enlargement Strategy and Main Challenges 2010-2011, TURKEY 2010 Progress Report” Brussels, 9 November 2010 SEC(2010) 1327 pp 20, 32 (http://ec.europa.eu/enlargement/pdf/key_documents/2010/package/tr_rapport_2010_en.pdf)*

⁶ *“The initiative marked the achievement of several rights for Kurds, 1) the use of formerly Kurdish titles for districts was permitted; 2) legal barriers for speaking Kurdish during prison visits were eliminated; 3) Kurdish language and literature departments at various universities were established; 4) giving Kurdish names to Kurdish children was permitted; 5) TV channels broadcasting in the Kurdish language were allowed”. (Michael M. Gunter (2011), Kurdish nationalism in the aftermath of the Arab Spring, Foreign Policy(http://mideast.foreignpolicy.com/posts/2011/11/08/kurdish_nationalism_in_the_aftermath_of_the_arab_spring))*

Despite the intentions of this opening policy at the end it did not produce successful results due to the embedded distrust between the government and the Kurdish political leaders. In parallel, the hard-line elements of the PKK challenged the correctness of the wish of Abdullah Ocalan (the imprisoned leader of PKK) for a political agreement. The hardliners feared that an agreement without the participation of PKK could weaken the influence of the organisation on the Kurdish population in the southeast provinces of Turkey. PKK has maintained bases and military camps in North Iraqi Kurdistan and their fighters can easily wage inroads in Turkish territory.

In July 2011 Kurds decided to propose a plan for the creation of the “Democratic Autonomous Kurdistan Model” - within the Turkey’s borders in order to self-govern their south-eastern regions. The Congress for a Democratic Society (DTK), a platform for Kurdish associations and movements, together with the main Kurdish Party Peace and Democracy Party (BDP) presented the aforementioned plan declaring that the Kurds do not want to live any longer without status. The 850 delegates of the DTK, proclaimed a “democratic autonomy” for the peaceful resolution of the Kurdish question.⁷

The negotiations between the Turkish government and PKK are theoretically the best solution from the Turkish government point of view. Nevertheless, there is still an inconsistency in the policy of the Turkish government towards this issue: On the one hand, PKK is a terrorist organisation for the Turkish population and it has been killing thousands of them. Orhan Miroglu, a prominent Kurdish author, argues “that the PKK’s war is no longer the war of the Kurds but that of others. This is to say that the PKK has become a war machine, a proxy of other wars in the region” (Dagi, 2012). On the other hand the government of Ankara hesitates to negotiate with the PKK since it does not want to displease the majority of the Turkish citizens. Furthermore no government in Turkey would survive if it decides to discuss with the PKK out of weakness during the time of a violent aggressive campaign against Turkish targets (Dagi, 2012). This signifies the military power of the PKK that significantly influences stability in the southeast regions of Turkey. Any military action by Turkey has failed to restore control. Perhaps, as an alternative dispute resolution to the problem, which insofar is not manageable by force, the Turkish state could resort to measures that aim to incorporate the isolated eastern regions following EU principles by which it has to abide as an EU candidate country. Accordingly, the passion of the Kurdish minority for freedom and the protection of their rights could perhaps abate with the implementation of a integrated investments, growth and development policy of the south – eastern provinces. Better standard of living of Kurdish minority would reduce the influence of PKK that exploits the poverty and the hopelessness of the population making it successful to recruit new fighters.

⁷ *Pro-Kurdish independent deputy Aysel Tuğluk told reporters in a declaration that the Kurdish people had declared democratic autonomy while remaining loyal to the national unity of Turkey, respecting the country’s territorial integrity and basing their move on democratic national principles. She also referenced international human rights documents that allowed them to do so. (Kurdish group declares democratic autonomy within Turkey’s borders, Zaman Newspaper, 14 July 2011 (<http://www.todayszaman.com/news-250503-kurdish-group-declares-democratic-autonomy-within-turkeys-borders.html>))*

Moreover the government could take some political initiatives as a basic precondition to win the “hearts and minds” of the Kurdish population, such as lending greater support to Kurdish citizens and reviewing the controversial articles of the new Constitution (Esayan, 2012). Whereas Turkey could even bring up know how from the EU, it failed to do so. The Turkish political scene does not favour the conciliations among the parties and the plethora of ethnic and religious minorities (e.g. Christians, Alevis that combine Anatolian folk Shi’ism with Sufi elements, Arabs, Kurds, various Islamic groups etc) because of the lack of a particular social contract (Bacik, 2012). According to Gokhan Bacik (2012) the *“Turks and political parties are locked in themselves. Since none of these groups has the ability to establish a social contract none serious problem of Turkey’s, such as the Kurdish one or the one related to the status of the Alevis, can be resolved. As things stagnate, each group is poised to annihilate the others. Thus, the Turkish political scene is one of the most lethal in the present-day world”*.

The conflict between Turkey and PKK takes a new dimension because of the Syrian crisis and the role of Syrian Kurdish minority who could struggle for an autonomous enclave. Turkey’s political elite is concerned with the growing presence of the Syrian Democratic Union Party (PYD), which has close relations with the PKK, in the Kurdish areas of northern Syria (Dombey - Fielding, 2012). The prime-minister of Turkey Recep Erdogan warned that Turkey won’t hesitate to intervene militarily in Syria’s north region, i.e. the Kurdish territories (Today Zaman, 2012). Whether this could be effective is questionable: A brutal wave of PKK counterattacks could stem from the Iraqi North Kurdistan and from Syrian Kurdish areas and could produce catastrophic effects on the military plans of the Turkish army for the extermination of PKK.

2 THE POLICIES OF THE IRAQI NORTHERN KURDISTAN

The Iraqi Northern Kurdistan is the first semi-autonomous Kurdish territory in the Middle East and it is ruled by the Kurdistan Regional Government (KRG) of the president Massud Barzani. The latter has the ability to influence the regional balance of power. Barzani is involved in the policies of Syrian Kurds and at the same time discusses with Turkey for the “problem” of the PKK. The independent political and military structures of the Iraq’s Northern Kurdistan supported by the revenue from its oil fields increase its leverage and its status among the Kurdish populations in the Middle East. The Northern Kurdistan behaves as a “mini-state” that could be perhaps the hub for a state that would include the Turkish, Syrian and Iranian Kurdish minorities living in the greater region.

The creation of the Iraqi Northern Kurdistan has its roots in the Gulf War 1991 where the UN-authorized coalition forces led by the United States attacked the Iraqi forces in response to Iraq’s invasion and annexation of Kuwait. After Iraqi forces suppressed an initial post-war Kurdish uprising, in mid-1991, the U.S. and the allied forces established a “no-fly zone” over the Kurdish areas, protecting the Kurds (Katzman,

2010). The US attack on Iraq in 2003 contributed to a large extent to the creation of Kurdish Northern Iraq as the Iraqi Kurds became equal members on the new political scene, participating thus in decision- making regarding the future of the state.

The new Iraqi Constitution grants considerable political and territorial rights to the Kurds (Unver Noi, 2012)⁸ who greatly suffered under the regime of Saddam Hussein. The central government of Baghdad and the KRG have a long – running dispute for the revenue and the management of the oil fields located in the Iraqi Kurdistan. On the one hand, Baghdad maintains that it has every legal right to centrally manage any oil resources located in Iraq. On the other hand, the KRG unilaterally challenges the authority of Baghdad, signing agreements with international oil companies. The basic explanation that the KRG signs these contracts with international companies stems from the delayed revenue transfers from the central government (Erbas, 2012).

According to Denise Natali (2012) *“one of the unintended consequences of the KRG’s zealous energy-sector development and maximalist territorial ambitions has been the strengthening and the manifestation of the Iraqi nationalism. Instead of forming a regional Sunni Muslim alliance, Iraqi Sunni Arab groups have reacted against Kurdish overreach by forming together with the Iraqi Prime Minister Nouri Maliki in an anti-Kurdish block. The recent reconciliation between Maliki and key Sunni Arab leaders such as Salih al-Mutlak and Qutayba al-Jaburi, as well as Sunni Arab tribes in Kirkuk and Mosul, reflects this reactionary trend and the constraints it poses to increased Kurdish autonomy”*.

The leader of KRG, Massud Barzani has been presented as power- broker in the Kurdish complex regional policies. On the one hand, Barzani has criticised the campaigns of attack from PKK and it does not desire the PKK to exert influence among Iraqi Kurds. On the other hand, KRG tolerated the use of the Iraqi territory by his compatriots in PKK. Nevertheless Northern Iraq maintains political and economic relations with Turkey and it has access to the western markets (Marcus, 2012). However Barzani can use the PKK as a tool to exert pressure in Ankara as the attacks from PKK on the Turkish targets in southeast provinces provoke political and social tension inside Turkey.

In parallel Barzani is also involved in the Syrian Kurdish political scene as he has managed to reconcile the two rival Kurdish groups: the Kurdish National Council (KNC) and the Democratic Union Party (PYD), which have relations with the PKK (Marcus, 2012). Moreover Barzani stated that the KRG is training Syrian Kurdish fighters in North Iraq who will be sent back to Syria to defend their territorial areas (Affar, 2012). The KRG is playing its own political game in the Kurdish issue and maybe it seems quite probable that has already calculated the reactions of the regional powers concerned by the prospect of creation of a “Greater Kurdistan”.

⁸ *The constitution not only retained substantial Kurdish autonomy but also included the Kurds’ insistence on “federalism,” providing them with a regional government. The constitution recognizes the three Kurdish provinces of Dohuk, Irbil, and Sulaymaniyya as a legal “region” of the KRG, with the power to amend the application of national laws not specifically under national government purview, to maintain internal security forces, and to establish embassies abroad. In addition, Arabic and Kurdish are the official languages. (Unver Noi, 2012)*

My view is that a greater Kurdistan will be not be realised in immediate future unless the Kurdish Northern Iraq becomes an independent state that will work as hub and metropolis. Northern Iraq will undoubtedly become the main and first Kurdish hub, given its stability and economic prosperity based on its control over the oil reserves. The triggering event is the independence of Kurdish Northern Iraq either unilaterally or through mutual agreement with the other parties in Iraq. This will eventually encourage the self determination Idea of the Greater Kurdistan in the peripheral Kurdish communities. However, the idea will continue to exist as “Soft Border”, economic, cultural and trade ties based on the common culture and nationality are strong among the Kurdish communities of the Near and Middle East. Whether the Kurdish autonomous region in Northern Iraq evolves into an independent state, or the peripheral communities maintain their autonomy and/or become mini-states depends on several factors that are analysed above.

3 THE SYRIAN KURDISH AWAKENING

The Syrian Kurds make up 9% of the total population⁹ and consider that the rebellion against the president of Bashar Assad could be a unique opportunity for the creation of an autonomous Kurdish region. However, the Syrian Kurds do not participate in the rebellion. In contrast, the local Kurdish parties have decided that the civil war in Syria must not reach to their region (Escobar (a), 2012). They kept an independent stance despite of the fact that the last fifty years the Syrian Kurdish populations had been oppressed by the authoritarian regime of Damascus (Dugulin, 2011)¹⁰. Meanwhile the Kurdish issue strained the relations between Turkey and Syria. Hafez al Assad (the father of Bashar) regime supported originally the PKK’s war against Turkey and its Kurdish fighters waged attacks from the Syria territory. Moreover, Hafez Assad had offered shelter for years to the leader of the PKK, Abdullah Ocalan, but a security agreement in 1998 between Damascus and Ankara forced PKK fighters to seek haven in Northern Iraq.

The Syrian Spring changed the status of the Kurdish minority as it has managed to distance itself from both the opposition rebels (the Syrian National Council (SNC)) and the regime of Damascus. The military forces of Assad have retreated from the Kurdish areas and they have been fighting against Sunni Arab rebels in Damascus and Aleppo. Thus the Kurds have full control of their territory.

Logically Kurds would wish to exploit the vacuum of power in Syria in order to promote their political and territorial rights. According to Joshua Landis, a Syria expert at the Center for Middle East Studies at Oklahoma University, “the Kurdish parts of Syria will undoubtedly become the focus of the power struggle that is

⁹ *In Syria Sunnis comprise 87% of the entire population, Shiites make up 13%, and Kurds only 9%. Syria International Religious Freedom Report 2006, US Department of State,*

¹⁰ *Syria’s Kurdistan has experienced discrimination through land expropriation, incarcerations and widespread intimidation at the hands of the government. Without the right to obtain any form of national identification or passport, the Kurds are de facto non-citizens in Al Assad’s Syria (Dugulin, 2011).*

emerging in the region over Syria. Sunni Arabs and Turks will line up against it. Shi'ite forces will be inclined to encourage Kurdish independence if only to hurt the Sunni Arabs even though this seems at odds with Baghdad's own distaste for Kurdish aspirations" (Markey, 2012).

Two major rival Kurdish parties exert influence on the policies of the minority. The Syrian Kurdish National Council (KNC), which was created in October 2011 and the Democratic Union Party (PYD) that controls Syrian towns along the Turkish borders, such as Kobani, Derik and Afrin. The two Kurdish political entities have agreed to put aside their differences and their strategies towards common aim, the protection of Kurdish territories and they managed to put aside their differences. The agreement was sponsored by Massud Barzani the leader of Iraqi Northern Kurdistan. According to Gonul Tol 2012 *"through the KNC, Barzani wants to expand his influence over Syrian Kurds. But after downgrading formal links to Syrian Kurdish parties in a gesture to Ankara, Barzani has only limited power over rural Kurds in Syria close to the Iraqi border. KNC's standing among Syria's Kurds is no better. It is a coalition group of more than a dozen organizations but they are small and divided with little influence, especially in the western part of the Syrian Kurdish enclave"*.

Nevertheless, the biggest and the best organized and armed party is the PYD which has the ability to mobilize large crowds of Syrian Kurdish crowds. The PYD was formed in 2003 by former fighters of the PKK and its ideology is based on the thinking of Abdullah Ocalan who believes that the purpose of the fight is only the "self-determination". (Tol, 2012).

The Syria Kurdish autonomy is considered a very controversial issue with internal and international effects. Except from the concerns of Turkey the prospect of a Syrian Kurdish autonomy provokes the concerns of the central Syria opposition, the Syria National Council (SNC) that includes mainly Arabs, such as the Muslim Brotherhood. A significant number of Syrian Kurds believes that the Arabs in SNC have hostile feelings for the Kurdish expectation for freedom even though its new leader is a Kurd (Markey,2012). In addition many Kurds fear that the domination of Islamist conservatives in Syria is not the best option for the protection of the rights of the Kurdish minority (Reese, 2012).

4 THE PROSPECTS OF A "GREATER KURDISTAN"

The developments in Syria are shifting dangerously the regional balance of power and the Syrian Kurds have emerged as a crucial player in the conflict. Some analysts argue that the Arab Spring is being transformed into the Kurdish Spring. The cataclysmic changes that derive from Syrian Crisis favour the prospect for the creation of a "Greater Kurdistan". According to O'Leary Brendan, McGarry and Khaled (2005) *"Greater Kurdistan encompassing most of this Kurdish population might form a nation-state of over twenty-five million persons. Its numbers would match an Iraq without Kurds. Combining elementary demographic calculations with*

elementary geographic analysis makes it obvious that two of the potential sites of lesser Kurdistans, those in “south-eastern Turkey” and “northeastern Iraq,” have contiguous and dense concentrations of Kurds near mountainous and forested environs favourable to the sustained conduct of guerrilla warfare, at least until recent changes in military technologies”.

According to a leading Turkish journalist Mehmet Ali Birand (2012) “Kurds cannot find a better opportunity. They may or may not succeed, but they will surely want to make use of this opportunity. Well, this is Turkey’s biggest fear: Kurds in Iraq and Syria acting together and gradually turning themselves into one unit. In the future they may annex other “sections” in Turkey and Iran and form a “greater Kurdistan”. Another Turkish analyst, Ertugrul Ozkok (2012) argues that “there is a strange situation both in Iraq and in Syria: Arabs are fighting each other; people are dying. The Kurds are taking one more step on their path to an independent state. Besides, they are able to achieve this without firing one bullet, without losing one soul”.

Ankara, of course, rejects the prospect of a “Greater Kurdistan”, since its south-eastern Kurd-populated regions will be part of the new Kurdish state. Nonetheless, despite the political and military resources committed by Turkey, a general uprising continues to be a strong possibility.

However probable the creation of a “Greater Kurdistan” may be it all depends on the outcome of the Syrian crisis. The “Balkanization” of Syria is considered a possible scenario that could also lead to a creation of a Kurdish state with territory of Turkey, Iran and Syria. In such a case, Syria will fragment into three separate states: one will be to northeast one, a Kurdish enclave; the other will be to the west coast, a mini-state for Alawites and the rest of the country will be controlled by the Sunni majority (Huges, 2012).

The breakup of Syria will undoubtedly affect the neighbouring countries, Turkey, Iran and Iraq, as well as Iran that has a considerable Kurdish minority. The Kurdish issue has been played by the regional states against each other on the race for domination. Now it is evolving into a destabilisation factor, to a boomerang for all those who used the matter to their opportunistic benefit. The existing post colonial artificial borders maybe will not survive when the Kurdish population of the Middle East seeks to establish the first Kurdish State after many years of oppression. An article in “The American Interest” points out that “*the Kurds have been disappointed many times before, but they will surely hope that this time will be different. The experience of self government in northern Iraq, where first the no-fly zone and then the weakness of central government in Iraq since 2003 have given Kurds their longest and most successful experience with power in modern times, has increased Kurdish capacity for political action and whetted the appetite of many Kurds for freedom*”. (Russel, 2012).

A “Greater Kurdistan”, a Free Kurdistan could rapidly transform the artificial borders of the Middle East as it will cover a geographical area from Diyarbakir (Turkey) through Tabriz (Iran) (Peters, 2006). In accordance to the principles of self-determination the establishment of a Kurdish state requires first a strong unity from the basic players of the Kurdish minorities and then an adequate coordination. So far this has not been the case. The various Kurdish fractions, such as the Turkish Worker Party of Kurdistan (PKK), the Syrian parties (i.e. the Kurdish National Council (KNC) and the Democratic Union Party (PYD)) should have put aside the different political and ideological background. The global Kurdish aspirations for self-determination create expectations for freedom among the Iranian Kurdish minority. Hence, the Kurdistan Democratic Party of Iran (KDPI) and Revolutionary Society of Iranian Kurdistan’s Toilers (Komala), have signed a strategic agreement as “the foundation of a big political union” in Iranian Kurdistan (Rudaw, 2012).

Our estimation is that the most vital and key role for the materialization of a Kurdish state could be played, perhaps only, by the leader of Iraqi Northern Kurdistan, Massud Barzani. According to Pepe Escobar (b, 2012), Barzani “*certainly sees a Greater Kurdistan independent from Arabs, Persians and Turks. But for that to happen in a grand scale he would have to conduct himself as a unifier - not only sharing power inside Iraqi Kurdistan but also managing conflicting Kurdish aspirations in Syria, Iran and Turkey. This implies a visionary streak plus tremendous diplomatic skills*”.

The creation of the Kurdish State affects the regional balance of power in the greater area. Without disregarding the role of the Saudi Arabia in the formation of politics in the Near and Middle East, I will analyse only the position of Israel, a powerful ally of the United States in the region. For Israel, the creation of a Kurdish state could constitute a kind of buffer state against Islamist threat, as Kurds are considered to have solid national identity and be moderate Muslims compared to the Sunni and Shiites of the greater Middle East. Moreover Israel could exploit Kurdish issue as diplomatic leverage to influence Turkey to adopt friendlier stance to Israel. In the past when Turkey and Israel had close relations Tel Aviv refrained from showing much support for Kurds. Nowadays the relations between Turkey and Israel have dramatically deteriorated and Ankara turned into a strong criticiser of Israeli policy on Palestine; moreover it implements the neo-Ottoman policy of its Foreign Affairs Minister, Dr Ahmet Davutoglu¹¹. Hence, Israel, conversely to its previous position on the matter, is currently reconsidering the geostrategic importance of Kurds as potential leverage to be used against its neighbours; in the same way as it has been used so far by Iran and Syria against Iraq (David McDowall, 2004). According to Dr. Sherkof Abbas, President of The Kurdistan National Assembly of Syria “*A Kurdish state in the North will block the spread of Sunni Islam, encouraged by such countries as Qatar, Saudi Arabia and the UAE. It will also weaken Iran and its proxy, Hezbollah, and will put*

¹¹ Davutoğlu Ahmet, *Stratejik Derinlik, Türkiye'nin Uluslararası Konumu (The Strategic Depth)* (İstanbul, Küre, 2005) <See also Greek Translation, *Άχμετ Νταβούτογλου, Το στρατηγικό βάθος (to stratigiko vathos), translation, Nikolaos Raptopoulos, Neoklis Sarris (ed) (Πιούιτητα (Piotita) publishers 2010)>. See also, Alexander Murinson, “The Strategic Depth Doctrine of Turkish Foreign Policy”, *Middle Eastern Studies, Vol. 42, no. 6 (2006), pp. 945-64*,*

an end to Turkish, neo- Ottoman ambitions” (Blade, 2012). Kurds could establish close relations with Israel even through some parts of Kurdish people might have mixed feelings towards Israel (Blade, 2012). According to Natham Guttman (2012) “the long-term relationship between Israel and the Kurds is one based on mutual interests and often unspoken understandings. For Israel, Kurdistan was an island of non-Arab friendship and a possible bridgehead to the Gulf. For the Kurds, Israel offered an alliance and a path to the West while struggling for self-determination in Iraq, Iran, Turkey and Syria. Former Kurdish leader Mustafa Barzani, Masoud Barzani’s father, was considered a friend to Israeli military and defence officials” (Guttmman, 2012). So the Kurds are given the opportunity to exploit this recent Israeli policy in their favour and work as bridge for the control of Iran. In this context, the Kurds could consider other potential alliances; perhaps with the Iranian Azerbaijanis in order to weaken a common front of Arab Shiites, Sunnis and Turks.

However Kurdish expectations for the creation of a “Greater Kurdistan” could mitigate with a semi- autonomous status in the Kurdish regions of Turkey, Syria and Iran. According to professor Ofra Bengio at the Moshe Dayan Center for Middle Eastern and African Studies only the Kurdish Northern Iraq is likely to achieve independence as it has clear- cut borders and Arabs need to obtain special permit to cross the border. Nevertheless Kurdish population of Syria, Turkey and Iraq have bolstered their ties increasing their trans-border activity (Blade, 2012).

5 KURDISH NATIONALISM

Kurds have developed strong nationalism. The socio-economic and political changes on the Kurdish population in 1950’s (e.g mechanization of agriculture, industrialization, consequent revolts, rural-urban migration, emigration, political mobilization the expansion of public education and mass communication) weakened the tribalism of the Kurdish society and provided an impetus for developing larger Kurdish nationalism (Meho, 1997). For example in Turkey more than 35 percent of the total Kurdish population lives in Istanbul, Ankara, Izmir and other major Turkish cities, let alone the Kurds who moved into major Kurdish cities like Diyarbakir, Antep, Malatya, and Urfa. Many of these migrants left Kurdistan either voluntarily or forcibly. There are also about 400,000 Kurdish immigrant workers in Germany alone, not to mention other European countries. According to Meho (2012) “*Kurdish emigrants in Turkey become more socially and politically conscious, and their awareness of their Kurdish identity and ethnic solidarity is strengthened. As for the Kurdish immigrants in Europe and elsewhere, many were able to form their own associations, without harassment from the state. The children of these Kurds attend schools and achieve greater political awareness and self-confidence Such improvements in the social, economic, and political status of the Kurds has become a vital source for the development of Kurdish nationalism in Turkey*”.

The deprivation of political and cultural rights of Kurdish minorities by the Kemalist ideology, the violent suppression of Kurdish uprisings and the social and economic

marginalisation of Kurdish populations by the governments of Turkey, Syria, Iraq, Iran, has significantly strengthened Kurdish nationalism. In addition Kurds cannot easily trust promises from the Turks and Arabs because they increasingly feel that have been betrayed of them. The founder of the modern Turkish state Kemal Atatürk abandoned his ideas to preserve Islam and the Caliphate, and instead energetically launched a westernising political programme. This development according to Oliver Roy (2005) “gave rise among Kurds to a sense that their contract with the Turks - hitherto justified by the brotherhood of all Muslim peoples - had come to an end. Moreover, the promises of Turkish-Kurdish brotherhood during the War of Independence (1919-1923) gave way to an exclusive Turkish nationalism. The post independence Republic did not recognise any identity other than Turkish. Either it simply denied the existence of the Kurds, or it saw ‘Kurdishness’ as ‘feudal’ and ‘reactionary and the Kurds as an ‘oppressive’ ethnic group and class, the historical mission of which was, in its view, to exploit and destroy progressive and revolutionary ‘Turkishness’”.

And this has been the oxymoron of the Turkish policy: On the one hand, Turkish nationalists allied with the Kurds to eliminate the Christian self-determination efforts during the war of independence; on the other, they abandoned this policy, by replacing religion with Turkishness as the cohesion factor of the new state. This shift encouraged Kurdish nationalism turning it more powerful than religion, which could be considered as connection factor among Kurds and Turks, Arabs. At least two thirds of the Kurds are Sunni Muslims, in contrast to their Arab and Turkish Sunni neighbors who adhere mostly to the Hanafi School, and from their Azeri and Persian neighbors who are Shiites.¹²

The young Kurdish populations are characterised also by a growing Kurdish nationalism. The young Kurds of the impoverished south-eastern regions of Turkey (because of the political, social negligence and violent suppression from security authorities) have developed a more radicalised nationalism. The fight of PKK against Turkish military has solidified the aspirations of the young Kurds for the secession of Turkey and expectations for the materialisation of a “Grater Kurdistan”. In addition the children of Kurds of Diaspora in Europe and elsewhere attend schools and achieved greater political awareness and self-confidence. A vital role to the preservation of Kurdish nationalism plays the Newroz celebration, taking place on March 21, is New Year according to the Kurdish Calendar and it plays. In the eyes of the people of Kurdistan, Newroz means a lot more than a simple celebration of a New Year. Newroz signifies unity and brotherhood for national liberation, emancipation and empowerment of the oppressed. It is of greater importance because it has become an annual event registered in every Kurd’s memory to further their salvation and independence in a political sense. Newroz point out Ahmad (2012) “provides this identity

¹² There are, however, many Shi’i Kurds who constitute 10 to 15 percent of the total Kurdish population, i.e., 3 to 4 million concentrated in southern Kurdistan (Iran) and in the districts of Khanaqin and Mandali in Iraq. 15 Most of the remaining Kurds are adherents of heterodox, syncretistic sects “with beliefs and rituals that are clearly influenced by Islam but owe more to other religions, notably old Iranian religion.” 16 Such sects include the Alevis (or the Qizilbash), the Ahl-e Haqq (‘People of Truth’) and the Yezidis, in that order. There are also a few thousands of Christian Kurds and 100,000 Jewish Kurds residing both in and outside Kurdistan (Meho, 1997).

for modern Kurds as a result of the status quo of being Kurdish in the modern Middle East. It defines emancipation and liberation due to the long fought for cause of Kurdish independence which, in effect, amongst other things, has politicized to the core many aspects of the Kurdish way of life, including this traditional New Year”.

Conclusions The balance of power in the Middle East has been shaped by the interventions of great powers, more recently by the USA that invaded Iraq in 2003 and created a New Middle East Order with the creation of semi – autonomous Iraqi Northern Kurdistan. The secular, and at the same time, authoritarian regimes (who did not respect for decades the fundamental human rights) collapsed after the storming consequences of the Arab Spring. The desire for freedom is the critical factor that could lead the Kurdish minorities to achieve the creation of a “Greater Kurdistan”.

The national feelings of the Kurdish population have increased and it is believed that they are really ready for the establishment of a separate nation. The status of Iraqi Northern Kurdistan and the Syrian Crisis strengthens these aspirations for freedom. Northern Kurdistan constitutes a successful model and it has an ability to govern its regions. The income from the oil recourses allows Kurdish Regional Government (KRG) to dedicate necessary funds for the development of its area. Moreover, the occasion of the Syrian crisis encouraged the Syrian Kurdish minority to form a common front and it took control of its areas. The rebellion of Sunni population against the regime of Damascus put Syrian Kurds to the forefront of the regional policies.

Thus regional turmoil complicates the decision – makers of Turkey, Iran and Iraq as the Kurdish issue becomes now more complex and more dangerous than ever before. A “Greater Kurdistan may also include the territories of Kurdish minority of Turkey and Iran. Thus the Kurdish issue could define the fate of the regional politics in Turkey and Iran. The two regional powers cannot use the Kurdish issue against each other and it is extremely difficult to follow a common line. On the one had Turkey is most notorious critic of the Syrian president Bashar Assad, while it maintains a sunni profile (that is on many occasions sponsored by Saudi funds). , On the other hand Shiite Iran is a peripheral protector of the Shia muslims, culturally close with Alevis and Ismailis, and an ally of the regime of Damascus, maintaining strong influence to Lebanon and south Iraq.

Finally the creation of a “Greater Kurdistan” could be materialized under the following five preconditions: (a) when Kurdish nationalism meets the levels that gives Kurdish population more self-confidence to implemented the plan of the “Greater Kurdistan” (b) the unification of all Kurds under a common leadership who could meet the expectations of Kurdish population for a independent Kurdish state, (c) The independence of Kurdish Northern Iraq as the first and main hub for the unified Kurdish State, (d) the exploitation of the Syrian Crisis of Syrian Kurds to create an autonomo- us sustainable enclave that could be unified with other Kurdish regions of Northern Iraq, southeast Turkish provinces and Iranian Kurdish regions, (e) the support of the

United States that is considered a crucial factor. Washington would encourage the creation of an independent Kurdish State if it sees that Turkey is starting to maintain close relationship with conservatives Sunnis Islamists (Salafistes) of the Middle East threatening the American national interests.

However the stance of the USA is not yet clear towards Kurdish aspirations for autonomy. The Iraqi Kurds has been a close ally of the Americans during the war against Saddam Hussein and Washington supported the Kurdish claims for a “semi-autonomous” status inside Iraq. The USA wants to avoid another trap in the Middle East after the bloody adventure in Iraq and the White House has shifted the American strategy to Asia and the Pacific. Thus the efforts of Kurdish minorities for an independent state directly depend on the rapid geopolitical developments and the Kurdish determination to maintain a common front.

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POLJSKA SODOBNIM IZZIVOM RAZVOJA IN VARNOSTI NAPROTI

POLAND TOWARDS THE CONTEMPORARY CHALLENGES OF DEVELOPMENT AND SECURITY

Povzetek Varnost in razvoj Republike Poljske opredeljujejo sodobni izzivi ter grožnje interne in eksterne narave, ki jih je treba obravnavati celovito. Med glavne izzive in grožnje spadajo mednarodni terorizem, širjenje orožja za množično uničevanje, pomanjkanje surovin in energentov, problematika naraščajočih migracij, možnost nestabilnosti v mednarodnem okolju, razvoj organiziranega kriminala, nazadovanje mednarodnega statusa države, povezanega s trenutnimi reformami mednarodnih organizacij, na primer Nata in EU, ter nujnost vključevanja v razreševanje regionalnih konfliktov, tudi zunaj Evrope. V luči teh dejavnikov se kaže potreba po integriranem državnem varnostnem sistemu, ki bo temeljil tako na strokovnem znanju in sodobnih strukturah kot na potrebi po zreli varnostni kulturi.

Ključne besede *Poljska, varnost, nacionalna varnost, mednarodna varnost, mednarodni odnosi, razvoj, izzivi, grožnje.*

Abstract The security and development of the Republic of Poland are defined by modern challenges and threats which are of both internal and external nature, and which should be treated in a complex way. The main ones include the following: international terrorism, proliferation of weapons of mass destruction, scarcity of raw materials and energy supplies, issues related to growing migration, possible instability in the international surroundings, development of organised crime, deterioration of the international status of the State connected with on-going reforms of international organisations (like NATO and the EU) as well as the necessity of engagement in solving regional conflicts, also outside of Europe. In the light of these considerations, there is a need for an integrated state security system based on professional know-how and modern structures, as well as the need for a mature culture of security.

Key words *Poland, security, national security, international security, international relations, development, challenges, threats.*

Introduction

The perception of safety to a large extent determines the prospects of state development. As a vital value, it has a controlling influence on the minimum fulfillment of other needs, remaining the existential interest. Safety, which is the supreme need for a single person and human communities, permanently constitutes a complex and difficult problem. Its scope is to evolve and follow the development of the emerging new trends. New threats are determined by the development of civilization – both the scientific and technological change and changes in individual and social consciousness. So, the number of isolated areas of security is growing and the interrelation between its different components and its dimensions can be perceived. Having in mind the multidimensionality of security, the following should be remembered: the broad scope of subjective and spatial aspects, interdisciplinary researches on it, the interdepartmental cooperation in the matter of practical tasks of the state, the relationship between the subjective aspects, as well as its dynamic dimension.

1 THE MODERN MEANING OF SECURITY

The modern meaning of security assumes its broad treatment, well beyond military matters (Stańczyk, 1996; Buzan, 1991: 19-20). Based on the criteria, the subjective spectrum of security covers the following issues: military, political, economic, ecological, social, cultural, information technology and others. It is implemented in the interwoven dimensions: individual, national (state) and international levels. It takes the local, sub-regional, regional, cross-regional and universal range. The subjective, objective and spatial limits of security tend to expand. The security is, both, a state and a process. It happens that the protection is individual and collective with the use of subordinate and coordinate methods.

Such a broad definition of security can be treated as a result of an equally broad vision of its threats which have also varied in dimension and nature. Considering the subjective aspect, the following threats can be perceived: military and non-military, political, economic, ecological, social, psychological, cultural and civilizational and others (Dworecki, 1994, 1996). They can be internal or external, as well as direct or indirect (Kubiak, 2000, p. 88-95). The phenomenon of modern times is that even in such a diverse typology it is difficult to recognize all of the challenges and threats to the security and clearly qualify them to appropriate groups. It results from the fact that many of the challenges and threats to security have currently both intrastate and external characters. Moreover, transnational and cross-border risks were spread after “Cold War” and their source could be often identified as non-state actors (Baylis, Smith, 2001). The modern concept of security does not imply that it is only the opposite of those risks. Its meaning joins the physical survival and ensuring the freedom of development.

The strategic goals of the security policy of modern states are not only to protect the independence, sovereignty, territorial integrity and inviolability of borders. The danger of the conquest of a country by an external force has lowered lately because any aggressive goals can be achieved without use of military means: “The goal of

attack on a state is no longer its territory, but its structure, its social status, operating institutions and the welfare of its citizens.” (Donnelly, 2000-2001, 32) Reason of state remains the security protection by protecting the rights of citizens and freedoms within a particular legal order. The aim of the broadly understood security policy is also creating conditions for a comprehensive, stable socio-economic development and increasing prosperity for citizens (Stańczyk, 2011c, 5-14). The preservation of national heritage and the protection of national identity are significant as well.

Nowadays, in the conditions of deepening and expanding more and more interdependence, what is to be the national security and the sense of its existence is the ability to provide the people with appropriate conditions of existence and the development of identity among other participants in international relations. The national security is the value which enables us to understand as good as possible the meaning of the reason-of-state concept, the idea of statehood and its vital importance in the international community (Stańczyk, 2003, 87-116). The state has an obligation to defend the security of the territory and the population which lives on it, but when the state is not able to fulfill these basic functions and obligations to the nation, it may lose its attractiveness.

It is important to perceive that the state is not only the territory, population and authorities. It has a kind of intangible assets such as culture and social attitudes. It is the spiritual achievement of civilization which creates the nation's wealth but also requires protection. It cannot be forgotten when we think of the state and security. That is why the legal acts and armed forces are not the only guarantee of the national security. It should be built every day in the minds of its citizens through the responsible participation in the creation of the common good which grows over partisan differences and individual interests.

Tasks in the sphere of security policy defined in this way mean treating the policy in a comprehensive manner, taking into regard the importance and impact of various factors: political, military, economic, social, environmental, and others. In addition, the implementation of national security policies more and more requires the respect for international law and its commitments, and for the principles of conduct which are found as the result of the work of many international institutions. At the same time the universalization of values such as freedom and democracy seem to receive special importance. The value system is a more important factor than the geographical location of countries (Stańczyk, 2002a, 171-188). Modern technologies of communication in the era of information revolution define the hierarchy of states and their level of security more than the traditional determinants of economic power such as population, resources and the gross national product (Nye, Owens, 1996: 20). New indicators of the economic strength based nowadays on the consumption attractiveness increase the possible influence on the international stability (Stańczyk, 2010b). The security and development of civilizations have become mutually interdependent under the conditions of interdependence of countries in the globalizing economy and the internalization of the entire cross-section society.

2 CONTEMPORARY CHALLENGES AND THREATS

It should be noted that the nature of challenges and threats to security has so far significantly changed. The world of Cold War was characterized by a high level of stability and a high level of military threat. We currently have a low level of military threat and a low stability in international relations (Rotfeld, Symonides, 2000: 13). The threat of war in Europe gave way to the following main challenges for the security of states: 1) international terrorism, 2) proliferation of weapons of mass destruction, 3) energy shortages and even energy blackmail, 4) regional and local conflicts, 5) internal destabilization and even state collapse, 6) development of organized crime, 7) increased xenophobia and social unrest on national, religious and cultural backgrounds (2003. *A Secure Europe...*; Everts, 2004).

The abovementioned challenges do not close the possible list that could be put in this directory. Broadly speaking, other items should be added: political, military, economic, social, ecological, natural, risk of supply failure, cultural, informational. Their essential feature can be described as interpenetration. They have many aspects and in most cases even non-military (in the classical meaning of armed conflict). They are related to the internal political stability, as well as social and economic stability, affecting the contemporary international stability (Žukrowska, Grącik, 2006; Stańczyk, 2008, p. 130-150). Thus, they require a response from the scope of the so-called soft security. According to the European Security Strategy adopted in 2003, great emphasis is put on risk prevention (December 12, 2003. *Europe Security Strategy*). The feature of modernity is the impact on the sources of these conflicts without the use of military means and with the use of the means like: political, economic, legal, police, intelligence, emergency response etc. Besides, they require more international than individual efforts and an integrated approach coordinated by international bodies (Buzan, 2000).

It is difficult to make their detailed analysis in this brief study. That is the reason why the most important of them will be presented in a summarized form.

International terrorism has become one of the strategic threats for many countries, including Poland. It has a global dimension today (Stańczyk, 2002b, p. 111-132). It happens that it is only a means of expressing opposition to imbalances resulting from the globalization process, culture and values of the Western world or the domination of powers in the world order. In conjunction with religious extremism and resorting to the new methods and means of killing (weaponry is not necessary, as it was demonstrated in the WTC attack in 2001) became the main cause of the so-called asymmetric threats. It poses a particular challenge that requires multilateral action involving international institutions, with operations in many areas, yet integrated. It is the escalating threat.

According to the assurances of the Polish authorities responsible for combating terrorism, we cannot perceive the real threat of terrorist attack in Poland now (*Reports*. 2007). Anyway, we cannot forget that Poland is actively involved in anti-terrorist coalition and Polish soldiers are present in Afghanistan (previously in Iraq). Therefore,

we should be aware of the fact that Poland and its citizens are not free from danger flowing from global terrorism. International events such as terrorist attacks in Madrid and London did not increase the risk in Poland. However, the situation may change when Poland becomes an attractive country for terrorist groups. The EURO 2012 in Poland was undoubtedly an event which would encourage the groups. The international nature of the championship, massive media coverage and large groups of people, both football players and fans could have been an incentive for terrorist organizations always seeking after as much attention as possible. The 2012 UEFA European Football Championship clearly showed that the preparation time had not been devoted only to build football stadiums, but also to ensure the safety for all participants of that meeting.

The threat of proliferation of weapons of mass destruction (known since the end of “Cold War”) today gains additional importance in connection with the development of international terrorism (Stańczyk, 2004, p. 73-82; Stańczyk, 2005b, p. 204-215). The components of weapons of mass destruction have become broadly available today and so has the necessary technological knowledge. This applies not only to nuclear weapons, but also to various forms of biological and chemical weapons, such as the use of biotechnology and nanotechnology. The transportation and smuggling of these weapons have become easier owing to their miniaturization. In relation to the instability occurring in many parts of the world (also in the European neighborhood – the Middle East), the proliferation takes the form of a new “arms race”.

The state should pay particular attention to the stability in its immediate vicinity. Regional and local conflicts are no longer a factor that can directly or indirectly threaten the security of Poland (Stańczyk, 2005a, p. 25-56). However, we have to deal with the manifestations of political instability beyond the eastern border. They can potentially promote the development of xenophobia and extremism; organize crime, illicit arms trafficking, uncontrolled migration and proliferation of weapons of mass destruction. The need is without doubt to strengthen the democracy in Polish environment. The democracy helps us make collective efforts for security, including the prevention of potential crises.

Preventive measures are not new to the prevention of the development of terrorism, proliferation and regional conflicts. The influence of globalization on the perception of challenges and risks, however, is a new phenomenon. It motivates to analyze and counter the threats not coming from the close neighborhood, such as the proliferation of weapons of mass destruction in the Middle East or even the nuclear threat from North Korea (Simpson, 2003). In this context, Poland faced the problem of response to the U.S. proposal to install the components of missile defense system on its territory. It could affect Poland’s international relations, especially the relations with the Russian Federation.

The important fact is that the security is getting a broad economic dimension today. The economy, however, increasingly affects the safety issues of states in the globalizing world. It should be referred to the economic potential of the state, its financial

stability and the quantity and quality of resources spent on the defense. The stability and predictability of the economic environment of neighboring countries and major trading and financial partners play meaningful roles as well. Hence, it is important to support the economic transformation processes going towards the liberalization of economy and democratic political changes (Stańczyk, 2011b, p. 42-50). It is also important to maintain the stability and transparency of international financial relations.

The provision of energy security is another meaningful element of the economic security. The growing Polish energy deficit manifested by its decreasing rate of self-sufficiency is perceived as a problem. It requires the diversification and protection of main imported energy sources – oil and natural gas. This is the reason why long-term energy supplies and their new sources among different countries are needed. At the same time, it is necessary to provide technical conditions for the storage of energy – the creation of strategic reserve. The dependence on raw materials and energy supplies from Russia can threaten, in conditions of instability in the world, the economic and political security as well. The raw material and energy shortages influence the economic security, but they can also initiate political blackmail.

The social security problems resulting from the high rate of unemployment, an aging population and the high immigration in recent years are important as well. These processes affect the underestimated sphere of demographic security which can be manifested in yet unknown economic and social problems, including threats to cultural identity (Kuźniar, 2006, p. 8).

The development of organized crime is one of the major security threats to modern states. It applies both to the cross-border perspective of this phenomenon, the regional spread of the organized crime from places characterized by the absence of the rule of law as well as a kind of import of the criminal activity (drug/human/arms trafficking, illegal transfer of immigrants) (Stańczyk, 2001, p. 79-83). Thus, we are dealing here with a specific interpretation on internal and external spheres of its influence, relations with terrorism, weakening of state structures and the induction of social and even international conflicts.

Corruption, organized crime and terrorism have become new security threats today, more difficult to define than the military. This is the reason why it is harder to counter them. The fight against these threats is not easy especially in democratic countries. Sometimes it can happen that the methods and means deployed to counter the new threats may produce effects far more detrimental to the security – among others – in the dimension of respect for human rights and freedoms.

The increase in xenophobia and social unrest because of national, religious and cultural differences is another challenge to the security of modern states different from the military threats of the period of “Cold War”, but able to cause international unrest. They may also involve the close environment of Europe in the regions

of Caucasus and the Middle East from where the risks related to the previously mentioned challenges without use of military means can spread. Because of these facts the intercultural dialogue is needed, including the dialogue with the Muslim world. In this context, the Polish involvement to find the solution in the conflicts on the Middle East or in Afghanistan is important. It is not decided that a consensus on the issue of the Polish military involvement in high-risk missions can be reached in the future.

No less important need is the need to strengthen the unity around its own values. This is the reason why the need to preserve the transatlantic link, which connects Europe with North America within NATO, is perceived as essential in Poland (Staćzyk, 2011a, p. 71-84). The issue is very important, because the support for the North Atlantic Alliance given by the Polish society is currently in decline (since 2006, the support has dropped to 47% and it is the lowest in Europe) (“Transatlantic Trends”). The unity and identity make a bond necessary to build the European security in conditions of freedom and diversity.

Taking into regard the prospect of European security, the role and transformation of European institutions should be mentioned where the leading roles are played by the transatlantic political and defense organization – the NATO and the process of EU integration. The challenge for Poland is not only to meet the requirements of participation in these organizations, but also the determination of the Polish position on the issues of necessary reforms (Koziej, *Sojusznicze wyzwania...*).

The role of information security is increasing in the era of information revolution. The efficiency and security of communication systems and information processing play an increasingly important role in the operating structures of the state and society. However, the information security cannot be misused to justify the state control of information flow. In the sphere of international security globalization manifests itself in – among others – growing interdependence, the growing importance of information technology and mass media. The better time for reaction to the ongoing events is caused by it. The participants of international relations can use the increasing interdependence of contemporary states and international institutions (including the defensive alliances) on the operation of information systems and in extreme cases they can take actions aimed at the destruction of the systems to balance the advantages of traditional weaponry. These are the new security challenges, requiring unconventional action.

Counteraction to the political manipulation of security threats becomes no less important (Staćzyk, 2010a, p. 437-444). “They can be real, but may illustrate how the political manipulation, exaggeration or misunderstanding reduces the ability to overcome them.” (Donnelly, 2000-2001, p. 34) It influences directly the activity of secret services. Gathering and evaluation of the information on the development of international political and economic relations are parts of the security policy of modern states. Secret services carry out projects related to counterintelligence

protection in the area of responsibility for the operation of the strategic elements of the economic and defense infrastructure. Besides, the secret services acting in the state structure along with the police and other agencies take part in the fight against threats to the security of the state and its citizens (cross-border threats – among others – are included).

3 THE NEED FOR AN INTEGRATED SYSTEM OF NATIONAL SECURITY

Due to the changes in the nature of contemporary challenges and threats, it has become clear that not only the army and defense are responsible for the national security. They are only components of the national security system. The important feature of the contemporary strategic thinking about security is the perception of its non-military factors and early prevention before the crisis can be developed (internal or international). (Crocker, Hampson, Aall, 2001) For this reason, we perceive the need in Poland for the strategic review of national security, in the broader scope than the strategic defense review (*General information...*). We should take into account that only 20% of the dangers faced today by countries can be described as a threat of war connected to the violation of territory by other countries (the other is an internal threat). The change of many existing views on the matters of defense and crisis management is needed.

When analyzing the spectrum and the specific set of challenges, it can be said that the national authorities carrying out tasks in the area of national security require reforms, so that their action could include all threats and security challenges. Many of these threats and challenges go beyond the traditional perception of safety. The Ministry of Defense and Ministry of the Interior do not fully recognize it. They work for defense and public security but this does not fully fulfill the today's understanding of national security. It can be already seen in various crisis situations.

The effective crisis management system cannot be an occasional instrument, but has to be integrated with the current system of state management. The total coordination of responsibilities and activities of all components: central institutions, units of territorial division of the country and the local government have to exist in the system. So, it is necessary for the armed forces to cooperate with the civil sphere of the state.

Eventually, the integrated national security, including civil protection and crisis management system, should be created. It would implement the close cooperation between the state authorities and the entire public and private sphere. The cooperation with the business sector would have an important role to play in it. It means that especially so called critical infrastructure in the country should be concerned (for example communication, IT). (2006. „Computerworld”...) In the effective security system, reactive to contemporary challenges, the common and active participation becomes the necessity, not only for all of the authorities, but also for other public institutions, businesses, community groups and citizens. It requires a mature culture of

security supported by education, aware participation in the life of a country and the ability to learn how to deal with crisis situations.

The security is a quite problematic area within the operation of the state structures. It is dealt with by specialized departments— mainly three of them: internal affairs, foreign affairs and defense. None of these departments is able to cope with the security challenges alone because of the broad subjective scope of security. This is the reason why tasks regarding the security challenges are executed at the interface between these departments. The qualitative change in challenges and threats to modern safety (such as – among others – terrorist threats) causes the insufficiency of this approach. Although it is highly specialized, it remains confined to departmental activities: diplomacy, military, police, intelligence and counterintelligence, border guards, rescue units, etc. Nowadays, integrated activities are needed, coordinated by a professional management system for these services at the national level (the website of the National Security Bureau in Poland...). It would ensure a coordinated use of all forces and means at the disposal of state to counter threats to the national security.

The need for comprehensive answering problems of national security can be seen, including the creation of the new integrated civil–military structure. Only such a structure can provide the coordination of activities which have to be taken by many ministries and departments to counter today’s multi–dimensional threats. Conceptual, planning, coordination and control activities would be implemented within its framework. The Security would be treated comprehensively in all of its aspects: external and internal, civil and military and – at the same time – in the states of the peace, crisis and war (Koziej, *Bezpieczeństwo ponad resortami...*).

It requires the creation of appropriate organizational and staff structures subordinate to the executive branch (the president and government) which in exceptional cases concerning national security would play an overriding role in comparison to specialized departmental structures. In spite of the undertaken reforms, it should be remembered that enough space is needed to create specialized analytical and strategic centers able to interpret the results of interdisciplinary analytical work of various state departments and to verify them through academic advising.

The dynamics of contemporary development in international relations motivates us to monitor the situation constantly, to update the diagnoses regularly, and to make attempts to react comprehensively and in advance. For this reason, governments are expected to maintain professional think tanks and to develop strategies to protect safety. This is a major challenge facing Poland and we believe that the challenge should be assigned a higher rank (the website of the Polish Institute of International Affairs). The successful implementation of national security policy based on the work of think tanks, decisions of authorities, the means and mechanisms necessary for their launch will always depend on the professional preparation of the specific knowledge, experience, skills in the decision–making process and imagination. It

requires a new approach to security issues, the education of specialists, the popularization of the presented issues and making a bold exchange of views. The implementation of national interests depends on it.

Conclusions It is difficult to make a far-reaching assessment of the prospects of Polish national security because of the variability of the factors determining them. For this reason, current policies and security measures are not fully able to efficiently counteract unexpected challenges and threats. However, today we know that they are diverse and largely non-military. For this reason, responding to them requires much more non-military means than in the past. In addition, the distinction between external and internal threats and challenges to security blurs which causes – among others – the closer cooperation between political and military institutions and even taking over some of their functions by the collaboration of internal security services. The role of multilateral internal and external cooperation becomes increasingly important in such complicated conditions.

Polish security is still under the influence of the ongoing process of change of international alignment of forces in Europe and worldwide. It faces the challenges of further institutional change in Europe, the necessity of healing of transatlantic relations, stimulating the development of sub-regional and cross-border cooperation, protection of the freedom of the exchange of raw materials and energy and the fight against international terrorism. It is subject to the laws of development of international relations such as increasing interdependence and internalization. It remains no less dependent on internal factors related primarily to the directions of structural reforms but also to coalitions on the political scene. The challenges related to the national security are referred to the level of social awareness and consequently they should be a problem of our unity and identity.

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VLOGA FINANČNIH VIROV PRI UVELJAVLJANJU SODOBNE VARNOSTNE PARADIGME NA OBRAMBNEM PODROČJU V IZBRANIH DRŽAVAH

THE ROLE OF FINANCIAL RESOURCES IN ESTABLISHING CONTEMPORARY SECURITY PARADIGM IN DEFENCE AREA FOR THE SELECTED COUNTRIES

Povzetek Večplastno varnostno okolje in izzivi sodobnega sveta, s katerimi se vsak dan srečujemo, predstavljajo rdečo nit članka, v katerem trdim, da se mora obrambni sistem kot del nacionalnovarnostnega sistema sodobne družbe nenehno prilagajati izzivom okolja, v katerem deluje. Le njegovo nenehno prilagajanje mu namreč omogoča, da se učinkovito odzove na izzive, ki jih prinašajo s seboj procesi globalizacije, tudi na področju varnosti. Izziv predstavlja področje organiziranosti obrambnih sistemov in finančnih virov, ki zagotavljajo njihovo delovanje po posameznih državah. Omenjeno področje je namreč v državah različno urejeno oziroma so se države večinoma različno lotile organiziranja oziroma prilagajanja sistema na izzive sodobnega okolja. Uspešnost njihovega prilagajanja bo merljiva šele čez čas. Strateški in usmerjevalni dokumenti določajo tudi preoblikovanje obrambnega sistema Slovenije, zato je smiselno upoštevati tudi primere dobre prakse in pristope, ki so jih uporabile izbrane države. Le s pravočasnim in celovito izvedenim preoblikovanjem obrambnega sistema se bo zagotovila še učinkovitejša podpora obrambnemu sistemu in v nujnem obsegu tudi sistemu varstva pred naravnimi in drugimi nesrečami.

Ključne besede *Sodobno varnostno okolje, globalizirana varnost, bruto družbeni proizvod, finančni viri, obrambni sistem, preoblikovanje obrambnih zmogljivosti.*

Abstract This paper examines a complex security environment and every-day challenges of the modern world. According to the author, the national defence system, as part of the national security system in a modern society, should constantly adapt to challenges of the environment in which it operates. Only in this way, it is possible for the defence system to effectively respond to the challenges of globalization processes, including those pertaining to security. The challenge exists in the organisation of defence systems and financial resources providing their functioning in individual countries. In this respect, countries are organized differently or have started

to introduce the organizing or adapting of the system to the challenges of the modern environment in a different way. The success of their adaptation will only become measurable over time. Since Slovenian strategic and guidance documents lay down the transformation of the Slovenian defence system, it is reasonable to consider the examples of good practice and follow the approaches used by selected countries. Only timely and comprehensive transformation of the defence system will provide a more efficient support to the defence system and to the system of protection against natural and other disasters, to the necessary extent.

Key words *Contemporary security environment, globalised security, gross domestic product, financial resources, defence system, transformation of defence capabilities.*

Introduction People perceive and understand threats in different ways, depending on where and in what conditions they work. Thus, the international as well as the national security environments of the 21st century are faced with various sources of threat and risks to security that, from a geographical point of view, occur at global, transnational and national levels (The Resolution on the National Security Strategy of the Republic of Slovenia, 2010). They are complex, correlated or independent, synergistic and interoperable by nature. Furthermore, they are often very hard to predict and have a multiplier effect and character. They are usually posed by non-state entities. Such perception of the contemporary security environment and, consequently, the understanding of security have been affected by a number of processes which have brought about many important shifts, triggered numerous processes and fundamentally rearranged the political and security appearance of Europe in terms of international relations, both at regional and global levels (Stelle, 2002).

Globalisation, universalisation and information revolution, and the subsequent high level of interdependence, have also contributed to the changing security risks and threats. These processes bring all the risks or increase their influence on security level and, consequently, on the price required by the security. Hence, the more far-reaching the effects and consequences of the globalisation processes, the greater the diversity and impact of contemporary security risks and threats on the security of different references. On this basis, it could be concluded that globalization and security are mutually dependent and directly proportional. In other words, the higher the risk and the greater the threat, the higher the price of security. As a consequence, security is increasingly globalised not only in financial but also in geo-strategic terms, and is thus becoming globalised security.

Perception and understanding of security in modern society is affected by modified sources of threat which move the understanding and study of security away from the traditional forms, focusing on state or national security, towards modern forms of study that are mostly related to the security of the individual and the international community. In the past, security environment had military and political dimensions. Today, however, the wider social, cultural and civilization dimensions are stepping into the forefront (Grizold 2005, p.7).

All this diversity of processes and related impacts, including security risks posed by rapid changes in the society, on the one hand, and new opportunities and challenges, on the other, have triggered a number of unstoppable processes within the existing national security systems which are, under a new, contemporary security paradigm, changing the role of the government in providing security to its citizens and residents. Security efforts belong to the category of culture and civilization, which covers all aspects of security, including economic, social, political, legal and defence aspects. It could be argued that the concept of security covers social values at the regional, national, international and global levels (Anžič, 1997, p.35).

The modern security paradigm deals with three basic conceptual frameworks of security: individual, national and international. When the security needs felt by an individual are met and satisfied, this allows for the quality development, existence and functioning of an individual in a society and in the environment (Brezovšek and Črnčec, 2007, p.17). Thus security is a social phenomenon which is related to all entities, that is both to the individual as well as to all organizational forms of networking and integration, at any level. Contemporary security discussions are mainly addressing the following three references: first, who the security refers to; second, the origins of security threats; and third, what security mechanisms should be employed for the provision of appropriate level of security (Liotta in Svete 2005, p. 55).

Post-modern or more complex approaches to dealing with security, where also non-state actors have started to enter security discussions, go back to the beginning of 1970s. However, this new or modern understanding of security could be linked with the end of the Cold War and processes in international community that followed, when man and his security have increasingly been stressed out among references. Moreover, discussions on security entities, security as emancipation, danger dilemma, social and human security and risk society have become more and more legitimate (Newman in Svete, 2005, p. 57). These rather complex security definitions should be understood as a consequence of rapid social development, and changes to the international environment and traditional concept of threat.

The large number of references may lead to the conclusion that there is no consensus in contemporary security studies about references, due to excessive interconnectedness and interdependency. Similarly, sources of threat cannot be determined based on a single reference. In addition, it should be noted that references may not necessarily be only facilities under threat, but may also present potential sources of threat to other references. On this basis, it could be concluded that the period concerned has been characterized by an increase in the number of non-military sources of risk, and also in the number of references that may be potentially affected. A new understanding of security and the related threats will only be possible to develop in the future due to an increase in the number of references and not so much due to sources of threat, be it real or detected.

The provision of security requires financial resources. These, however, often lack in a modern changing environment, or at least their distribution is not proportional. One of the reasons for such situation is globalization. According to Lechner (2009, pp. 15-16), globalization is a "process in which an increasing number of people are connected in different ways across larger distances. It refers to transplanetary – and recently also to supraterritorial – connections between people, ranging from reduction of boundaries to transglobal social contacts."

One of the forms of globalization that is closely connected to financial resources is economic globalization. Bhagwati (2004, p.3) defines economic globalization as a form of integration of national economies into international economy through the international trade, exchange and production, foreign direct investment, short-term capital flow, international labour migration and transfer of technology. Such understanding of globalization strongly emphasizes economic efficiency, new knowledge and ideas, market behaviour and management, global market competition, facilitation of foreign direct investment and efficient allocation of production factors.

Globalization can also be seen as liberization in relation to the processes of international economic integration in which political barriers to trade and investment in global economy between countries have been removed. It is also associated with the concept of deterritorialization in terms of reorganization of social space which is no longer controlled by territorial space or territorial boundaries. This results in the reduction of trade barriers, thus bringing progress to transport, flow of resources, capital¹, services, technology, ideas, information and communications, and allowing for global dispersion of activities and creation of economies of scale (Kovač et al., 2008, p. 54).

Economic globalization is not an unstoppable or irreversible process, and it does not have a short-term influence. On the contrary, it causes long-term structural changes in the global economy, especially in the nature and scope of integration of different factors, investments and end markets. Most theorists (Kovač et al., 2008, p. 59) believe that economic globalization presents new challenges to the national state. Due to rapidly-growing markets, some nation states have lost or have been slowly losing their supremacy, power and autonomy, and have had increasingly less control and influence over social and economic processes in their traditional space. Liberation, privatization and deregulation have changed their traditional role of the nation state. According to Rizman (2001, p. 31), only those nation states that are willing to adapt and modernize their internal policy and in international space can hope for their long-term survival and development. The old type of nation states can no longer exist in modern international environment, as contemporary challenges require different operational contexts of a nation state.

In such a complex, dynamic and interdependent modern international security environment, subjected to unpredictable global changes, and given the variety and multiplicativity of modern sources of threat and security risks, countries can no longer autonomously ensure their own national security. Furthermore,

integration and partnership cooperation as well as multinational participation in various projects are essential also in terms of limited financial resources for the development of required military capabilities. The Republic of Slovenia was no exception in this and by entering into the EU and NATO, the two key factors assuring international peace and stability in the Euro-Atlantic region, Slovenia was granted access to a community that provides long-term stability, support, cooperation and security at regional level and in the wider environment.

The new NATO Strategic Concept adopted in 2010 is yet another proof that the international environment is highly complex and requires a multidisciplinary approach and continuous adaptation to new threats and security challenges. The decisions of the Lisbon summit also pertain to structural reforms, capability transformation, commitment to the principles of the United Nations Charter, and strengthening of relations with the EU and the Alliance's open door policy. Realising the importance of the security situation and as the exit strategy in the current situation, NATO Secretary General, A. F. Rasmussen introduced already in 2011 at the Munich Security Conference 2011 the following initiative on behalf of NATO: "I know that in an age of austerity, we cannot spend more. But neither should we spend less. *So the answer is to spend better. And to get better value for money. To help nations to preserve capabilities and to deliver new ones. This means we must prioritize, we must specialize, and we must seek multinational solutions. Taken together, this is what I call Smart Defence².*"

The discussion in the continuation will present the impact of financial resources on the establishment of contemporary security paradigm in defence area, with the focus on defence capabilities in selected countries. Using the comparative method, financial resources earmarked by the nations for the operations in this area will be defined, as well as the impacts, similarities and differences brought about by the trends in financial resources that are earmarked for the operations of defence systems. The impact and establishment of contemporary security paradigm can be best seen from the trends in the provision of financial resources earmarked for the building and operability of defence capabilities in selected countries. The data acquired from various Slovenian and foreign sources have been analyzed using a qualitative approach, followed by a secondary interpretation of statistical results. In connection with the above-mentioned method, the analytic-synthetic method has also been adopted to analyze various written sources in detail, whereas an analytic approach was used in the search and proper evaluation of common points.

The research presented in this paper has, of course, employed both the inductive and the deductive research methods. The first has been used in conclusions, summaries and personal reflections, which include some key findings of the entire analysis, whereas the second has been used in the remaining part of the paper.

Table 1:
Selected
countries

After a thorough analysis on how to obtain relevant and comparable results¹, the following countries have been selected for comparison:

No.	Country	Neighbouring country	NATO member country	Neutral country	Mandatory military service
1.	Republic of Austria	X		X	X
2.	Italian Republic	X	X		
3.	Republic of Hungary	X	X		
4.	Republic of Croatia	X	X		
5.	Republic of Slovenia		X		

Table 1 (Selected countries) includes Slovenia and its four neighbouring countries, of which Italy, Croatia and Hungary are NATO members with professional armies, whereas Austria has the status of neutrality and still has mandatory military service.

The comparative analysis examines the period from 2005 onwards, after following Slovenia's full membership of the EU and NATO in 2004. The data on various indicators of the selected countries have been acquired from the Military Balance 2005–2012² (The International Institute for Strategic Studies, IISS), which proved most credible, transparent and comparable during data collection, while data on the defence budget trend³ for the period 2010–2015 and on the defence system structure of the selected countries have been obtained from the IHS Jane's: Defence & Security & Analysis. Originally, the data on financial indicators in the Military Balance are expressed in U.S. dollars, but have been converted to Euro for convenience sake⁴. The paper presents and analyses the following key indicators: gross domestic product, expressed in the amount – GDP; gross domestic product *per capita* or per inhabitant, expressed in Euro (in 1,000) – BDP pc; the amount of defence budget, expressed in Euro – DB; and the amount of defence budget, expressed in % of the GDP – DB.

¹ For the sake of convenience, the obtained results are presented in a table. After the quantitative data of mutually comparable countries have been gathered, they will be listed in tables and charts, as appropriate, and processed using different methods. At the end, an interpretation is given.

² The case of Austrian GDP amount expressed in USD will be used to show the differences that arise due to information from various sources. According to IHS Jane's Defense & Security Intelligence & Analysis, the GDP amounts to \$320 bn.; according to CIA's the World's Factbook it is \$376.8 bn.; and according to Global Finance, it totals \$405.6 bn. The differences range from 1.8% up to 9.5%. On the basis of this example, it can be concluded that the differences occur depending on the institution collecting the data, especially on whether it is state- or private-owned. This conclusion also applies to all the countries included in this analysis.

³ For Austria and Croatia, the financial burden of the defence system is determined in the defence budget. Therefore, only the defence budget, regardless of defence expenditure, will be used for a valid and uniform comparison to other countries.

⁴ The currency exchange from USD to EUR or national currencies in USD and later in EUR is based on the foreign exchange rate used in the Military Balance, which was applicable at the time of performing the analysis. The currency rate was as follows: 1 USD = 0.79 EUR in 2005; 1 USD = 0.78 EUR in 2006; 1 USD = 0.70 EUR in 2007; 1 USD = 0.74 EUR in 2008; 1 USD = 0.67 EUR in 2009; 1 USD = 0.76 EUR in 2010; and 1 USD = 0.71 in 2011.

1 THE INFLUENCE OF FINANCIAL RESOURCES ON DEFENCE CAPABILITIES OF THE REPUBLIC OF AUSTRIA

The body implementing the defence policy of the Republic of Austria is the Ministry of National Defence and Sport (hereinafter referred to as MoD) which is, in addition to national defence, responsible for the Austrian Armed Forces. In accordance with their Constitution, the President is the Commander-in-Chief of the Austrian Federal Army. The armed forces of Republic of Austria are represented by the Austrian Armed Forces (hereinafter AAF).

The following findings are based on the analysis of key financial indicators which ensure the implementation of tasks and missions of the Austrian defence system.

Table 2:
Key indicators of the Austrian defence system

Financial indicators	2005	2006	2007	2008	2009	2010	2011
GDP	245 bn.	262 bn.	270 bn.	282 bn.	281 bn.	284 bn.	301 bn.
GDP pc	29.9	32	31.9	34.5	30.5	33.9	36.7
DB	1.81 bn.	1.81 bn.	2.25 bn.	2.03 bn.	2.11 bn.	2.12 bn.	2.06 bn.
DB (%)	0.73	0.69	0.83	0.72	0.77	0.75	0.68

Figure 1:
Defence budget estimates for the period 2012–2015



The level of defence budget is one of the lowest among the EU member states. Figure 1 shows that estimates indicate an additional 30-percent decrease (approximately €600 bn.) by 2015, which will greatly hamper transformation effort of the Austrian Federal Army into a fully professional army. Almost 10-percent cut of budget for the

period 2008–2010 has resulted in a decreased peacetime structure, partly also due to a decrease in the number of soldiers doing mandatory military service. Moreover, numerous planned replacements and modernization of weapons systems have been postponed until after 2010. According to Military Balance 2012, the Austrian MoD is planning further prolongation of defence weapons system modernization, downsizing of members of the Austrian Federal Army deployed to international operations and missions, and selling off of real estate, due to a downward trend in defence expenditure. Furthermore, Austria is also planning the transformation of the armed forces.

Priority tasks in the area of defence, in accordance with available financial resources, are given below:

1. According to strategic directives, the Austrian defence system should consist of 21,000 members of the peacetime structure and 24,000 members of the reserve component. The number of other personnel employed at the Ministry of National Defence and Sport should be 10,000 or 55,000 in total.
2. Conscription is likely to remain the basis of defence security policy. Nevertheless, more attention will be given to modernization of the reserve component and the service in the armed forces.
3. In addition, in the future, greater attention will be paid to cooperation with European partners as regards joint forces and full use of common capacities in order to increase efficiency and reduce the costs of EU operations and involvement in the European Battle Groups (EUBG) concept.
4. The mission and tasks of the Austrian Federal Army should mostly be shifted from the protection of sovereignty (as part of the national military defence) to relief operations⁵ during natural and other disasters as part of the crisis management.
5. Changes of the primary purpose also involve changes to human resources, equipping, and especially to adaptation of legislation (Constitution, the Military Act and Labour Law).

2 THE INFLUENCE OF FINANCIAL RESOURCES ON DEFENCE CAPABILITIES OF THE ITALIAN REPUBLIC

The body responsible for the implementation of defence policy of the Italian Republic is the Ministry of Defence (hereinafter referred to as MoD), which is also responsible for civil defence and meteorology. In accordance with the Constitution of Italy, the President of the Italian Republic presides over the Supreme Council of Defence and is the Commander-in-Chief of the Italian Army. In war, the Prime Minister of Italy is Commander-in-Chief. The Italian military is represented by the Italian Army.

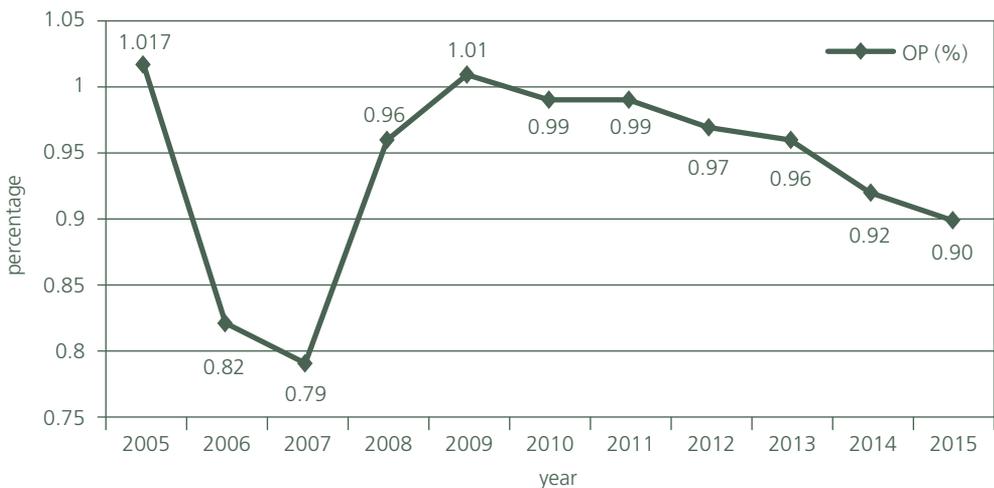
The following findings are based on the analysis of key financial indicators which ensure the implementation of tasks and missions of the Italian defence system.

⁵ *The Austrian Armed Forces are assuming an increasingly greater responsibility and initiative in this area. They have also been playing a more active role in helping people at risk by providing them with supplies and transport, and have actively participated in injured and missing persons search and rescue operations.*

Table 3:
Key
indicators of
the Italian
defence
system

Financial indicators	2005	2006	2007	2008	2009	2010	2011
GDP	1,370 bn.	1,470 bn.	1,550 bn.	1,610 bn.	1,510 bn.	1,560 bn.	1,590 bn.
GDP pc	23.6	25.2	26.7	27.6	26.1	28.1	25.9
DB	14 bn.	12.1 bn.	12.4 bn.	15.4 bn.	15.4 bn.	15.5 bn.	15 bn.
DB (%)	1.017	0.82	0.79	0.96	0.99	1.01	0.99

Figure 2:
Defence
budget
estimates for
the period
2012–2015



We can see a 20% fluctuation in defence budget for the entire comparative period 2005–2011. Similarly, Table 2 shows no increase in fluctuation. By 2015, the GDP is expected to decrease further to as low as 0.9% or by 10%. In 2012, additional financial resources in the amount of €1.5 bn. were allocated (extra-budget) for smooth operational functioning and public procurement.

65.4% of defence budget is allocated to personnel costs, which consequently reduces financial resources intended for operations and readiness as well as for investments. Cost and salary intervention is currently not anticipated for the members of the Italian Army. 10.4% of defence budget are earmarked for training and operations, which is considerably less than the anticipated 30%. This downward trend might threaten operational capability of the armed forces, and a dilemma occurs whether such intervention in the manpower could actually facilitate army modernization. Italy, too, is facing the fact that the professional army is significantly more expensive than the army based on conscription, if all comparable parameters are considered.

In addition, it has planned a prolongation of weapons systems modernization and further selling off of real estates. In this connection, the balance between

modernization and maintenance should constantly be sustained, as they facilitate smooth operations and future procurement. When the operating cycle of an asset expires and there is no proper maintenance or replacement available, the delay in a program, maintenance or a new investment may have a significant impact on its functioning.

Despite the defence budget cuts, financial resources allocated for the Carabinieri operations will have increased due to the changing security situation⁶. This means that the financial resources will have been relocated within the defence system.

Priority tasks in the defence area, in accordance with the available financial resources, are given below:

6. For the national defence purpose and as a NATO member state, Italy will continue its cooperation with the Alliance Forces and will, therefore, ensure interoperability, mobility and effectiveness of its operations as well as maintenance of its capabilities.
7. In the near future, mainly due to the existing financial situation and the operational capability gaps of the Italian Army, Italy will need to revise its defence policy and strategy and the obligations arising from alliances, taking into account its national interest at the same time.
8. Despite the continuous savings plan and cuts in defence budget, Italy shall promote full integration among national military components, maintain a high operational tempo and continue to participate in multinational operations and provide operability with the allied forces.
9. Upon completion of the reform, the Italian peacetime structure will be composed of 150,000 members, which means a 18.4% reduction in manpower.

3 THE INFLUENCE OF FINANCIAL RESOURCES ON DEFENCE CAPABILITIES OF THE REPUBLIC OF HUNGARY

The body responsible for the implementation of defence policy of the Republic of Hungary is the Ministry of Defence of Hungary (hereinafter referred to as MoD). In accordance with the Constitution of Hungary, the President is the Commander-in-Chief of the Hungarian Defence Force. The Hungarian defence forces are represented by the Hungarian Defence Force⁷.

The findings below are based on the analysis of key financial indicators which ensure the implementation of tasks and missions of the Hungarian defence system.

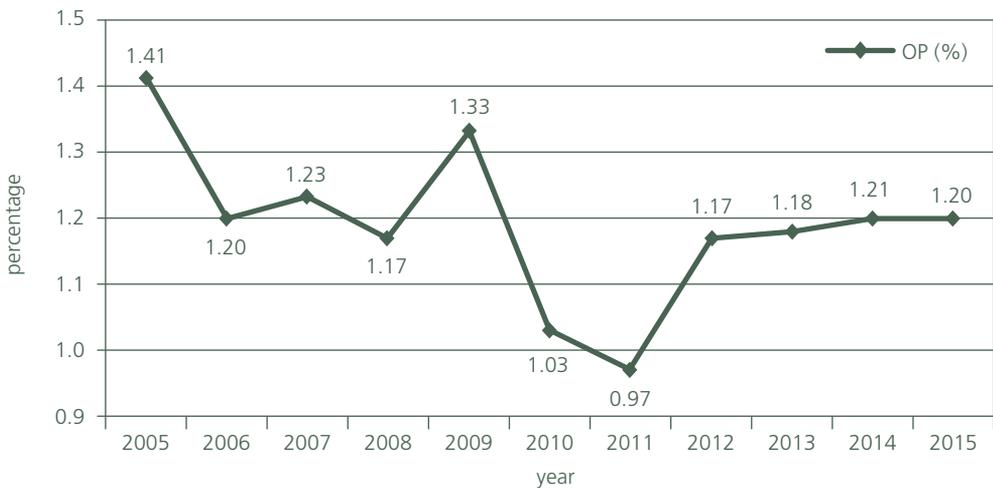
⁶ *Such as an increasing number of illegal immigrants, the pressure on the Italian borders and higher levels of corruption and organized crime.*

⁷ *In war or in conflict, Hungarian defence forces are augmented by 12,000 members of Border Guard. In peacetime, the Hungarian Border Guard forms an integral part of the National Police.*

Tabela 4:
Key
indicators of
the Hungarian
defence system

Finančni kazalniki	2005	2006	2007	2008	2009	2010	2011
BDP	86,9 mlrd.	84,2 mlrd.	102 mlrd.	102 mlrd.	93,1 mlrd.	98,8 mlrd.	102,9 mlrd.
BDP pc	8,4	8,4	10	10	9,3	9,8	10,3
OP	1,12 mlrd.	1,01 mlrd.	1,26 mlrd.	1,2 mlrd.	1,24 mlrd.	1,02 mlrd.	1 mlrd.
OP (%)	1,41	1,20	1,23	1,17	1,33	1,03	0,97

Figure 3:
Defence
budget
estimates for
the period
2012–2015



There is a 26.9% downfall in defence budget for the entire comparative period 2005–2011, although the National Military Strategy adopted in 2008 planned an increase of 0.2% of GDB in defence budget for the period 2009–2013. According to Military Balance 2011, the Hungarian MoD is planning prolongation of defence weapons system modernization⁸ amounting to 20% of defence budget, and selling off of real estate, due to a strong downward trend in defence expenditure resulting from the revised national budget. Cost and salary intervention is currently not envisaged for the members of the Hungarian Defence Force.

Hungary, too, is confronted with the fact that a professional army is significantly more expensive than a conscript army, considering all comparable parameters.

Priority tasks in the defence area, in accordance with the available financial resources, are given below:

1. According to Military Balance 2012, the plans for the near future include, among other things, transformation or a new organizational structure of the defence staff,

⁸ The plans involve modernization of aircraft capabilities, procurement of new military vehicles and upgrading of communications and information systems (CIS).

changes in defence planning, increased participation in diplomatic activities involving partner states, transformation of the military medical system, changes in the officer personnel training, and a review of the situations, in companies delivering different services to the Hungarian MoD under service contracts.

2. The tasks deriving from the Strategic Defence Review 2003 and Defence System Operational Guidelines 2005 remain unchanged⁹.
3. In no instance should economy measures affect operational readiness and implementation of long-terms plans¹⁰.
4. Finally, the plans also support the development of the Army component in terms of establishing a deployable brigade and intelligence capabilities.

4 THE INFLUENCE OF FINANCIAL RESOURCES ON DEFENCE CAPABILITIES OF THE REPUBLIC OF CROATIA

The body, implementing the defence policy of the Republic of Croatia, is the Ministry of Defence (hereinafter referred to as MoD) which is, in addition to national defence, responsible for the Armed Forces of the Republic of Croatia. In line with the Constitution of the Republic of Croatia, the President is the Commander-in-Chief of the Croatian Armed Forces. The Croatian military is represented by the Armed Forces of the Republic of Croatia.

The following findings are based on the analysis of key financial indicators which facilitate the implementation of tasks and missions of the Croatia's defence system:

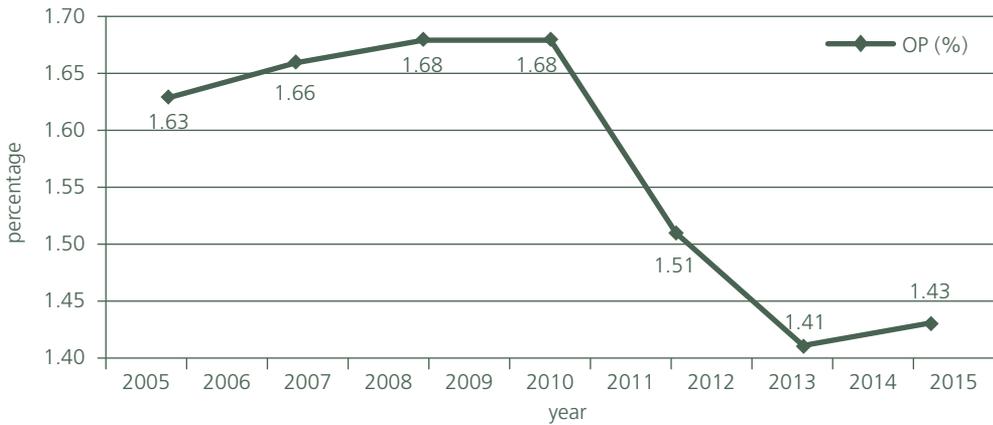
Table 5:
Key indicators
of the Croatian
defence system

Financial indicators	2005	2006	2007	2008	2009	2010	2011
GDP	30.2 bn.	33.3 bn.	36.3 bn.	42.1 bn.	45.1 bn.	48.1 bn.	46.3 bn.
GDP pc	6.7	7.4	8	9.4	10	10.4	10.3
DB	494 mio.	555 mio.	612.5 mio.	712 mio.	683 mio.	655.8 mio.	663.8 mio.
DB (%)	1.63	1.66	1.68	1.68	1.51	1.41	1.43

⁹ Some principal tasks are: Article V NATO-led operations, including the Hungarian military defence and assistance to other member states in collective defence; support in the implementation of border security tasks; host nation support; participation in international counter-terrorism activities; support to civil authorities, including in SAR and UXO operations; and assistance in the eliminating of consequences of natural and other disasters.

¹⁰ In line with the National Military Strategy, Hungary is planning to employ up to 3,000 new members, who would relieve the existing manpower in carrying out their missions in international operations. Furthermore, the strategy concerned envisages the establishment of a voluntary military service and a voluntary contract reserve system, which would consist of 4,000 members by 2014. The existing reserve component is to be gradually replaced by the voluntary contract reserve, where members may be called up in the event of war or crisis situation.

Figure 4:
Defence
budget¹¹



By introducing fundamental reforms and entering into NATO, the GDB for defence purposes would be expected to increase to achieve 2% of GDB, as anticipated by NATO. However, Figure 4 shows the GDP for the period 2008–2010 decreased from 1.68 to 1.41 or by 16%, which equals to a nominal amount of almost €57 mio.

According to the data obtained from Military Balance 2012, the Croatian MoD is planning prolongation of defence weapons system modernization¹², to which only 5% of defence budget is currently allocated, and selling off of real estate, due to a strong downward trend in defence expenditure resulting from the revised national budget. 70%¹³ of defence budget is earmarked for costs and salaries of the Croatian Armed Forces members. Intervention into this expenditure is currently not envisaged.

Below are priority tasks in the defence area, in accordance with the available financial resources:

1. After the admission to NATO and in accordance with long-term development plans, the Armed Forces of the Republic of Croatia will continue to modernize, with the efforts to achieve high level interoperability and integration into NATO and EU structures.
2. Croatia plans to reform and complete the restructuring of the MoD in terms of increased management capabilities of defence ministry, in accordance with NATO standards. Among other things, it also plans to establish a Joint Force Command which would be responsible for the comprehensive integrated planning and conduct of operations, in accordance with NATO standards.
3. New strategic and doctrinal documents are being drafted, including the national and security strategy, defence and military strategy, and the updated long-term development plan.
4. Finally, Croatia will continue to adopt NATO standards, especially in the field of human resources management and defence planning. The long-term development

¹¹ No technical publication to provide the data for the period 2012-2015.

¹² The planned large-scale contracts include the purchase of 12 multi-purpose aircraft and patrol boats.

¹³ The long-term development plan for 2006–2015 anticipates the reduction of the related costs, with the maximum of 50% of defence budget.

plan for 2006–2015 anticipates the abolishment of the traditional reserve component and plans to establish the voluntary contract reserve with 6,000 members.

5 THE INFLUENCE OF FINANCIAL RESOURCES ON DEFENCE CAPABILITIES OF THE REPUBLIC OF SLOVENIA

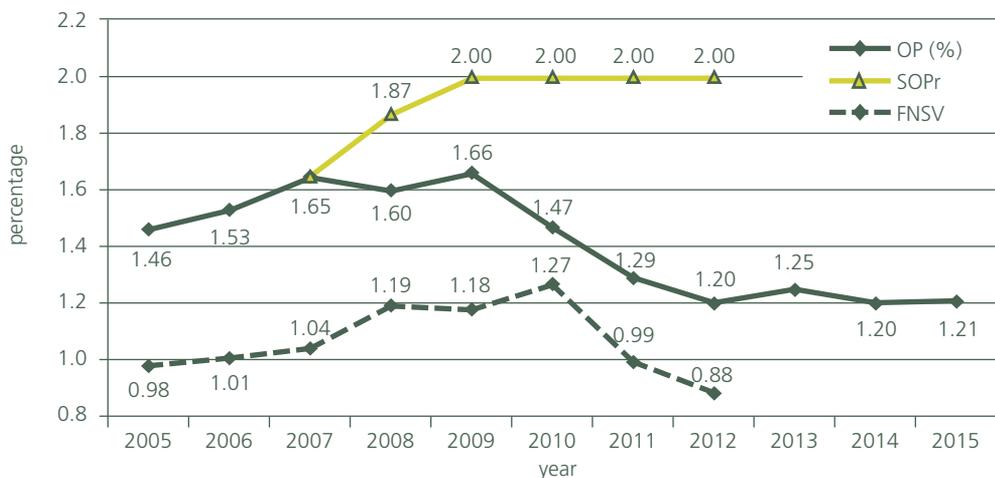
The body responsible for the implementation of tasks in the defence system and the system of protection against natural and other disasters of the Republic of Slovenia is the Ministry of Defence (hereinafter referred to as the MoD). In addition to military defence operations, conducted by the Slovenian Armed Forces either independently or within the alliance, the MoD is also responsible for civil defence. Through the implementation of activities which contribute to national defence, other national authorities, local community bodies and civil society organisations of special significance for the defence are also included in the defence system. In line with the Slovenian Constitution, the President of the Republic of Slovenia is the Commander-in-Chief of the Slovenian defence forces, which are represented by the Slovenian Armed Forces.

The following findings are based on the analysis of key financial indicators which ensure the implementation of tasks and missions of the Slovenian defence system:

Table 5:
Key indicators
of the Slovenian
defence system

Financial indicators	2005	2006	2007	2008	2009	2010	2011
GDP	30.2 bn.	33.3 bn.	36.3 bn.	42.1 bn.	45.1 bn.	48.1 bn.	46.3 bn.
GDP pc	6.7	7.4	8	9.4	10	10.4	10.3
DB	494 mio.	555 mio.	612.5 mio.	712 mio.	683 mio.	655.8 mio.	663.8 mio.
DB (%)	1.63	1.66	1.68	1.68	1.51	1.41	1.43

Figure 5:
Defence
budget
estimates for
the period
2012–2015¹⁴



¹⁴ The figure of Slovenia shows the planned financial resources derived from the Mid-Term Defence Programme (SoPr) for 2005–2010 and the applicable SOPr for 2007–2012, the Government's revised budget proposal for 2012 as well as projected defence resources up to 2015, arising from the 2011–2016 SOPr proposal.

In the entire comparative period, Slovenia developed a relatively high level of GDP growth until 2009, when its defence budget fell by 22.3% to 1.29%, the military expenditures of which present only 0.99% of GDP. In terms of the nominal value, the defence budget for 2011 is almost equal to the financial resources earmarked for defence in 2006. The reduction in budgetary resources also brings the reduction in financial resources earmarked for the operations of the SAF, as shown by the line chart of financial resources in the SAF (SAF FR). Slovenia too, has been hit by the economic and financial crisis, which has also affected its defence budget level. GDP growth is not expected to increase. Quite the opposite, an additional reduction to 1.20% of GDP or an additional downfall by 7% is anticipated by 2014, of which military expenditures would present only 0.88 % of GDP. The GDP spent on defence is expected to gradually increase to 1.21% only as late as by 2015. Thus, military expenditures would have increased to 0.97% of GDP.

The downward trend in defence financial resources presents an even greater problem to Slovenia due to the country's rapid transition from a labour-intensive compulsory service to a professional army, which is a very intensive concept in terms of finance. This does not mean that a professional army is more expensive than a conscript army in nominal financial terms. Nevertheless, its efficiency and operability largely depend on the quality of its weapons systems and equipment or available financial resources intended for the development, building and maintenance of its capabilities. A continued downward trend might have a long-term impact on all of the positive effects which the defence system and the SAF have been achieving since the transition to a professional army.

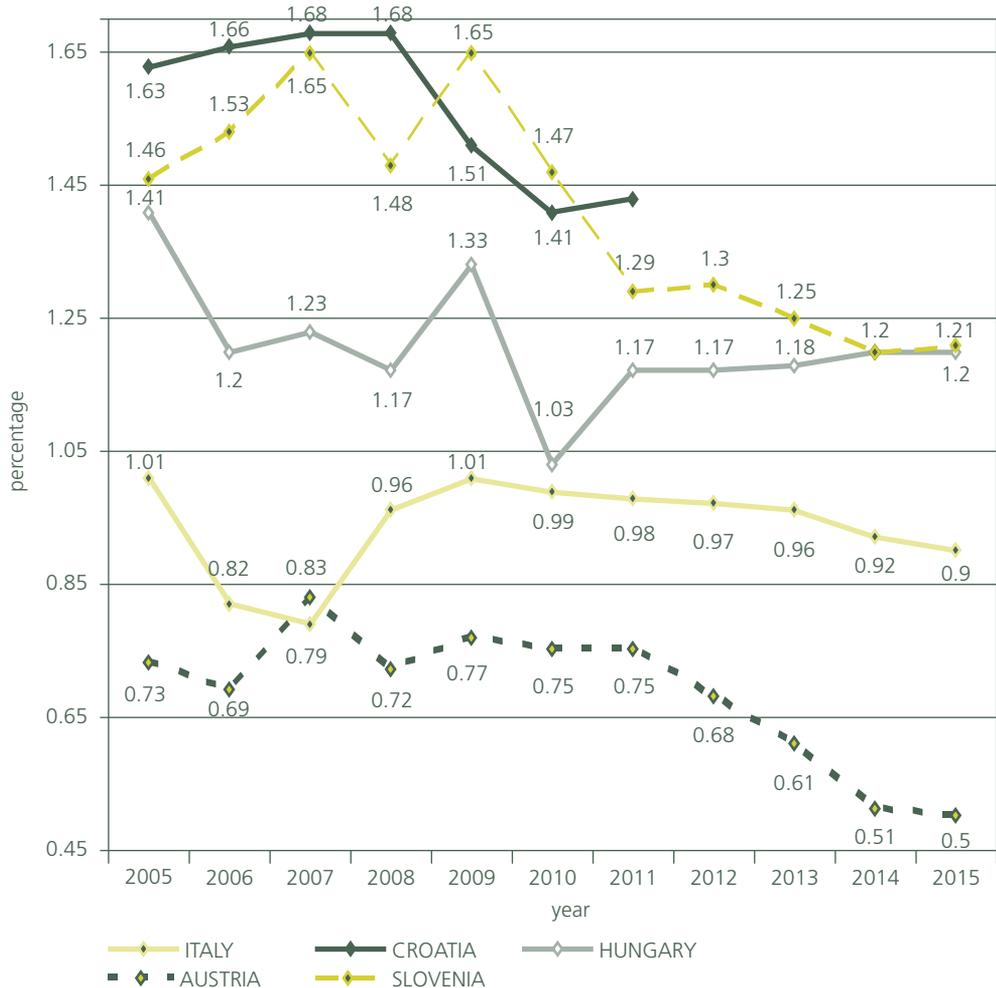
Priority tasks in the defence area, in accordance with the available financial resources, are the following:

5. to consider the ambitions and priority tasks on the basis of the Resolution on Basic Long-term Development and Equipping Programme of the Slovenian Armed Forces up to 2025, and to set minimum standards to ensure national security and implementation of statutory tasks;
6. to continue with the reforms, including the SAF, in line with the strategic guidance documents, and to develop the SOPr for 2013–2018; to follow a comprehensive approach to planning and use of available financial resources earmarked for the development, building and maintenance of its capabilities;
7. to create the starting points for negotiation with the Alliance over a new package of capability goals; to streamline the scope of training and international operations in terms of Slovenia's adaptation to foreign-policy and international obligations related to the SAF's participation in international operations, in accordance with the available (mainly financial) resources; Continued integration into the NATO and EU defence system structures and playing an active role in the area of peace-support and stability operations remain Slovenia's priorities;

8. to establish and improve the crisis management system and the provision of civilian capabilities in consideration of the current civil defence system.

The line chart below shows an analysis of key financial indicators of the selected countries in comparison with Slovenia¹⁵.

Figure 6:
Defence budget for the period 2005–2011 with the estimates for up to 2015



The line chart above (Figure 6) shows that the percentage of the GDP spent on defence by the selected countries during the period 2005–2011 decreased most in the new NATO member states: from 1.63 to 1.43% (by 14.8%) in Croatia and from 1.41 to 0.97% (by 31.2%) in Hungary. The fluctuations of Slovenia's GDP indicated positive

¹⁵ According to the data in Annual Report of the MoD for 2010.

trend up to 2009, but were followed by a decrease to 1.29% of GDP (-22.3%). The percentage of GDP of Italy and Austria (0.75%) remained almost the same through the entire comparative period. Austria has the lowest percentage of GDP earmarked for defence expenditure also on a European scale. Slovenia earmarks the highest percentage of GDP for defence expenditures of the selected countries, although with the value of €462 mio., it is ranked by far in the last place.

However, it is interesting to observe the fluctuations in the trend (percentage) level of the defence budget up to 2015. Most countries can expect a further decrease by 2014, when the slope of the yield curve should finally become positive. Italy and Austria cannot expect a positive trend by 2015, but they can expect the reduction in their defence budgets to be smaller. Hungary, unlike Italy and Austria, has made more optimistic forecasts, as its annual defence budget is expected to increase from 2012 onwards. The yield curve representing Slovenia's defence budget is expected to hit the bottom in 2014, when its slope should finally become positive.

Conclusion In addition to major historic events after the end of the Cold War, the paper also touches upon conversion and defence restructuring, two parallel on-going processes, typical of the countries that used to be part of the Bloc Alliances during the Cold War. Their presence can also be seen in the countries that were neutral or non-aligned in their foreign policy with regard to any of the former blocs.

All of the analyzed countries have undergone defence restructuring and have continued or completed the process more or less successfully. The fact that this is an on-going process can be seen in all of them, as defence system reforms present a constant effort in every long- and short-term plans. The trend of defence capabilities is moving towards the restructuring of forces as part of traditional maneuver units intended for the defence of the territory, into modern, rapid response, flexible, mobile, re-deployable, interoperable units equipped with modern weapons systems, integrated into the Allied force structures, which are capable of carrying out a wide range of operations at different levels of intensity, expeditionary and asymmetric warfare, acting as a stabilizing force in international operations, and ensuring the military defence of the national territory. The adopted NATO standards present an important principle in transformation used in order to provide interoperability, robustness, high level of force protection and mobility, equipment and support. Austria is no exception, despite its neutrality.

One of the important findings shows that all the countries with a professional army are facing considerably higher costs, or that such an army is significantly more expensive than a conscript one, considering all comparable parameters. The situation has been worsened by an economic and financial situation, bringing a further decrease in financial sources, including those in support of defence system operations. The comparative analysis shows that no country is immune to the consequences of financial resources decrease. The difference lies only in the manner or the part of the defence

system where rationalization is approached. Expressed in percentage, between 60% and 70% (and more) of defence budget is earmarked for personnel costs, between 20% and 25% for operations and readiness, and only between 10% and 15% for infrastructure and equipping. For comparison purposes, NATO standards¹⁶ for medium-developed countries, including Slovenia, are listed which earmark 50% of financial resources for human resources management, education and support, 30% for operations, and 20% for infrastructure and equipping.

The analysis shows that human resources have been most affected/exposed. Moreover, the reduction in peacetime structure forces and weapons system maintenance and procurement continues, whereby the majority of financial resources have been earmarked for the maintenance of existing defence systems and increasingly fewer for the procurement of new ones. The purchase and delivery of ordered assets have often been prolonged.

Despite the announced reforms, none of the NATO member countries reached the planned 2% GDP level of financial resources spent on defence. The slope of the yield curve representing defence budget level is expected to become positive only after 2013. However, these are only estimations, and it is possible for the negative trend yield to continue in the future, beyond 2015.

The present economic and financial situation and, consequently, the geopolitical and security situation are very uncertain. Unpredictability and uncertain future of the EU, to focus only on the "old continent", which was created, among other reasons, to prevent the recurrence of nationalism in its worst, will require close monitoring of action in the selected and other countries, including the yield point at which the trend in reduction of financial resources intended for the operation of the defence system stops. Throughout history, we have learned several times that the escalation of crisis in economic or financial sector creates a crisis in the political environment, which could affect security and stability in a country and its internal security situation. Escalation of tensions, the emergence of different factors of uncertainty that might cause social unrests, instability or even open conflicts due to intense internal and international situations, as well as a possible inability of a country's internal security system to properly function demand from the political leadership to legitimately use its own armed forces in subsiding the situation. Any random or continuous downsizing of the armed forces in terms of human, financial and material resources can lead to their inability and incompetence to operate, not only as regards their assistance in the internal security system operation in the scenario concerned, but also with regard to their primary mission, i.e. military defence of the state. Moreover, the ability to provide assistance and maintain the operation of the system of protection against natural and other disasters is also questionable.

¹⁶ *These standards facilitate the development of interoperable capabilities of individual Alliance members integrated into the Alliance structures which are able to operate in international stability operations.*

Member states of the Alliance are obliged to participate actively in different subject areas. The basis is a successful implementation of processes and activities, at the national level. In doing so, the country is not isolated or self-sufficient, but has to consider other different factors or effects of international environment when trying to ensure its national interest. In times when financial resources decrease, cooperation between NATO state members and their partners is especially significant, as encouraged by the Smart Defence concept. The countries adapt to the situation in different ways, yet in order to protect their national security interest, the transformation of the defence system should be approached primarily through efficient operation, which demands integrity of its structure, appropriate organization, effective management, command and control, appropriate level of readiness and response as well as balanced development of capabilities that are able to operate in integrated joint operations in the national and international environment.

In line with the national strategic guidance documents and with the aim of long-term stability and security provision, Slovenia will undertake the building of new and transformation of the existing defence capabilities. With regard to its national interests and objectives, Slovenia's defence system will have to be adapted based on realistic starting points and long-term availability of its human, material and financial resources, while following constitutional and statutory tasks. Therefore, the changes in the defence system will have to focus on balanced development, maintenance and efficiency of defence forces, and capabilities which will ensure consistency of and timely response to contemporary sources of security threats and risks on the one hand, and on greater interoperability and operational capability in terms of provision and operation of its own capabilities within the Alliance, particularly within NATO and the E, on the other. In addition to the internal publicity, the crucial role in this process will also be played by a wider social environment with its own expectations and demands, and to key political state actors. The undeniable fact remains that only timely and comprehensive transformation of the defence system will provide a more efficient support to the defence system and, as required, also to the system of protection against natural and other disasters.

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OBVEŠČEVALNA DEJAVNOST IN NOVA PARADIGMA VOJSKOVANJA

INTELLIGENCE AND THE NEW PARADIGM OF WARFARE

Povzetek Zaradi socialnega, gospodarskega in političnega razvoja po drugi svetovni vojni je prišlo do dveh vzporednih paradigem vojne: konvencionalnih meddržavnih vojn in asimetričnih spopadov med državo in nedržavnimi nasprotniki. Vzporedne paradigme obstajajo tudi na obveščevalnem področju in od obveščevalnih strokovnjakov zahtevajo nove načine razmišljanja ter nove postopke.

Ključne besede *Asimetrično bojevanje, R2P, odgovornost zaščititi, obveščevalna dejavnost, nedržavni nasprotnik, upornišтво.*

Abstract The social, economic and political developments following WW II resulted in two parallel paradigms of warfare: that of conventional interstate wars, and that of asymmetric conflicts between the state and non-state belligerents. The parallel paradigms also exist in the intelligence field, and demand new ways of thinking and new procedures from intelligence professionals.

Key words *Asymmetric warfare, R2P, responsibility to protect, intelligence, non-state belligerent, insurgency.*

A flaw in western asymmetric warfare doctrines

In the last decade or so, western (primarily European and North American) armed forces have come to grips with the challenges of asymmetric warfare. New doctrinal publications and scholarships have recognized the threat that non-state belligerents pose to their own governments and to other nations, and have outlined ways to meet the challenge. New regulations and field manuals have been issued and validated on the battlefield in Iraq, Afghanistan and elsewhere by various national forces. Yet they have one serious flaw (one they share with the national

and international security and defense strategies¹ and much of the professional literature): they discuss the challenge of non-state belligerents as an entirely foreign phenomenon, something that western forces would encounter only overseas, in the failed states of the third world.

This approach is not entirely unjustified. It is indeed in the unstable states of Asia and Africa where western troops have been deployed on counterinsurgency or stability operations. It is also an undisputable fact, that in the western world such conflicts have so far taken place only on Europe's periphery (Northern Ireland, Transnistria, the Balkans, the Caucasus). However, there are no guarantees that this happy state of affairs will endure. Domestic enemies may form alliances and acquire powerful foreign backers – a combination that may be beyond the capacity of law-enforcement agencies, thus making the deployment of the armed forces necessary. Even if no serious domestic challenges develop, this detachment limits the effectiveness of western forces deployed overseas on stability missions, because it encourages them to remain aloof, alien presence and view the conflict only in the light of national or international command authority directives, and only through the prism of doctrine and past experience gained in other theaters. In order to be truly effective, western forces must have a more thorough understanding of the conflict than that provided by these authoritative sources of guidance. They must understand the point of view of the local political elite, which faces liquidation if the insurgents win; they must view it from the perspective of the commanders and men of the local security forces who do much of the fighting and dying, and they must see it with the eyes of the local citizens who are caught between the millstones of the insurgents and the security forces. Such understanding requires more than just ignoring references to "Host Nation" in Field Manuals and professional journals.

The following paper attempts to contribute to that understanding by focusing on a narrow (albeit crucial) aspect of counterinsurgency: intelligence and counterintelligence, *from the perspective of the state and society under attack*. The author does not pretend to know better than those who developed current western doctrines and validated them under hostile fire. His intention is not to contradict the doctrines, but rather to complement them by brushing in details that doctrinal publications – due to their more general nature – leave out, and to identify some areas where doctrine may have to be supplemented.

1 PARALLEL PARADIGMS IN WARFARE

As a result of six decades of changes in the international political and legal environment, conventional wars between nation states have become rare occurrences. Armed conflict within the borders of the nation state has become the dominant form of warfare. Asymmetry characterizes these internal wars: the goals, resources

¹ See for example NATO's *Strategic Concept*, the *European Union's Security Strategy and Internal Security Strategy*, or the *national security strategies of Great Britain and Hungary*.

and forces of the belligerents cannot be measured by the same yardstick. The state commands vastly superior resources, but partly due to the adversary's nature and tactics, and partly due to changes in the international political climate it is unable to exploit its superiority. The enemy is really more of an *adversary* or an *opponent* rather than an *enemy*: he is a non-state actor, usually a citizen of the state and a member of the society whose cohesion he is trying to disrupt. Maneuvering on the borderlines of parliamentary democracy, street politics, armed conflict and common crime, he claims the legal protections guaranteed to politicians, activists, combatants and criminals, but rejects all responsibility that is normally attached to these categories. Relying on propaganda, mass-mobilization techniques and intimidation, he creates a mass support base – or the appearance of one. He avoids confrontation with the armed forces and police and goes directly for the state's social foundations – the support of the civilian population. The battlefield is the society itself. Battles take place in the presence of civilians, against civilians or in the defense of civilians and civilian institutions, with the voluntary or forced participation of civilians. The civilian may be a target, a human shield, a source of information and resources, or a belligerent – and often it is difficult to decide which role he is playing at any given moment.

None of this is new – but, until recently, such challenges to the authority of the state were relatively easily handled internal problems. What is new is the dominant role insurgency has assumed: in the past 65 years, 80 to 85 percent of armed conflicts have been wars of national liberation, internal ethnic and religious conflicts, revolutions, counterrevolutions – or some combinations of these (Strachan, 2007). A new paradigm of warfare is emerging, in which modern war's conventional methods (the operations of mechanized brigades, divisions and corps) and weapons (tanks, artillery, high-performance aircraft) are generally useless, and the state's regular forces are often impotent. Rupert Smith calls the new paradigm "*war amongst the people*." (Smith, R. 2005, pp. 3-9)

In the right conditions, instigating or supporting such "wars amongst the people" can also serve state interests. By creating and sponsoring Hezbollah, Iran has acquired far more influence in the Eastern Mediterranean basin than it could have achieved through diplomacy or the deployment of its conventional forces. Pakistan has lost several wars against India, but what it has failed to gain by force of arms (integration of the state of Jammu and Kashmir into Pakistan), it has partially achieved by sponsoring non-state belligerents: it has acquired two thirds of the state and has prevented the remainder's integration into India.

The detailed analysis of the economic, social and political roots of this change is beyond the scope of this study, but the proximate cause is quite clear: the *erosion of the nation state's sovereignty*. By signing the UN Charter and by acceding to various international organizations the nation-state forfeits not only its right to advance its interests by force, but also its right to govern its own affairs as its people (or more accurately its political elite) see fit: monetary and trade policies, criminal justice,

labor relations, border security, family affairs – all are subject to intense and often hostile scrutiny by international organizations, non-governmental organizations, the media, and the governments of other states. In a relatively new development, the state has also lost its freedom to apply force within its own borders to defend itself against internal enemies. As Yugoslavia's government learned to its cost in 1999, the new international doctrine of "Responsibility to Protect" (R2P) allows even armed intervention in a state's internal conflicts, if a few influential powers convince the "international community" that the government's use of force against its internal enemies is excessive. And as the more recent example of Libya shows, once an international mandate is given, it can be gradually expanded to achieve just about any outcome the intervening powers desire.

The lesson of Yugoslavia and Libya is clear: the current international climate puts hardly any restraints on the rebels, but allows the government to apply only restrained, limited force in handling insurgencies.² To be effective, this limited force requires doctrines, tactics, training and equipment that differ radically from those of conventional war. But even more important, it demands a fundamentally different mindset from the elite that exercises political control, from the intellectuals that influence society's opinions, from the commanders of the security forces, and from the people.

But since the dangers of conventional war have not disappeared completely, a nation must retain sufficient capability to face them as well – therefore the state's asymmetric warfare capabilities must be additional to, rather than alternative to, its conventional military capabilities. Thus, *two paradigms of warfare exist side by side*, and they have very little in common. This may cause some severe headaches to those charged with developing national security strategies: only the largest states can afford to maintain separate armed forces to deal with an internal conflict.³ In other states the security forces must be prepared to handle national security threats according to either paradigm - or even according to both at the same time, if necessary. Britain's experience in Northern Ireland is instructive. The usual tour of duty for a Regular Army battalion in Northern Ireland was four and a half months, but for nearly a year the battalion was not available for conventional operations: it required three months of counterinsurgency training before deployment, and on completion of its tour it required a nearly identical period for retraining to recover its conventional warfighting skills, as well as block leaves, schools and other administrative procedures. (*Operation Banner*, 2006. p. 7-2)

The *parallel paradigms also exist in intelligence*. Whatever the asymmetric challenge, traditional intelligence work must continue. The intentions and capabilities of potential enemies and (although this is seldom mentioned in polite company)

² *The successful suppression the Tamil Tiger insurgency in Sri Lanka by the full power of the armed forces between 2007 and 2009 is a rare outlier.*

³ *Several successor states of the Soviet Union also maintain Internal Security Troops. Italy, France and some other nations maintain gendarmerie forces that can be deployed to handle an insurgency. India fields several hundred paramilitary battalions to maintain internal security – but occasionally even this large force must be augmented by regular army units and locally raised militias.*

those of friends and allies must be tracked. Counterintelligence must continue, in order to protect the nation's vital secrets. The intelligence capabilities that address the asymmetric threat must be additional to, not alternatives to, those earmarked for external intelligence and counterintelligence.

When tasked with counterinsurgency collection, the intelligence specialist must first determine who the *target of collection* is. In most cases the answer is politically so uncomfortable as to be difficult to acknowledge in public: the most likely adversaries are fellow citizens – voters and taxpayers, acquaintances, friends, brothers. This immediately raises legal obstacles. Observing a citizen's movements, tapping his telephone, listening to his conversations, reading his mail are limited by law in most countries. And they are illegal, if their foundation is a police profile consisting of ethnic or religious background, grooming habits and sartorial appearance, internet-surfing habits and choice of news sources – behaviors which suggest that sometime in the undeterminable future the citizen may perhaps pose a so far undefined threat to society.

Political correctness and excessive respect for civil liberties sometimes do pave the way for successful blows at the targeted society. The preparations for the terrorist attack on New York's World Trade Center attracted suspicion, but legal (and political) constraints prevented timely action. Many more examples can be cited for the opposite: when human and civil rights are seriously violated due to mere suspicion or malicious denunciation – or for being in the wrong place at the wrong time. Thus, the conditions of asymmetric warfare pose a serious dilemma not only for the political elite, but for all society: the *correct balance* between individual rights, citizens' responsibilities, national security, privacy and civil liberties must be found. The squaring of this circle is particularly important, because without such social consensus it is difficult to beat a non-state adversary.

2 CENTRAL VS. LOCAL INTELLIGENCE

Once some kind of social consensus is achieved (and it will only be "some kind of:" imperfect and full of contradictions), the next problem is that national-level intelligence organizations are not very useful against non-state adversaries. The legal foundation of their activities, their resources, tasks and doctrines, as well as the training of their personnel are all optimized to satisfy the information requirements of national level decision-makers, support the defense of the nation against external attack, and safeguard vital national security information. Consequently, hardly any of the intelligence services' resources will be useful in a "war amongst the people:" the adversary becomes part of the local community to remain hidden, obtain resources and information, and mount his operations.⁴ If an internal intelligence network does exist, the insurgents usually destroy it at the beginning of an in-

⁴ *As the Indian police discovered during the Khalistani insurgency in the Punjab (1980-1994), even the most important terrorists were operating with an 15 to 20 km radius of their hometowns – in area which were familiar to them in every detail. (Gill, 2001).*

surgency, and the security forces will be blind and deaf in the crucial, initial period of the conflict. In a worst case scenario the authorities may not even realize for a while that they no longer have an internal intelligence network.⁵ A further serious problem is that intelligence cycle is too slow: the information is long out of date by the time the consumer receives it through the usual channels.

Intelligence targets, essential elements of information, collection methods, analysis methodology – they are also all different. "Order of battle" is not a useful category when the insurgents are part of a self-organizing network with a constantly changing structure. "Doctrine" is meaningless when tactics, techniques and procedures (TTPs)⁶ – are copy-pasted from ideas downloaded from the internet, military manuals, action movies and propaganda videos. "Discipline" and "morale" are hard enough to evaluate in the context of regular forces; they are impossible to determine in the case of armed volunteer groups that form to execute a single operation and then disband. Logistics, supply, recruitment, training mean much the same thing for a 20 000-man regular force and for a mass army of two million, but they mean something entirely different for an urban guerrilla network consisting of a few dozen 10-man teams.

Since the adversary is hiding among the people, the security forces must make every effort to identify him *as an individual*, locate him and neutralize him without causing harm to civilians in the process. They needed every detail on the personal lives of the leaders and the membership of the various armed groups, the local informants, the liaison personnel between the groups, and the people operating the support networks. They must discover the insurgents' procedures for population control and identify the people exercising that control. They have to discover the arms smuggling routes, the relationships and communications channels between the clandestine armed groups and the legal political organizations, and a thousand other details. (Gill, 2001)

Only a ***locally focused intelligence organization*** can provide such extremely detailed information. It is best to base the organization on the local police service. Policemen are a permanent presence among the people; they are familiar with local conditions and customs; they maintain personal contacts in the local communities – not only with political leaders and bureaucrats, but also with the owners and staff of shops, restaurants, gas stations and garages, as well as with the local vagrants and petty criminals. These are elements of a local intelligence network which only needs focus, coordination – and funds. In addition to such ready-made networks,

⁵ This occurred in Rhodesia in 1970-71. The Zimbabwe African National Union (ZANU – one of the liberation movements) established an extensive underground infrastructure in Rhodesia's eastern provinces and at the same time systematically liquidated the informants of the government's intelligence services. The Rhodesian intelligence services failed to notice that their sources were going silent one after the other, and as there were no adverse (or any other) reports coming from the area, the government assumed that its security arrangements there were satisfactory – until ZANU commenced operations in 1972. (Cilliers, 1985, p. 220).

⁶ TTPs is a useful abbreviation coined by the US uniformed services: "Principles alone are not enough to guide operations. Tactics, techniques, and procedures provide additional detail and more specific guidance, based on evolving knowledge and experience. (...) **Tactics** is the employment and ordered arrangement of forces in relation to each other. (...) **Techniques** are nonprescriptive ways or methods used to perform missions, functions, or tasks. (...) **Procedures** are standard, detailed steps that prescribe how to perform specific tasks." FM 3-0 Operations, pp. D-1-D-2.

policemen have another advantage: they have both the authority and the skills to make deals with potential informants. They can promise protection and leniency in exchange for useful information, or they can threaten with the full majesty of the law if a source refuses to cooperate. Intelligence officers generally have neither such authority, nor such experience.

Without doubt, eventually military intelligence specialists can also learn these police techniques - and they may have to, if the police have to be supplemented by military forces. But at least in the early days of the conflict there is no choice but to rely on the police.

3 LINES OF INTELLIGENCE OPERATIONS

The Clausewitzian question of what is *the nature of the conflict* we are about to engage in must be answered in a counterinsurgency no less than in a conventional war. Insurgencies seldom develop without substantial (and well-founded) grievances, and a thorough – and unvarnished – understanding of its root causes and its social, political, economic and cultural and international dimensions is a must. Intelligence plays a crucial supporting role in acquiring this understanding. Even the directly affected national government can get this wrong, if intelligence is faulty – or if the decision makers find its conclusions unpalatable. For example the Rhodesian government persisted in treating the liberation movements as communist terrorists, and ignored their broad international and tribal appeal, until it was too late. As the Coalition's initial assessment of the insurgency in Iraq has shown, an expeditionary force is even more prone to make such mistakes.

It was a relatively easy task 40-60 years ago to *determine the insurgents' real goals* – the Hukbalahap in the Philippines, the Greek communists and Castro's bearded revolutionaries intended to seize the power of the state. Today insurgents may have less easily identifiable intentions. Some extreme Islamist organizations seem to have no interest in wielding the power of the state – they only want to force society to follow the path they consider righteous. For Latin-American drug cartels a weak state that enforces only the laws the cartels approve of is more advantageous than to seize and wield state power. Under the umbrella of a weak state they can produce and sell drugs without undertaking every burdensome detail of governance. Thus, one important intelligence task is identifying the enemy's true goals and tracking such changes as may occur in them.

Support of the population is the insurgent's source of legitimacy, his recruiting base, his main source of intelligence and one of his sources of funding; by mingling with the people he finds sanctuary from the state's oppressive military superiority. For the state, a key element of success is to isolate the insurgent from the population; therefore one of the fundamental tasks of intelligence is to *identify the supporting structures and the key links between the insurgents and the people*. These links are more than just interpersonal ties between relatives, friends, business associates or

ideological comrades, or channels to overt mass organizations that advocate the insurgents' cause in the political marketplace. Ideology and the meta-narrative that the non-state actor uses to persuade the people and the international audience, and the services he provides in return for the civilians' support also fall in this category – as do the acts and omissions of the political elite that may have caused the grievances at the root of the insurgency.

Modern non-state belligerents use the decentralized, self-organizing network as an organizational model. Networks are almost impossible to destroy, because they have no ideological, political or doctrinal center that could be attacked. Even after the greatest defeats and the greatest losses a few nodes will remain, which, given time, regenerate the network and reestablish insurgent control of the people. At best the security forces can disrupt the network to such an extent that it cannot function. To do that, *the network must be mapped*; its key nodes (individuals who provide ideological guidance, those with connections to sympathizers among the security forces and to foreign sponsors, others with such special skills as bomb-makers or computer experts, yet others who serve as liaison between two networks) must be identified.

The nature, goals and tactics of the adversary make it difficult, if not impossible, to reach the political compromises that are essential in ending armed conflicts. In most cases there is nobody to negotiate with: networks have no center, no leadership body or individual leader who could make a decision that is binding for every member of the organization. Even if a partner can be found, there is no guarantee that those who were not consulted would accept an agreement. On the contrary: an agreement may lead to die-hard elements doubling their anti-government efforts and turning on the "traitors of the people" at the same time. If the political elite cannot accept that there are no partners to negotiate with, then it becomes an intelligence task to *identify decision makers in the adversary organization who may be turned into partners* – and who may be made strong enough to enforce the conditions of an agreement within their organization.

For non-state actors – even though their operations are far less costly than those of conventional forces – *money* is a constant problem, because the sources of their funds are so uncertain. Their most generous donors may suddenly switch to a rival organization; the economic situation may change; banks may implement new security systems that cannot be circumvented. The insurgents' accounting may be no more certain than their sources: they can easily lose their funds to incompetence or embezzlement.⁷

Early insurgent movements levied "taxes" or "contributions" on the local peasants, laborers and merchants. Today the non-state actor takes advantage of cheap, fast and unobstructed travel to seek alternative sources of funding all over the world. This way he is not embarrassed, if the government finds a way to cut off one source. The

⁷ This is exactly what happened to the Malayan Communist Party: its secretary-general (Lai Tek) was a British agent; when his comrades began to suspect him, he disappeared with the party's treasury. (Barber, 1971, p. 32)

Irish Northern Aid Committee (Noraid) was one such alternative source of funding for the IRA; it collected donations in the United States, until the Justice Department (at the behest of the UK Government) began to pay closer attention to its activities. The Tamil Tigers invested in the business ventures of the Tamil diaspora. In 2002 their investments earned US\$50-60 million in profits. (Glenn, 2002) Criminal activity, particularly the highly profitable drug trade is another alternative revenue source. Radical Muslim organizations often receive generous state subsidies (from Pakistani, Saudi or Iranian sources) and donations from wealthy private donors. A finance expert may be able to follow the state funds, but the private donations often move in cash-filled suitcases, or through the informal African and Asian money transfer system (*hawala*), instead of regular banking channels; to track them the skills of an intelligence specialist (or a reformed smuggler) are more useful.

A counterinsurgency effort is likely to fail without successful combat operations. However important a "political solution" may be, nothing compels insurgent organization to compromise as long as it can generate forces at a rate that exceeds losses. And nothing compels the individual insurgent to give up, unless he knows that hunter-killer teams are after him personally. Furthermore, to a certain extent, insurgency is a dangerous form of competitive theater, in which the belligerents perform to obtain the support of the domestic and international public. One convincing way for the state to obtain the audience's support is a steady stream of battlefield successes. The security forces must prove that they can provide security by regularly producing dead and captured insurgents, discovering weapons caches and bomb factories and disrupting insurgent operations. This requires detailed, reliable and up-to-date (preferably real-time) *actionable intelligence*. Battlefield success requires far greater detail than knowing the organization, plans, intentions, tactics and support structures of the adversary. Names, location, habits, virtues and vices of individuals; names and addresses of their relatives, friends, girlfriends and/or boyfriends; current location, numbers and armament of insurgent teams; their route, speed, destination and means of travel, if they are on the move – the information must be sufficiently detailed, accurate and current to allow strikes without collateral damage to civilian property, and above all without casualties among the civilian population.

External support is vital for non-state belligerents. (To the author's knowledge the only modern insurgency to succeed without significant external support was Castro's revolution in Cuba.) Obtaining weapons and training forces is much simpler with the active support, or at least the benevolent tolerance, of a neighboring state. Exhausted forces can be rested beyond the borders, out of reach of the security forces; funds can be collected without interference, and the leadership can confer in safety, and its members can posture as statesmen in exile. An important intelligence task is to *uncover the external ties, identify the methods used to avoid border control measures*, and identify the individuals (particularly the government employees) participating in them.

4 HUMAN INTELLIGENCE – THE KEY DISCIPLINE

The "war amongst the people" nature of insurgency requires "intelligence from the people". Human intelligence (HUMINT) is the most important intelligence discipline. The best, most reliable sources of information are long-term *undercover intelligence officers*, who infiltrate the target organization or its immediate support structures and social environment. Depending on the nature of the insurgent organization, this may be a difficult (or impossible) task. Language, ethnicity or religion may pose insurmountable obstacles. Radical Muslim organizations are notoriously difficult to penetrate: non-Muslim intelligence specialists rarely have the knowledge and behavioral patterns to pass themselves off as adherents, while Muslim officers often refuse to target their co-religionists – or worse, side with them in the course of an investigation.

Informants are an entirely different proposition. There are many reasons, from avarice through fear to the desire to avenge a personal insult, for a person to inform on his associates. The security officer just has to discover the right "buttons" to push in order to encourage an individual's cooperation. By applying the right combination of incentive and coercive measures they can reinforce the motivators for cooperation and suppress those for loyalty to the adversary. They have many incentives at their disposal: they can offer money or help with securing employment; they can help legalize an irregular immigrant's status; they can reduce charges or forego prosecution for minor offenses. They have just as many coercive measures available: they can threaten to break up a family by deporting those members who are in the country illegally; they can threaten vigorous prosecution for minor violations of the law; they can threaten to leak information to the insurgents about the source's valuable service.

Interrogating captured insurgents promises significant gains: they have the most authentic and most up-to-date information on their own organization, and if they can be made to talk shortly after capture, they may divulge immediately actionable information. However, in author's experience as a HUMINT specialist is that an unwilling source cannot be persuaded to divulge information, unless some form of pressure is applied. The challenge for the intelligence specialist is to apply coercive measures (as well as some incentives), and at the same time remain within the confines of the laws and service regulations. This requires highly skilled professionals. The omnipresent (and often hostile) media poses an additional problem. "Coercive measures" and "pressure" are not the same thing as "torture." Nevertheless, even if no physical pain or discomfort is inflicted, the media are quick to brand pressure techniques as such.

If the circumstances of capture allow it (e.g. the prisoner is the only survivor of an insurgent team), no effort must be spared to turn him and feed him back into his organization as a double agent. If that is not possible, Plan B is to recruit him to fight on the government's side. This is usually not as difficult as one would think. Commitment to the cause or to the ideology of the movement is a less important

factor in the motivation of most insurgents than it is generally assumed. (Molnar, 1965) The hardships and physical demands of a life on the run, the stress of constant readiness soon drain the enthusiasm of even the most ardent volunteer. A substantial monetary reward, care for the family, a reasonably secure future once the insurgency is over – these are powerful magnets. The most potent coercive factor that complements these incentives is the majesty of the law – certain prosecution and probable serious punishment if one refuses to cooperate – is enough for many captured insurgents. Others may guide security forces onto their erstwhile comrades in the hope of eliminating all witnesses to their involvement in the insurgency. This is very delicate work. Recruiting and running double agents and informants requires highly skilled, disciplined, patient case officers: the insurgents are not forgiving towards traitors, and the slightest mistake may lead to the loss of a valuable source.

A very valuable information source is the *local civilian population*: they know the area, they know the troublemakers and hotheads, and they can identify new faces. Furthermore, since the insurgents hide among the people, the civilians usually know them and know their habits and movements. However, they will divulge their information only if security forces gain their trust. The best – perhaps the only – way to achieve this is by isolating the civilian population from, and providing it long-term protection against, the insurgents. Once reliable protection is in place, and the locals are convinced that it will last, information will begin to pour in – especially if rewards are also offered. (Smith, N. and MacFarland, 2008, and Gill, 2001)

Patrols may obtain actionable intelligence as they interact with the civilians, but even if they do not, they are invaluable for getting the "feel" of a place and noting changes in the mood and behavior of the locals. *Locally raised militias*, once properly trained in patrolling and observation techniques, can be invaluable: they know their area intimately, and anything out of place will immediately catch their attention. The patrol's information is valuable only if it is obtained in a timely manner, preferably immediately after the patrol's return to base, when the impressions are still fresh, even before the patrol members had a chance to eat or clean up.

Checkpoints, if they are set up with an isolated and screened area where civilians who pass through are interviewed one by one (and without witnesses) can be a significant intelligence asset. It is a fairly safe and innocuous place for the intelligence specialist to meet his informants without arousing suspicion, to meet locals face to face and obtain such information as they may be willing to divulge, and to recruit new informants.

Another mass intelligence source, the *interrogation of people arrested en masse in riots or in security sweeps* is generally far less useful. The information thus obtained is often incorrect, or deliberately misleading, due to the detainees' resentment for their treatment or to their outright sympathy for the insurgents.

5 INFORMATION TECHNOLOGY – THE POTENTIAL FORCE MULTIPLIER

Human information sources are of primary importance in counterinsurgency, but *technical means*, especially the latest advances in information technology (IT), also play a role. Modern electronic systems can record face-to-face and telephone conversations; they can monitor e-mail streams and automatically flag messages with suspicious content; they allow surveillance from a great distance. Processing the scenes of earlier attacks (location, type of target, access and egress routes, assembly areas, hiding places) in a geo-information system may identify likely future attack locations. Network analysis programs can identify critical nodes, whose destruction would disrupt the network. Combining the firepower of military forces with IT (particularly if collateral damage is not a significant concern) can yield significant results – for example the Chechen president Djokhar Dudayev was killed by a Russian missile that homed in on the signal of his mobile telephone.

One of the pillars of the intelligence effort must be a data processing system that can access local and national private and government data bases and can supplement them with data obtained from the local informant networks. In Europe's highly developed bureaucratic states the databases already exist, they only have to be harnessed. In the less developed areas of Asia and Africa they have to be created and populated with data – a major undertaking, but well worth the effort, because a combination of IT and population control measures (ID card scheme, security patrols, checkpoints) can take the place of the physical control measures (curfews, protected villages and free fire zones) used in the past.

A well-designed data system can digest and compare data stored in widely differing formats, uncovers anomalies and helps in locating and apprehending insurgents and their supporters. It can flag suspicious behavior (frequent cash transactions in a generally cash-less society); it can identify unusually structured households (e.g. those with an unusually large number of young males); it can pick out names that appear in one list, but are absent from other, closely related lists (e.g. residential addresses and public utilities customers), or appear on mutually exclusive lists (e.g. a cell-phone conversation and a credit-card transaction at the same time by the same person, in widely distant locations); it can identify citizens who are long dead and buried, yet drive cars and visit dentists, etc.

In the counterinsurgency context such forensic data-mining is far more than just an intrusive investigative procedure of over-zealous law enforcement officials looking for suspects in a crime already committed. Its purpose is to identify potential insurgents, with a view to neutralizing them before they can strike. This is *preemptive profiling* based on racial, ethnic or religious stereotypes, personal habits and behavior patterns, therefore anathema to advocates of privacy and human rights.⁸ However,

⁸ In 2003 Congress scuttled a very ambitious data-mining project of the United States government (*Total Information Awareness*), but similar projects are either in development, or are already functioning. The FBI has also been the target of criticism recently for its permissive domestic surveillance rules.

the fact remains, that most insurgents do fit definable profiles. And, conversely, most citizens fit one of the "most likely not an insurgent" profiles (little old ladies in tennis shoes). A thorough inspection of the first category and a quick screening of the second makes life more difficult for insurgents and frees up resources that can then be focused on identifying the rare outliers – the attractive Belgian redhead with the suicide vest, the university professor who doubles as ideological enabler and recruiter.

6 ACTIVE MEASURES AND SECURITY

Passive intelligence collection must be supplemented by *active measures*, directed against the insurgents' organization, support structures and cohesion. In "wars amongst the people" most actionable intelligence is extremely perishable: the non-state belligerent has nothing or very little by way of permanent structures and assets, and he can abandon whatever he has without seriously degrading his capabilities.⁹ Creating an *intelligence-action service* that integrates intelligence specialists and small strike forces of police or light infantry can overcome this problem: the intelligence specialists collect the information, evaluate it immediately and pass it to the strike elements to act on it, well before the target realizes that he has been compromised. (Trinquier, p. 37.) Such forces have been used by the French in Algeria, especially in Algiers, with some success. (Aussaresses, pp. 117-121) However, there are two risks in employing intelligence-action teams. First, even with the best data-communications systems, the team's evaluation capabilities are likely to be limited. As a result, it may target the strike element on the basis of raw or only partially evaluated information. Second, such forces, unless they are very tightly controlled, often become rouge organizations and inflict far more damage to the government's cause than whatever benefits they can provide.

Strike teams organized from security forces personnel and masquerading as insurgents or their supporters can be particularly effective in sowing dissent, mistrust, suspicion and enmity among the insurgents' ranks, between insurgents and civilians, and insurgents and their international supporters. They can also eliminate the insurgency's emblematic figures who may feel safe among their own people – especially on the far side of an international border. In the English-speaking world these are generally called "pseudo-operations."¹⁰ The key to the success of such operations is the participation of *captured and turned insurgents* both in training the teams and in the operations themselves. (Cline, 2005, Mahadevan, 2007 and Kiss, 2010)

The conditions of modern insurgency offer many opportunities for pseudo-operations: the meta-narrative at the core of the insurgency seldom provides sufficient

⁹ For example the Algerian independence movement fighting against French rule (FLN – Front de Libération Nationale) instructed its members to hold out for 24 hours under interrogation. After that they were free to divulge any information they had – by then their associates would disappear, weapons caches would be emptied, safe house would be vacated.

¹⁰ A recent, spectacularly successful pseudo-operation was Operación Jaque (July 2, 2008). Colombian soldiers, masquerading as employees of a non-governmental organization rescued 15 hostages held by Colombian rebels.

discipline and cohesion; an ambiguous rumor and a few suspicious incidents are enough for insurgent groups to start accusing each other of treachery and start fighting among themselves. Modern insurgencies, due to their heterogeneous ethnic composition and constantly changing, leaderless network organization, cannot develop effective counterintelligence screening measures that would identify such impostors and uncover their activities in a timely manner.

Effective intelligence must go hand in hand with *effective counterintelligence*. The insurgents will do everything in their power to penetrate the security forces, and their efforts are often successful. A disconcerting experience of western security forces is that loyalty to Islam overwrites other loyalties, even if they were undertaken voluntarily, and under oath: there have been a number of cases of Muslim personnel supplying the targeted organizations with information. Some other religions have a similar effect. During the Sikh insurgency in the Punjab many police officers sympathized with the insurgents and provided them with information. In this instance the police showed rare pragmatism: the suspicious officers were discreetly reassigned to positions where they had no access to sensitive information. Thus the insurgents not only lost valuable sources – they were also deprived of the propaganda value of the arrest and trial of policemen who had "answered the call of their conscience." (Gill, 2001) Compartmentalization, strict adherence to the principle of need-to-know (which can be detrimental to the quality of intelligence) and tight control and supervision may reduce this risk, but will never eliminate it completely.

7 HOW DOES IT ALL AFFECT WESTERN FORCES?

One conclusion we can draw from the preceding pages is that – at least in the area of asymmetric conflict – the customary division of intelligence work into collection areas (foreign-domestic; military-civilian, economic-technical-scientific, land-air-maritime, etc) has to be given up. This does not mean that every intelligence and counterintelligence organization must be amalgamated into a single unit - but it definitely does mean that the "intelligence community" must lower the dividing walls between disciplines, collection areas and collector agencies, and it must achieve a very high order of coordination. There must also be very close cooperation with the intelligence organizations of other nations.

The Punjab Police's intelligence operations during the years of the Khalistani insurgency are particularly instructive. In the early years of the insurgency no systematic intelligence collection took place – even routine record-keeping was neglected. A dedicated, multisource counterinsurgency intelligence operation was set up only in 1984 – four years into the conflict. Officers from all the law-enforcement, paramilitary and military organizations were brought together, and given the task to carry out a detailed analysis of insurgent operations throughout the state. The most important sources of the intelligence "raw material" were:

- the periodic reports from the network of local police stations,
- the detailed documentation of every terrorist incident,

- the interrogation of captured insurgents and individuals who operated the insurgency's supporting infrastructure;
- technical means (voice intercept, remote surveillance),
- double agents in the insurgent organization,
- informants recruited among the population.

Gradually, patterns emerged from the apparent uniformity of terrorist operations across the state. The various insurgent organizations, their leadership and their main operatives were identified, their strength determined, their spheres of operation defined, their relationships of cooperation and hostility with other organizations documented. Detailed information was also gathered on sources and flows of weapon supplies, networks of safe-houses, shelter-providers and sympathizers, cross-border routes. Joint interrogation centers, a system of dissemination of information and liaison officers posted to operations centers and command posts solved the problem of intelligence sharing between the various organizations.

Rapid analysis of raw data and dissemination of the results meant actionable intelligence, planning based on near real-time information, and operations targeting specific organizations and individuals. The operations could be executed with surgical precision – which meant operations that affected only the insurgents, without "collateral damage." The key result was that the initiative passed to the security forces.

The insurgents retained the capacity to organise unpredictable and entirely random strikes against soft targets, but they lost the impunity of operations that they had previously enjoyed. Following each major strike, the responsible organization was targeted not only in the Punjab, but in their safe-houses all over the country. The detailed information available of their possible escape routes – including shelters with the extended families of each terrorist, extended families of terrorists who had been killed in the past, key sympathisers and harbourers – made it possible to mount surveillance and concerted pursuit operations that, even where they did not result in immediate arrest, paralysed individual terrorists and prominent groups, reducing their capacity to act in future.

There is no question that western military personnel can master the intelligence techniques and procedures most appropriate for a counterinsurgency campaign. They have proven this in many counterinsurgency campaigns, in several continents: the elimination of Saddam Hussein's sons, the capture of the dictator himself, the capture or liquidation of insurgent leaders in Colombia were no accidents. However, if we are serious about gaining and retaining the trust and support of the people, we must apply these principles not only to hunt down a limited number of high-value targets, but across the board. That requires familiarity with the social, political, economic and cultural environment and a thorough understanding of the conflict's root causes – and not only among intelligence specialists. Personnel with these qualifications are likely to be in short supply, especially when they would do most good – in the early phases of the insurgency. This is a serious challenge, because without such

understanding there is a risk of concentrating on those discrete parts of the conflict that we do understand well (e.g. finding, fixing and fighting the enemy), and neglecting other aspects that are equally important. (Flynn, Pottinger, and Batchelor, 2010) During the last three years or so the author conducted several command post exercises in Eastern Europe. When faced with the unfamiliar problem of a domestic insurgency scenario, the participants usually tried to fit the expeditionary experience they had gained in Iraq or Afghanistan to a domestic situation, and hoped that the umpire would not challenge them on rules of engagement or the provisions of the penal code. Those with no expeditionary experience usually fell back on the tactics, techniques and procedures (TTPs) of conventional war. Even senior police officers - supposedly trained in handling domestic disturbances - were not better prepared. There is no reason to suppose that American, German or Danish officers would behave differently if - or when? - U.S., German or Danish forces have to be deployed within the United States, Germany or Denmark in support of civilian law enforcement agencies. This is no problem as long as the troops provide only logistics, communications or medical assistance. But if - or (again) when? - they have to take a more active role, they would have to face the reality of fighting fellow citizens, friends, brothers under rules of engagement that are far more restrictive than anything they have experienced overseas. Unless they are provided with appropriate doctrinal guidance (and appropriate training) ahead of time, they are also likely to fall back on TTPs that worked in conventional war or in the counterinsurgency campaigns in Iraq or Afghanistan, but are totally inappropriate for a conflict on their own soil. The time to develop and promulgate those doctrines is now - before they are needed, rather than the day after the troops are deployed.

8 ASYMMETRIC WARFARE IN EUROPE

It is a comfortable self-delusion (as well as political irresponsibility) to see the likelihood of asymmetric challenges only in the failed states of the third world, or in the remote, backward regions of the Balkan Peninsula. The factors that bring about the paradigm shift are present in Europe as well. The reduced authority of the nation states in the European Union, closed and corruption-prone political elites, the dominance of corrosive ideologies (moral and cultural relativism, multiculturalism, political correctness) have created a fertile soil for the growth of local asymmetric challengers. Kosovo's independence motivates other minorities to seek their own autonomy or independence. In several European states, we must take into consideration the aspirations of increasingly assertive and violent Muslim minorities.¹¹ Furthermore, as the solution to a long-running economic crisis seems more and more remote, old-fashioned class-struggle may appear again, especially in Eastern Europe. As a result of the coincidence of external and internal factors, asymmetric conflict is probable in the near future. In some states *de facto* autonomous zones have

¹¹ *The minorities in question naturally consider their aspirations for greater autonomy or full independence entirely justified and legitimate, and may even have the sympathy and support of the rest of the world. However, for the affected state they are usually a national security threat, which the government usually feels compelled to answer (by force, if necessary) in order to preserve the state's territorial integrity.*

developed: no-go zones not only for the majority population, but often also for public service employees, law enforcement officers, public transportation and ambulances. The zones are governed by local power centers that collect taxes, dispense justice according to their own code, and if necessary coerce the loyalty of the zone's residents.

Terrorism has proven to be one of the most effective instruments of the insurgents, consequently every intelligence organization in the world has been concentrating on identifying terrorist organizations and preventing their operations. Special units are standing by in every country to parry terrorist attacks or deal with their consequences. Police organizations – if they receive appropriate instructions from the political decision makers – are able to suppress street riots and possess every tool necessary for the destruction of alternative power centers. Extensive literature is available in most languages, and some armed forces have long institutional experience in this area. Minorities that are unable to (or refuse to) assimilate and obsessively insist on their traditions are routine tasks for the social infrastructure of most states. Thus, within the narrow limits of their own expertise, these institutions are able to handle particular aspects of asymmetric conflict.

However, if the interdependence and synergies between the various elements is not clear for the political decision makers, then they will not recognize the need for a state of emergency. If there is no state of emergency, then the organizations and institutions of the state machinery will work without coordination, in isolation from one another and, working at cross purposes, will neutralize each other's results (Kiss, 2006).

The most important task of the intelligence organizations is to support the political decision makers with up to date, accurate information. A hardly less important task is to monitor the actual political and security situation, identify potential threats, and call the decision makers' attention to them. When discharging the latter task they may have to accept the role of the mythological Cassandra. Whether the decision makers take the warnings seriously or not, the intelligence organizations must prepare for expected crises, at least with plans and capabilities. In the case of asymmetric threats this preparation is overdue today.

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TEŽAVEN POLOŽAJ VODNIKA: TEHTANJE MED OBČUTKOM PRIPADNOSTI IN SOCIALNO KOHEZIJO V MIROVNI OPERACIJI

THE TROUBLED POSITION OF A SERGEANT: MEDIATING BETWEEN ESPRIT DE CORPS AND SOCIAL COHESION IN A PEACE OPERATION

Povzetek Članek se osredotoča na opazanja danskega vodnika in njegov boj z dvema osrednjima dejavnikoma vojaškega vedenja - občutkom pripadnosti in socialno kohezijo v mirovni operaciji. Na podlagi terenske študije je predstavljeno in analizirano večje število opazanj iz različnih situacij, v katerih se je vodnik srečal z občutkom pripadnosti ali socialno kohezijo. Opazovanja so pokazala, da sta občutek pripadnosti in socialna kohezija osrednja dejavnika tako v tej konkretni operaciji kot v vojnih operacijah. Opazovanja so pokazala tudi, da je zaradi utečenih samodejnih procesov, ki zahtevajo osebni stik in prevzemanje vlog, danski vodnik imel težave s svojo bojno skupino. Druga opazovanja kažejo, da je občutek pripadnosti v tej konkretni mirovni operaciji bolj v žarišču in da del vojakov zaradi svojih interpretacij delovanja v neformalni hierarhiji zavzema drugačno mesto. Različne interpretacije povzročajo konflikte v danski bojni skupini in vodnik jih težko obvladuje.

Ključne besede *Občutek pripadnosti, socialna kohezija, vodnik, bojna skupina, mirovna operacija, danski kontingent Kforja.*

Abstract This article focuses on the observation of a Danish Sergeant in a peace operation and his struggle with two central factors of military behavior, esprit de corps and social cohesion. Based on a field study, several observations from different situations where the Sergeant is facing either esprit de corps or social cohesion are presented and analyzed. The observations show that, both, esprit de corps and social cohesion are central factors in this specific peace operation, as in war operations. Observations also show that due to leadership based on routinized tacit face-to-face and role-taking processes the Danish Sergeant has difficulties with his combat group. Other observations show that esprit de corps in this specific peace operation is more in focus and part of the soldiers' interpretation of operations positions them differently in the informal hierarchy. The production of different interpretations causes conflicts in the Danish combat group, which the Sergeant has difficulties handling.

Key words *Esprit de corps, social cohesion, Sergeant, combat group, peace operation, Danish KFOR.*

Cohesion in peace operations

This article primarily discusses the observations of a Danish Sergeant and, secondly, the two central social factors of the military, esprit de corps and social cohesion, with which the Sergeant seems to struggle. Both factors are well researched and point to the Sergeant's general role as the mediator between the military institution and the combat group in situations of war (Caforio, 2006, p.15).

Despite the fact that there are close to one million peacekeepers worldwide, little is known about esprit de corps and social cohesion in peacekeeping (Mouthaan, 2005, p. 103). Consequently, this article will, instead of presenting military behavior in a war operation, focus on the behavior of a Danish Sergeant in a peace operation to see if (and if so, how) the Esprit de Corps and Social cohesion change with the type of operation. The attempt is also to see whether, in this specific peace operation, the Sergeant has retained his usual functions, and if so, how these functions are carried out in this peace operation.

Introduction In order to understand soldiers' motives to fight, much interest of military sociology has centered on the social origins of the military, due to the assumption that such information could explain and predict soldiers' behaviour and capacities.

One focus has received special attention, and that is combat stress. This has been the case, because research into combat stress has revealed several other central factors (- as for instance social cohesion and the related question: under what circumstances and when does a combat group break up and lose its ability to fight or function as a whole? -) which are also relevant when we want to understand soldiers' motives and behavior, also in peace operations. To illustrate, even if peace operations are generally not comparable with combat operations, the shared deployment experience, and the unchanged emphasis on group formation and social bonding during military service and deployment lead to the belief that a 'band of brothers' is forged among peacekeeping soldiers similar to war operations (Mouthaan, 2005, p. 103). This shared social bonding in both war operations and peace operations makes it conceivable that they also share stressors as well as other factors. Although deployments to peace operations seem to have stressors in common with combat deployments, the general approach of a peace operation mission is based on a constabulary model, and, consequently, it differs from war operations in its fundamental approach and expectations. As a consequence, deployment in peace operations strains soldiers differently by combining a potentially threatening situation with the task of self-control. The tension inherent in this balance between soldiers' aggressive or retaliatory impulses and forced non-reaction is reflected in the term, the *UN soldier stress syndrome* (Adler, 2005, p. 121).

1 MILITARY STRESS, ESPRIT DE CORPS AND SOCIAL COHESION

During the First World War, doctrine held that soldiers were motivated to fight by ideology and moral; i.e. by esprit de corps. In this understanding combat stress such as 'shell shock' was rejected and called 'cowardice', and stressed soldiers who stopped fighting were often shot (Birenbaum, 1994, p. 1484).

Later, during Second World War the doctrine from the First World War that men fought for moral reasons such as patriotism, esprit de corps, pride and leadership changed in favor of small-group psychology.

In a situation where more than 16 million Americans went through service during World War II, Samuel A. Stouffer and his research team conducted more than 200 studies, including 600,000 interviews with personnel, both, on the home front and in operations abroad. Stouffer's research team identified the combat situation to be an extreme condition in which nearly all an individual's needs are denied satisfaction; the threats concern the vital facets of the person, life and physical integrity, fundamental conflicts are created in values; individuality is nullified; and anxiety, pain, fear, uncertainty, and powerlessness triumph. The hostility against the soldier's self could not be more profound. However, flight, desertion, psychological breakdown, suicide, etc. from a combat situation show that this is relatively rare. Therefore, Stouffer's research team concluded that there were two factors which compensated the stress factors and made the soldier remain in line. According to Stouffer, the two central factors were the primary group and group cohesion. For Stouffer, it is the group that guarantees the psychological survival of an individual in combat. Still, the group could let its members out of the stress situation without changing the cohesive values if it abandoned the combat situation as a whole. From this observation, Stouffer concluded that an external factor prohibited the group from deserting. The research group identified this factor in a system of interiorized norms, accompanied by a system of domination applied by the military. In short, the primary group is brought to fight for itself in order to save its existence and position within the military institutional system, whereby it adheres to the values of the military institutional system, which it has incorporated into its own informal codes (Stouffer, vol. I & II, 1949).

Shils and Janowitz in their analysis of cohesion in the German army during World War II, based in part on primary group theory, provided a set of factors for the measurement of military cohesion. Shils's and Janowitz's research pointed to the importance of the cohesion of primary groups and to the fact that any intervention of the military institution that could act as a disaggregating factor should be avoided. The most important aspect of the primary group was the defence of its cohesion, which has been reached through the roles that the group distributed to its individual members: One crucial role was that of the 'natural' leader, who had to mediate between the combat group and the military institution. The operational consequence was the preparation of the Sergeant to become the combat group's natural leader.

The Sergeant is able to undertake the natural leadership of the group if he is able to recognize and respect the informal code. In order to do that he has to be a member of the group and fully share its combat situation. At the same time, he has to be a representative of military hierarchy (Shils & Janowitz, 1948, p. 280-315).

The post-World War II period saw an explosion of small group research. Almost every variable and combination of variables was examined. In this research process, the definition of cohesion, motivation and combat stress came to include multiple concepts and factors which divide cohesion into a horizontal *social* cohesion and a vertical *task* cohesion.

As a consequence, the research of the sociology of the military differed between one group focusing on ‘esprit de corps’, which is the soldiers’ vertical identification with the military institution and organization (discourse about operation’s objective) and the other focusing on ‘cohesion’, which is the soldiers’ horizontal identification with the small primary group to which they belong- behavior, tacit knowledge and brotherhood (Siebold, 1999). As a result, two schools were formed as regards the understanding of military behavior: one pointing at esprit de corps as the central factor and one pointing at social cohesion as the central factor (See: Wong, 2006; MacCoun, 2006). Studies of the vertical identification with the military institution tend to use rational studies of the survey type, whereas studies of the horizontal identifications tend to use direct observations of the field studies. Both esprit de corps and social cohesion are, however, being associated with combat effectiveness and the prediction of soldiers’ behavior during battle.

In effect, it was the Sergeant who functioned as a mediator between the discursive objectives of the military institution and the habituated and tacit behavior of the combat group. This position, then, is also a crucial pivoting point between the vertical esprit de corps of the military institution and the horizontal social cohesion of the combat group.

2 METHOD

This article presents the observations of the early phase of the NATO KFOR operation, which included a Danish KFOR contingent. A Danish Sergeant was one of the observed people.

The study used the method of grounded theory (Glaser, 1992). The reason for choosing this approach was that *no* field studies up to that point had ever been carried out in the Danish military. Consequently, there were no empirically grounded Danish concepts or theories to be tested. They had to be developed. Naturally, this placed the research task “at one end of the continuum of abstraction in sociological work.” (Glaser, 1994, p. 235)

The grounded theory approaches focus on *how* to understand ‘thick’ qualitative data and how the different concepts in the field interact. If we turn to Barney Glaser, he

writes the following about grounded theory: “In grounded theory, one does not think up hypotheses and then test them. That is the verificational methodology. In grounded theory the analyst induces patterns of relationships suggested by data, and they emerge with theoretical codes to relate them. The analyst then writes these integrated hypotheses into a grounded theory, knowing that a few of the most relevant could be tested later on in a verificational study.” (Glaser, 1992, p. 84)

Also, in order to be ‘open’ to the observation of new or undiscovered concepts and interactions, the grounded theory method is *not* to be influenced by old concepts and research. Again, in the words of Glaser, the researcher must try “to analyze what is going on and how to conceptualize it, while suspending one’s knowledge for the time being. The researcher starts finding out what is going on, conceptualizes it and generates hypotheses as relations between the concepts.” (Glaser, 1998, p. 95) Glaser advises, indeed, *not* to read field-related theories when doing grounded theory: “An effective strategy is, at first, literally to ignore the literature of theory and fact on the area under study, in order to assure that the emergence of categories will not be contaminated by concepts more suited to different areas.” (Glaser & Strauss, 1967, p. 37)

Observations were carried out in different organizational situations: at observation posts and check points; in a platoon on alert, at mobile check points; patrols; and in company and battalion briefings.

Those observed in the whole field study were a Private First Class, a Sergeant, a First Lieutenant, a Major and a Colonel. They had all been observed for a week, and after that interviewed individually. The observations and interviews were repeated three times, as the field was observed in three different periods of time during the deployment.

These 5 soldiers were selected to create a representative cross section of the organization in terms of purpose, agency, position, function, organization, leadership and institution (n=5). Supplemental interviews were carried out with 21 (n=21) of the 130 infantry KFOR soldiers, total n=26. These interviews were added as a consequence of the situations and of recommendations. The interviews were all of the open-ended variety.

In addition to interviews, data was obtained from participant observations and from official documents collected in the field. The field observations were written down or recorded. Sound recordings cover approximately 200 hours. Photographs were taken, and material from a range of different battalions’ home pages downloaded.

The study may be criticised for not being supported by enough data and cause suggestions to go back and collect more data. It should be noted that at the end of each operation the Danish Battalion ceases to exist. Thus, it is not possible to go back for more data.

To sum up, this article presents a grounded theory field study focusing on *how* to understand a small number of Danish soldiers in a specific peace operation, KFOR, in the beginning of the operation, and what concepts these soldiers developed and how these concepts interacted. As a consequence of the grounded theory approach only an outline of Esprit de Corps and Social Cohesion have been presented as the dynamics of the operational context in which the Danish Sergeant operated. Focus, however, remained on the different practices of the soldiers, in this case the Sergeant, and his combat group. Also, while the concepts of for instance Swedish or Slovenian soldiers might be interesting, they must be kept out of the observation of Danish soldiers and introduced only later in comparative or verification studies.

2.1 Consent in a conflict zone

Institutional Consent. Before the field study started, both the Danish Defense Command and the Danish Defense Academy received the description of the research project. Both the object of study and the freedom of the researcher to use the research method which suited the object were accepted. So a general institutional consent was obtained.

Interviewer's Consent. The soldiers were asked if they wanted to participate in the interviews, and were told that it was an absolutely free choice. Their expressed consent was obtained and recorded in the beginning of each interview.

Combat Group Consent. Back in Denmark and prior to the deployment, all the soldiers had been informed in advance that they were being subject to research and that this was the reason for my presence. In many situations, the consent was only implied, which means that it was not expressly granted by every single soldier or the combat group, but that they accepted that I was openly interviewing them, writing down observations, and participating in their everyday life and operations.

Public Consent. Other situations were of a more public character: actions at a check points, morning drills, common meals, briefings etc. Such open situations were considered public and open, not only by this researcher but also by others, such as journalists.

2.2 Results

A variety of grounded excerpts will be presented showing the representative situations in which the Sergeant was central. It is a two-tier presentation, which first presents the situation, which is in itself a theoretical and methodological choice, and then the analysis.

2.3 Morning briefing

The following case is one of several examples of leadership situations experienced in the beginning of the tour. The case is taken from a daily morning briefing and the Major is talking about an incident in a little village of Zubin Potok:

- Major:* "...so it was around 50-70 meters away from where we were standing therefore it was . But it began with an Albanian national..eh..song and then..TMK carried out a small .parade .there and this, as you know, already gives a signal eh . seeing both that TMK had 100 men there that is, as you know, relatively many, .and it is interpreted as the first step in the direction of raising a pro-Albanian profile .what could this develop into . there has been some talk of an abbreviation KNA – and that is simply Kosovo National Army and that . as we know . they are not allowed to according to resolution 1244 . You do remember that .1244 .that is . don't You . now what is that . Come on, what is it? ... (the Major is snapping his fingers rapidly and whistling as you would whistle for a dog, prompting it to move faster) . Laursen!
- Laursen:* well, that is the resolution eh which we are down here to enforce which holds some sub items.
- Major:* Yes??! Who has passed this resolution? Is it something NATO passed?
- Someone:* UN (in a low voice)
- Major:* *BE QUIET! PUT ONESHAND UP IF ONE KNOWS THE ANSWER!!*
Who has passed it, Laursen?
- Laursen:* UN has
- Major:* Who in UN, What is U- UN, that is getting off too cheaply.....
- Laursen:* But isn't it that council that is assembled .
- Major:* Yes, what is the name of that council?
- Laursen:* I bloody don't remember...
- Major:* Try looking up here
- Someone:* are you sure
- Major:* Be Quiet!!!
- Major:* UNSCR??!(snapping his fingers) We have been through this many times in Knowledge-of-service [part of the training], Laursen, if you can't remember then you will fucking have to write it down, this is important stuff. And you, 3.4? which council was it? (snapping his fingers) when you listen to – that is, if you watch a little more news and a little less Baywatch then you will hear this around every other day ... (snapping his fingers) It is the UN Security Council! ..(snapping his fingers) The UN Security Council! That is in fact the only agency in this world that can authorize war, as we have mentioned, and this resolution 1244 which has been passed by the UN Security Council, what is it about? What is it about 3.5?
- 3.5: that among other things we shall unarm UCK
- Major:* Yes, correct
- 3.5: eh uphold freedom of movement
- Major:* Correct!

Before this briefing, during the morning drill, the Sergeant, *Laursen*, is placed and drilled as a collective 'body', a part of the platoon, and here he receives the collective information and orders. Likewise, he is performing the same bodily movements

as the first privates. Later, however, he is taking part in the briefing of the company. This participation gives him a role as an individual subject. The Sergeant seems to be situated in a situation characterized by mutual exclusive relations and positions. He tries to be a part and not to be a part at the same time. Sergeants are not members of the combat group of privates nor are they a part of the leader group. Still, they are ordered to participate daily in the platoon briefings. It is observed that the only time the Sergeants participate in the morning briefing, is when they are asked to give report. This is typically given in practical descriptions of where they were, what they did – not *why* they chose to do what they did. The rest of the time, they just listen. During these briefings the Sergeants were observed to perform poorly, not being able to answer even basic questions. The Sergeants did not have separate briefings or meetings from which they could build a frame of reference and an independent Sergeant's identity.

Most of the time, it is the Major who does the talking; then it is the Captain; then the Lieutenants and almost never the Sergeants. This is the general structure of communication in the company. And generally, the officers talk about their decisions as an "I" decision, but when they address the platoons they use the collective "we", "you" or "one". The platoon is a collective "we" while the Lieutenant is an individual "I".

If we turn to the briefing: The bodily language of the Major conveys a message of irritation and impatience. This is communicated by his restless movements in front of all lower-rank officers and Sergeants. Most of the time, he is snapping his fingers. During his lecture, the Major shifts from the Sergeants to one of the officers. Here he gets the right answer and thus gives the officer a status position, as one with the correct answer and a higher position.

It is probably the conflicting positions of the Sergeant, which give him a hard time answering. First, the morning drill is habituating him to be part of a tacit collective and commanded bodily "we", next he has to change from this 'we' position to a reflective "I" position. This observation is further expanded in the next case.

2.4 Communicating a position

In the following case, a second-in-command Sergeant (NK) of the 3rd platoon talks to the observed Sergeant (Sgt.) at a Delta 2-6; the gunner 1 also interferes in the conversation:

- NK: then I need to see your 'Junior Woodchucks Guidebook' and your signal orders .
- Gunner 1: and a signal order . I'd really like one .
- NK: but you don't get that – I was told – it's not for all – only for you – [the Sergeant is looking for his books] ..I must *see* that you've got it – physically see it – and you do alright – that's nice All: thank you..
- Sgt: didn't some of the others have it?

- NK: then you must maintain minimum crew .there are 10 men out here . and the rest you must send in .. to the camp
- Sgt: okay ..
- NK: for 'KONURO' equipment [riot equipment] ...
- Sgt: what .are they allowed to drive in
- NK: 1 Piranha ..ehh ..but it must be like this that when you are standing down there now . the Piranha stands down here . and when you stand down there then it is down there .. you'll have to coordinate that yourself ..
- Sgt: yes ... we've broken open the locks on my ..we have to figure out that too [NK looks very resigned] yes . but .what were we to do .. really?
- NK: I don't know .
- Sgt: then you bloody got to get out here with some keys .and the ones you got you obviously can't find . so then it was ..
- NK: no but the .the..
- Sgt: it doesn't matter .now .they are broken . so now..
- NK: yes yes ..but it's four padlocks . with the same key ... that's the problem
- Sgt: yes but what can we do?
- NK: I don't know
- Sgt: alright .all you can do is to give me an earful

This conversation is dominated by short key phrases, in which the verbs are held in imperative, in commands from the NK and short questions from the Sergeant. The sentences refer to tasks and are very detailed. NK's sentences are dominated by instructions and rules. There are no personal utterances. Personal demarcations take the form of swearing and facial expressions, in bodily demarcations, which cannot be read out of the text, but are visible, especially with the Sergeant. The two persons, a senior Sergeant and the Sergeant, are talking to each other without using "I", "you" or "he" in singular. Instead they use the plural form of the pronoun "you".

Language objectifies mutual human experiences and makes them understandable to everybody in a linguistic collective (Berger and Luckmann, 1966, p. 86f). Likewise, military language is transformed into an accessible place for the depositing of military meaning and experience, which can be stored over time and then transferred to future military generations. As a system of signs with a specific 'logic', military language forces the individual into its patterns. Military language thus transforms specific experience into general types such as being a Sergeant (Berger and Luckmann, 1966, p. 91).

The language of these two Sergeants is divided into organizational hierarchical dialects with vocabularies that refer to specific and delineated forms of action. The senior Sergeant is addressing the Sergeant without pronouns. Verbs used to describe tasks are mostly kept in passive voice with no agent, or in the short imperative form. The discourse (of esprit de corps) at one and the same time exclude the Sergeant's private reflective "I", emphasize the correct habituation (behavior) of the Sergeant's role (morning drill) and still expect the Sergeant to be able to reflectively participate in the briefings.

2.5 Organizational separation

The military organization is divided by hierarchy, function and rank; by secrecy, information and knowledge; by power and influence; and by symbols, rituals, traditions and norms. (Finer, 1962, p. 7f; Roslyng-Jensen, 1980, p. 19)

In Denmark, the enlisted men are instantly, at the beginning of military service, separated into different hierarchical, functional and commanding positions as privates, Sergeants and officers and sent off to schools with different geographical places and differences in terms of training and socialization.

During the first interview with the Sergeant, he spoke about his experience with this organization's separation between the rank and file and the officer group. In his words:

Q: and relating to your superiors ..how do you expect that the development will be .. that you will have a better social relation to them or ..

Sgt.: I don't think so ..damn I don't think so .. really we eh .. we get along .. to a certain level .. and then of course there are . this thing . officers and Sergeants separately . and KC [the Major] does much of that .. to him its

...

Q: yes?

Sgt.: I don't know..

Q: so you are separated?

Sgt.: yeah a bit

Q: why?

Sgt.: mmm I don't know ..he just does .. really the officers .. or the o-group as they are called right .. and us .. we mind ourselves a bit .

Institutions always have a history of which they are products. For the military, this history is closely intertwined with the history of State, Power and People. As such, the history of the military institution constitutes the objectified culture to which the enlisted soldier has to relate. As an objectified deposition of knowledge, institutional "memory" of old wars, former technologies, and former socializations of privates and officers as deep military-institutional codes, are carried in traditions, rituals and routines.

This objectified deposition of knowledge positions Sergeants in their specific identity and role. Sergeants' identity is learned in different schools than that of the officers, but it is also prepared by and rests within civil society at large ((Berger and Luckmann, 1966: 86). This physical and mental separation was partly maintained in Kosovo.

2.6 Socializing privates

During the study, a development of a close familiarity within the combat group was observed. This was also expressed by the Sergeant during the interview in which he talked about his primary-like upbringing of the privates:

- Sgt.: what the hell does it then do .really..then one don't get that . culture shock . there are *really* many to whom it is good to get away from his mom .. I came to feel that myself .that one has to shine your boots yourself .
- Q: what do you mean by culture shock?
- Sgt.: what can I say .when one gets in and then suddenly all your rights are taken away .
- Q: yes?
- Sgt.: they don't decide a damn thing [for themselves] the first long time when they are in the military .
- Q: that's a culture shock?
- Sgt.: yes I think so .yes .
- Q: yes?
- Sgt.: where you before .then you could do what you liked . now you have to ask permission to go to the toilet . right .say Sir . and .there's somebody who decides when you are to get up and decides when to go to bed . you are really deprived a lot of .. rights .
- Q: what's good about that?
- Sgt.: really . I think that you eh . I think at least I myself have got another insight into myself.

In this interview, the Sergeant links 'mom', 'bed' and 'toilet' to 'Sir' and 'deprived rights'. Apparently, the Sergeant is in a position where he has to connect the heterogeneous internal life of the combat group with the external homogenous esprit de corps of the military institution.

The internal behavior and conversation was observed to consist of diffuse acts and a conversation between the privates, going back and forth between own doings and external tasks. The conversations were characterized by two distinct directions: an "upward" direction radiating the individual micro level *feelings* of the private trying to confirm, support, and continually recreate perceived structures, and the person's "downward" direction which comprise the shaping forces that do not originate in the individual (Franks, in Reynolds, 2003, p. 794). The privates thus related to each other as both "persons" and as "individuals". The distinction is important in understanding both the social cohesion and the socialization process as the "downward" role-taking of the *persons* is characterized by the organizational statuses the privates hold and the roles they play. Thus, while members of the combat group related to each other horizontally as *individual* family members, they were also extremely aware of the vertical role each *role person* played in the combat group and outside of it in the battalion in general.

This way, the privates' interactions generated a *classical* combat group with its brotherhood. The conception of combat group was “publicly” displayed and recognized by the battalion and other soldiers in the drill as in other acts. As seen from the inside of the combat group, this primary group seemed to form a loose composition of family-like relations between the privates. As seen from the outside, the private was part of a military structure, definitions, directives and orders that were defined from above by the organization to meet certain tasks.

The combat group became objectified through both internalizing and externalizing interaction with other soldiers and, over time, part of what is meant by a ‘combat group as a basic institution of the military (Caforio, 2006, p. 64). In this process, the Sergeant was the central mediator when he was present; this was, however, not always the case.

2.7 Operational objective, conflict and cohesion

During the deployment, the combat group had growing internal conflicts and a mediation meeting in the combat group in which they were asked to hear each other out was observed. The mediation had been decided by the Lieutenant and not by the Sergeant.

Some of the problems were the heated temper of the Sergeant, a penalty given to one of the first privates for sleeping on duty and the constant grumbling and laziness by a certain private. After the mediation, the combat group was deployed in an operation close to the Albanian border while the Sergeant was on leave, leaving leadership of the combat group to the gunner 1. After these incidents, the following situation was observed: The combat group is to search through fields and the sides of a mountain for weapons. It is early in the morning and the Piranha has just unloaded the soldiers:

Sgt.: .did you bring enough water along?

Me: mmm . I've got 1½ liters along...

(...)

Sgt.: Well .we deploy along the fence and then we proceed forward and then the aqueduct . we probably have to cross it somehow so . let's do it

Harder: yeah .then let's do it!

The privates form a long line and start to move forward at the same time as they search the area:

Sgt.: Now get up in that line so that we can report when you are ready

Harder: Or what? It might be.. It's just because..

TK 3.1!![Sgt.]

Sgt.: YES!!..

TK what are we to do here .. ?

Sgt.: Try to keep the distance .we are only going up to the aqueduct there

Slowly the group moves up the mountainside:

TK: Is it one of the mountain tops we are headed for?
Larsen: We just follow the first
Sgt.: When we reach the top of that one .then we walk eh . over there . and
then we walk back again ... and downwards . (lower voice to himself) no
. perhaps that's too stupid . we'll have to see . ARE WE READY??
Line yes yea yeah yes...

One hour has passed without finding anything and we sit down to drink some water:

Sgt.: yes .now we'll walk over there and then we'll head downwards again ..
and the we'll spend really a whole lot of time on the houses down there
because then we don't have to come up here again
JK: oh that's my man
TK: but what..?
MM: are they not all that we are lacking or what...?
Sgt.: yes it is ..but really . what is it . it . I think it's a bit strange that we must
.go so far into the area
Gunner1 yeah right .but really it's laying down in that direction .. you are to lazy to
get up there again..
Sgt.: no the last .the last situation reports are first of all that they found three
uniforms . an ABC-mask . a west . a steelhelmet and .. and eh a raincoat..

The privates are clearly tired and express detachment to the over-all objective of the operation. However, the 'gunner 1' criticizes the group for being lazy. The conversation goes on until the Sergeant pulls himself together:

Sgt.: Well! Folks..!!
Harder: then we are to have 5 more minutes..
MM: you said ½ an hour more!?
All: (get up) aaahuoooohgnnnnhhpffftttt .. etc. (laughs)

It is observed that the Sergeant speaks from the collective "we" position and not the commanding "I". It almost seems as if he is the 'alter ego' of the combat group when he says: "we walk along the fence!" and ends the sentence with a: "then let's do it!" In the first excerpt one of the privates asks what he is supposed to do, and the Sergeant answers back with an instruction to keep the distance in the line. So, the private is asking for meaning and the Sergeant is instructing the bodily behaviour. The internal conflicts in the combat group become evident in the 'gunner 1', who wants to become an officer, when he calls the other privates lazy. It seems as if he is already talking from the future position of an officer and from here addressing the subordinate private's lazy body. The Sergeant answers him from the vertical task cohesion, the institution and the esprit de corps. The chat is illustrative of the relations and the cohesion of the combat group. The resistance of the privates is

being interpreted as laziness by gunner 1, while the soldiers on their side are constantly asking for the reasons and logic of operations. The privates' remarks are often followed by cursing which expresses frustrations regarding leadership.

At this point, the combat group has broken into different fractions, pivoting around different persons, episodes and interpretations of the objective of the operation. The three fractions consist of the group referring to the Sergeant. This is the group which follows the formal organization. The next group is the one referring to gunner 1, who represents the officers' 'war' interpretation, and the last group is the one referring to the first private, TK, who represents an 'it's absurd' interpretation.

Conclusion In combat of war, horizontal social cohesion is mainly fear-driven and perhaps defensive. The combat group is fighting enemies in trying to survive and to defend something it takes for granted: a nation-state, a culture or a local community. This fighting takes place on habituated ground, so to say, with routinized and tacit actions. In a peace operation situation, however, agency is not routinized and tacit-driven, but is formulated in a logical global political discourse about security. In this discourse the tasks of the soldiers are formulated so as to try to establish security, to mediate conflicts and build trust among the local population. As a result, the discursive political objective of the deployment is brought more into focus in peace operations. This means that the discourse was exercised at a level where it was actually confronted with tacit military practices. This confrontation seemed to create the processes of securitization at the lowest levels of the military institution. (Wæver, 1997; 2004; 2010, p. 650)

In this specific case, these processes caused the development of not just one informal code in the combat group, but two. During deployment, the group had one formal leader, the Sergeant, and developed two informal competing codes, gunner1 and TK. All three positions interpreted the objective of the deployment as well as the specific operations differently. This process of interpretation of the esprit de corps was observed to cause conflicts in the combat group and to disturb the social cohesion. From these specific observations it is suggested that, in this peace operation, the balance between esprit de corps and social cohesion is leaning more towards esprit de corps. The competing interpretations of the objective of the deployment brings the leadership of the Sergeant in a new and vulnerable position, because his maintenance of the social cohesion of the combat group is in many respects based on habituated practices which originate from war operations and does not support the discourse of his leadership in a peace operation.

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Avtorji

Authors



Igor Kotnik

Dr. Igor Kotnik je magistriral (1994) in doktoriral (2000) na Katedri za obramboslovje, FDV. Vojaško znanje in izkušnje je pridobil kot slušatelj in inštruktor v ŠROP Bileća (1985–1986), poveljnik voda v JOd TO (1987–1991) ter rezervni častnik S-1 v 24. OKMB (1992–2000). Od leta 2000 je bil v dveh mandatih svetovalec ministra za obrambo in namestnik generalnega direktorja za obrambno politiko. V letih 2010-2011 je končal RCDS v Londonu. Trenutno je svetovalec načelnika GŠSV za obrambno in vojaško politiko.

Igor Kotnik, PhD, *obtained his master's degree (1994) and PhD (2000) at the Faculty of Social Sciences. He acquired military knowledge and experience as a student and instructor in Infantry Officer School in Bileća (1985-1986), platoon commander in the Territorial Defence Assault Detachment (1987-1991) and S-1 reserve officer in the 24th Armoured Mechanised Battalion (1992-2000). Since 2000, he has been Advisor to the Minister of Defence during two tenures and Deputy Director of the Defence Policy Directorate. In 2010-2011, he graduated from RCDS, London. Currently, he works as Defence and Military POLAD to the Chief of the SAF General Staff.*



Georgios Protopapas

Georgios Protopapas je znanstveni sodelavec in medijski analitik na Raziskovalnem inštitutu za evropske in ameriške študije (RIEAS) v Atenah. Diplomiral je iz evropskih študij na univerzi v Hertfordshiru v Veliki Britaniji in podiplomski študij nadaljeval na univerzi v Kentu. Od leta 2000 ureja mednarodno diplomatsko in obrambno rubriko grškega političnega in finančnega tednika Investor. Pri raziskovanju ga zanimajo mednarodna javna diplomacija, geopolitika, terorizem in energija.

Georgios Protopapas *is a Research Associate and Media Analyst at the Research Institute of European and American Studies (RIEAS) in Athens, Greece. He obtained his bachelor's degree in European Studies at the University of Hertfordshire (UK) and pursued postgraduate studies in International Relations at the University of Kent (UK). Since 2000, he has edited international diplomacy and defence section in the Greek weekly political and financial newspaper "Investor". His research interests include issues of international public diplomacy, geopolitics, terrorism and energy.*



Jerzy Stańczyk

Dr. Jerzy Stańczyk je doktoriral iz politologije in se specializiral za mednarodne odnose ter varnostna vprašanja. Trenutno je predstojnik oddelka za mednarodne odnose na Inštitutu za družbene vede in varnost na Univerzi za naravoslovne vede in humanistiko v Siedlcach na Poljskem. Je tudi član programskega sveta Raziskovalnega centra za interdisciplinarna varnostna vprašanja ter znanstvenega sveta družbenopolitične revije *Doctrine* na tej univerzi. Je član uredniškega sveta mednarodne publikacije *Journal of Security and Sustainability Issues*.

Jerzy Stańczyk, PhD, *obtained his doctoral degree in political sciences with specialization in international relations and security problems. Currently, he is the Head of the Department of International Relations at the Institute of Social Sciences and Security at the Siedlce University of Natural Sciences and Humanities, Poland and member of the Program Council of the Transdisciplinary Security Issues Research Center and of the Scientific Council of socio-political magazine "Doctrine" at this University. He is also member of the Editorial Board Council of the international "Journal of Security and Sustainability Issues".*



Gregor Garb

Mag. Gregor Garb je magistriral iz politologije z nalogo *Oblike tajnega delovanja obveščevalno-varnostnih služb Republike Slovenije* in iz logistike sistemov z nalogo *Varnostno upravljanje kritične infrastrukture*. V svoji karieri se je udeležil številnih izobraževanj in konferenc doma ter v tujini. Objavil je več vojaškostrokovnih člankov (obveščevalno-varnostna dejavnost, zoperstavljanje terorizmu, organizirani kriminal, kritična infrastruktura, nacionalna in mednarodna varnost). Zaposlen je kot major v Slovenski vojski.

Gregor Garb, MSc, *earned his master's degree in political sciences with the thesis *Forms of Secret Operation of Intelligence-Security Services of the Republic of Slovenia*, and in logistics of systems with the thesis *Security Management of Critical Infrastructure*. He has attended numerous education courses and conferences in Slovenia and abroad, and published several military professional articles (intelligence-security activity, counter-terrorism, organized crime, critical infrastructure, national and international security). He works in the Slovenian Armed Forces as a Major.*



Peter Álmos Kiss

Dr. Peter Álmos Kiss je upokojeni specialist za obveščevalno dejavnost kopenske vojske ZDA. Med hladno vojno in vojnami na Balkanu je služboval v eni izmed Natovih enot za strateško obveščevalno dejavnost. Deloval je tudi kot specialist za psihološko bojevanje, učitelj jezikov in inšpektor za nadzor nad oboroževanjem. Doktoriral je leta 2012 na Nacionalni univerzi za javni sektor v Budimpešti.

Peter Álmos Kiss, PhD, is a retired intelligence specialist of the US Army. He served in one of NATO's strategic intelligence units during the Cold War as well as the Balkan wars. He also served as psychological warfare specialist, language instructor and arms control inspector. He earned a PhD in 2012 at the National University of Public Service in Budapest, Hungary



Claus Kold

Dr. Claus Kold je bil med letoma 1997 in 2004 zaposlen na Inštitutu za vojaško voditeljstvo in organizacijo Kraljeve danske šole za obrambo. V tem obdobju je sodeloval tudi v operaciji Kforja. Danes deluje kot višji raziskovalec na Danskem inštitutu za preprečevanje mučenja (DIGNITY). Pri raziskovanju ga zanima predvsem vedenje vojakov v vojni in miru.

Claus Kold, PhD, worked in the Institute for Military Leadership and Organization of the Royal Danish Defense College Between 1997 and 2004. During this period, he was deployed to KFOR operation. Today, he is a senior researcher at the Danish Institute against Torture (DIGNITY). His research interests include soldiers' behaviour in war and peace operations.

Navodila avtorjem
za oblikovanje prispevkov

Instructions for the authors
of papers

NAVODILA AVTORJEM ZA OBLIKOVANJE PRISPEVKOV ZA SODOBNE VOJAŠKE IZZIVE IN VOJAŠKOŠOLSKI ZBORNIK

Vsebinska navodila

Splošno

Sodobni vojaški izzivi je interdisciplinarna znanstveno-strokovna publikacija, ki objavlja prispevke o aktualnih temah, raziskavah, znanstvenih in strokovnih razpravah, tehničnih ali družboslovnih analizah z varnostnega, obrambnega in vojaškega področja.

Vojaškošolski zbornik je vojaškostrokovna in informativna publikacija, namenjena izobraževanju in obveščanju o dosežkih ter izkušnjah na področju vojaškega izobraževanja, usposabljanja in izpopolnjevanja.

Kaj objavljamo?

Objavljamo prispevke v slovenskem jeziku s povzetki, prevedenimi v angleški jezik, in po odločitvi uredniškega odbora prispevke v angleškem jeziku s povzetki, prevedenimi v slovenski jezik.

Objavljamo prispevke, ki še niso bili objavljeni ali poslani v objavo drugi reviji. Pisec je odgovoren za vse morebitne kršitve avtorskih pravic. Če je bil prispevek že natisnjen drugje, poslan v objavo ali predstavljen na strokovni konferenci, naj to avtor sporočiti uredniku in pridobiti soglasje založnika (če je treba) ter navesti razloge za ponovno objavo.

Tehnična navodila

Omejitve dolžine prispevkov

Prispevki naj obsegajo 16 strani oziroma 30.000 znakov s presledki (avtorska pola), izjemoma najmanj 8 strani oziroma 15.000 znakov ali največ 24 strani oziroma 45.000 znakov.

Recenzije

Prispevki se recenzirajo. Recenzija je anonimna. Glede na oceno recenzentov uredniški odbor ali urednik prispevek sprejme, če je treba, zahteva popravke ali ga zavrne. Pripombe recenzentov avtor vnese v prispevek.

Zaradi anonimnega recenzentskega postopka je treba prvo stran in vsebino oblikovati tako, da identiteta avtorja ni prepoznavna.

Avtor ob naslovu prispevka napiše, v katero kategorijo po njegovem mnenju in glede na klasifikacijo v COBISS spada njegov prispevek. Klasifikacija je dostopna na spletni strani revije in pri odgovornem uredniku. Končno klasifikacijo določi uredniški odbor.

Lektoriranje

Lektoriranje besedil zagotavlja OE, pristojna za založniško dejavnost. Lektorirana besedila se avtorizirajo.

Prevajanje	Prevajanje besedil ali povzetkov zagotavlja OE, pristojna za prevajalsko dejavnost oziroma Šola za tuje jezike PDRIU.
Navajanje avtorjev prispevka	Navajanje avtorjev je skrajno zgoraj, levo poravnano. <i>Primer:</i> Ime 1 Priimek 1, Ime 2 Priimek 2 V opombi pod črto se za slovenske avtorje navede, iz katere ustanove prihajajo. Pri tujih avtorjih je treba navesti tudi ime države.
Naslov prispevka	Navedbi avtorjev sledi naslov prispevka. Črke v naslovu so velike 16 pik, natisnjene krepko, besedilo naslova pa poravnano na sredini.
Povzetek	Prispevku mora biti dodan povzetek, ki obsega največ 1200 znakov (20 vrstic). Povzetek naj na kratko opredeli temo prispevka, predvsem naj povzame rezultate in ugotovitve. Splošne ugotovitve in misli ne spadajo v povzetek, temveč v uvod.
Povzetek v angleščini	Avtorji morajo oddati tudi prevod povzetka v angleščino. Tudi za prevod povzetka velja omejitev do 1200 znakov (20 vrstic).
Ključne besede	Ključne besede (3-5, tudi v angleškem jeziku) naj bodo natisnjene krepko in z obojestransko poravnavo besedila.
Besedilo	Avtorji naj oddajo svoje prispevke na papirju formata A4, s presledkom med vrsticami 1,5 in velikostjo črk 12 pik Arial. Na zgornjem in spodnjem robu naj bo do besedila približno 3 cm, levi rob naj bo širok 2 cm, desni pa 4 cm. Na vsaki strani je tako približno 30 vrstic s približno 62 znaki. Besedilo naj bo obojestransko poravnano, brez umikov na začetku odstavka.
Kratka predstavitev avtorjev	Avtorji morajo pripraviti kratko predstavitev svojega strokovnega oziroma znanstvenega dela. Predstavitev naj ne presega 600 znakov (10 vrstic, 80 besed). Če je avtorjev več, se predstavi vsak posebej, čim bolj zgoščeno. Avtorji naj besedilo umestijo na konec prispevka po navedeni literaturi.
Strukturiranje besedila	Posamezna poglavja v besedilu naj bodo ločena s samostojnimi podnaslovi in ustrezno oštevilčena (členitev največ na 4 ravni). <i>Primer:</i> 1 Uvod 2 Naslov poglavja (1. raven) 2.1 Podnaslov (2. raven) 2.1.1 Podnaslov (3. raven) 2.1.1.1 Podnaslov (4. raven)

Oblikovanje seznama literature

V seznamu literature je treba po abecednem redu navesti le avtorje, na katere se sklicujete v prispevku, celotna oznaka vira pa mora biti skladna s harvardskim načinom navajanja. Če je avtorjev več, navedemo vse, kot so navedeni na izvirnem delu.

Primeri:

a) knjiga:

Priimek, ime (lahko začetnica imena), letnica. *Naslov dela*. Kraj: Založba.

Na primer: Ulrich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press.

b) zbornik:

Samson, C., 1970. Problems of information studies in history. V S. Stone, ur. *Humanities information research*. Sheffield: CRUS, 1980, str./pp. 44–68. Pri posameznih člankih v zbornikih na koncu posameznega vira navedemo strani, na katerih je članek, na primer:

c) članek v reviji

Kolega, N., 2006. Slovenian coast sea flood risk. *Acta geographica Slovenica*. 46-2, str. 143–167.

Navajanje virov z interneta

Vse reference se začenjajo enako kot pri natisnjenih virih, le da običajnemu delu sledi še podatek o tem, kje na internetu je bil dokument dobljen in kdaj. Podatek o tem, kdaj je bil dokument dobljen, je pomemben zaradi pogostega spreminjanja www okolja.

Ulrich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press, str. 45–100. <http://www.mors.si/index.php?id=213>, 17. 10. 2008.

Pri navajanju zanimivih internetnih naslovov v besedilu (ne gre za navajanje posebnega dokumenta) zadošča navedba naslova (<http://www.vpvs.uni-lj.si>). Posebna referenca na koncu besedila v tem primeru ni potrebna.

Sklicevanje na vire

Pri sklicevanju na vire med besedilom navedite le priimek prvega avtorja in letnico izdaje. *Primer:* ... (Smith, 1997) ...

Če dobesedno navajate del besedila, ga ustrezno označite z narekovaji, v oklepaju pa poleg avtorja in letnice navedite stran besedila, iz katerega ste navajali.

Primer: ... (Smith, 1997, str. 15) ...

Pri povzemanju drugega avtorja napišemo besedilo brez narekovajev, v oklepaju pa napišemo, da gre za povzeto besedilo. *Primer:* (po Smith, 1997, str. 15). Če avtorja navajamo v besedilu, v oklepaju navedemo samo letnico izida in stran (1997, str. 15).

**Slike,
diagrami
in tabele**

Slike, diagrami in tabele v prispevku naj bodo v posebej pripravljenih datotekah, ki omogočajo lektorske popravke. V besedilu mora biti jasno označeno mesto, kamor je treba vnesti sliko. Skupna dolžina prispevka ne sme preseči dane omejitve.

Če avtor iz tehničnih razlogov grafičnih dodatkov ne more oddati v elektronski obliki, je izjemoma sprejemljivo, da slike priloži besedilu. Avtor mora v tem primeru na zadnjo stran slike napisati zaporedno številko in naslov, v besedilu pa pustiti dovolj prostora zanjo. Prav tako mora biti besedilo opremljeno z naslovom in številčenjem slike. Diagrami se štejejo kot slike. Vse slike in tabele se številčijo. Številčenje poteka enotno in ni povezano s številčenjem poglavij. Naslov slike je naveden pod sliko, naslov tabele pa nad tabelo. Navadno je v besedilu navedeno vsaj eno sklicevanje na sliko ali tabelo. Sklic na sliko ali tabelo je: ... (slika 5) ... (tabela 2) ...

Primer slike:



Slika 5: Naslov slike

Primer tabele:

Tabela 2: Naslov tabele



**Opombe
pod črto**

Številčenje opomb pod črto je neodvisno od strukture besedila in se v vsakem prispevku začne s številko 1. Posebej opozarjamo avtorje, da so opombe pod črto namenjene pojasnjevanju misli, zapisanih v besedilu, in ne navajanju literature.

Kratice

Kratice naj bodo dodane v oklepaju, ko se okrajšana beseda prvič uporabi, zato posebnih seznamov kratic ne dodajamo. Za kratico ali izraz v angleškem jeziku napišemo najprej slovensko ustreznico, v oklepaju pa angleški izvirnik in morebitno angleško kratico.

**Format
zapisa
prispevka**

Uredniški odbor sprejema prispevke, napisane z urejevalnikom besedil MS Word, izjemoma tudi v besedilnem zapisu (text only).

**Naslov
avtorja**

Prispevkom naj bosta dodana avtorjeva naslov in internetni naslov ali telefonska številka, na katerih bo dosegljiv uredniškemu odboru.

**Kako poslati
prispevek**

Na naslov uredništva ali članov uredniškega odbora je treba poslati tiskano in elektronsko različico prispevka.

**Potrjevanje
sprejetja
prispevka**

Uredniški odbor avtorju pisno potrdi prejetje prispevka. Avtorjem, ki sporočijo tudi naslov svoje elektronske pošte, se potrditev pošlje po tej poti.

Korekture Avtor opravi korekture svojega prispevka v treh dneh.

**Naslov
uredniškega
odbora** Ministrstvo za obrambo
Generalštab Slovenske vojske
Sodobni vojaški izzivi
Uredniški odbor
Vojkova cesta 55
1000 Ljubljana
Slovenija
Elektronski naslov
Odgovorna urednica:
liliana.brozic@mors.si

Prispevkov, ki ne bodo urejeni skladno s tem navodilom, uredniški odbor ne bo sprejemal.

INSTRUCTIONS FOR THE AUTHORS OF PAPERS FOR THE CONTEMPORARY MILITARY CHALLENGES AND THE MILITARY EDUCATION JOURNAL

Content-related instructions

General

The Contemporary Military Challenges is an interdisciplinary scientific expert magazine, which publishes papers on current topics, researches, scientific and expert discussions, technical or social sciences analysis from the field of security, defence and the military..

The Military Education Journal is a military professional and informative publication intended for education and informing on achievements and experiences in the field of military education, training and improvement.

What do we publish?

We publish papers in Slovene with abstracts translated into English. If so decided by the Editorial Board, we also publish papers in English with abstracts translated into Slovene.

We publish papers, which have not been previously published or sent to another magazine for publication. The author is held responsible for all possible copyright violations. If the paper has already been printed elsewhere, sent for publication or presented at an expert conference, the author must notify the editor, obtain the publisher's consent (if necessary) and indicate the reasons for republishing.

Technical instructions

Limitations regarding the length of the papers

The papers should consist of 16 typewritten double-spaced pages or 30,000 characters. At a minimum they should have 8 pages or 15,000 characters and at a maximum 24 pages or 45,000 characters.

- Reviews** All papers are reviewed. The review is anonymous. With regard to the reviewer's assessment, the Editorial Board or the editor accepts the paper, demands modifications, if necessary, or rejects it. Upon receiving the reviewers' remarks, the author inserts them into the paper.
Due to an anonymous review process, the first page must be designed in the way that the author's identity cannot be recognized.
Next to the title, the author should indicate the category the paper belongs to according to him and according to the classification in the COBISS¹. The classification is available on the magazine's internet page and at the responsible editor. The Editorial Board determines the final classification.
- Proofreading** The organizational unit responsible for publishing provides the proofreading of the papers. The proofread papers have to be approved.
- Translating** The translation of the papers or abstracts is provided by the organizational unit competent for translation or the School of Foreign Languages, DDETC.
- Indicating the authors of the paper** The authors' name should be written in the upper left corner, aligned left.
Example:
Name 1 Surname 1,
Name 2 Surname 2,
In the footnote, Slovenian authors should indicate the institution they come from. Foreign authors should also indicate the name of the state they come from.
- Title of the paper** The title of the paper is written below the listed authors. The font in the title is bold, size 16 points. The text of the title is centrally aligned.
- Abstract** The paper should have an abstract of a maximum 1,200 characters (20 lines). The abstract should include a short presentation of the topic, particularly the results and the findings. General findings and reflections do not belong in the abstract, but rather in the introduction.
- Abstract in English** The authors must also submit the translation of the abstract into English. The translation of the abstract is likewise limited to a maximum of 1,200 characters (20 lines).
- Key words** Key words (3-5 also in the English language) should be bold with a justified text alignment.
- Text** The authors should submit their papers on an A4 paper format, with 1.5 line spacing, fontArial size 12 points. At the upper and the bottom edge, there should be approx. 3 cm of space; the left margin should be 2 cm wide and the right margin 4 cm. Each page consists of approx. 30 lines with 62 characters. The text should have a justified alignment, without indents at the beginning of the paragraphs.

¹ Co-operative Online Bibliographic System and Services

A brief presentation of the authors

The authors should prepare a brief presentation of their expert or scientific work. The presentation should not exceed 600 characters (10 lines, 80 words). If there are several authors, each should be presented individually, as shortly and as comprehensively as possible. These texts should be placed at the end of the paper, after the cited literature.

Text structuring

Individual chapters should be separated with independent subtitles and adequately numbered.

Example:

- 1 Introduction
- 2 Title of the chapter (1st level)
- 2.1 Subtitle (2nd level)
- 2.1.1 Subtitle (3rd level)
- 2.1.1.1 Subtitle (4th level)

Referencing

In the bibliography, only the authors of references one refers to in the paper should be listed, in the alphabetical order. The entire reference has to be in compliance with the Harvard citing style.

Example:

Surname, name (can also be the initial of the name), year. *Title of the work*. Place. Publishing House.

Example:

Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press.

With certain papers published in journals, the author should indicate, at the end of each reference, a page on which the paper can be found.

Example:

Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press. p. 45-100.

Referencing internet sources

All references start the same as the references for the printed sources, only that the usual part is followed by the information about the Internet page on which the document was found as well as the date on which it was found. The information about the time that the document was found on the Internet is important, because the WWW environment changes constantly.

Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press. p. 45-100. <http://www.mors.si/index.php?id=213>, 17 October 2008.

When referencing interesting WWW pages in the text (not citing an individual document) it is enough to state only the Internet address (<http://www.vpvs.uni-lj.si>). A separate reference at the end of the text is therefore not necessary.

Citing

When citing sources in the text, indicate only the surname of the author and the year of publication. *Example:* (Smith, 1997) ...

When making a direct reference to a text, the cited part should be adequately marked with quotation marks and followed by the exact page of the text which the citing is taken from.

Example: ...(Smith, 1997, p.15) ...

Figures, diagrams, tables

Figures, diagrams and tables in the paper should be prepared in separate files which allow for proofreading corrections. The place in the text where the picture should be inserted must be clearly indicated. The total length of the paper must not surpass the given limitation.

Should the author not be able to submit the graphical supplements in the electronic form due to technical reasons, it is exceptionally acceptable to enclose the figures to the text. In this case the author must write a sequence number and a title on the back of each picture and leave enough space in the text to include it. The text must likewise contain the title and the sequence number of the figure. Diagrams are considered figures.

All figures and tables are numbered. The numbering is not uniform and not linked with the numbering of the chapters. The title of the figure is stated beneath it and the title of the table is stated above it.

As a rule, the paper should include at least one reference to a figure or a table.. Reference to a figure or a table is: ... (Figure 5) (Table 2)

Example of a figure:

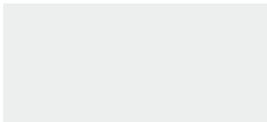


Figure 5: Title of the figure

Example of a table:

Table 2: Title of the table



Footnotes

The numbering of the footnotes is not related to the structure of the text and starts with number 1 in each paper. We want to stress that the aim of the footnotes is to explain the thoughts written in the text and not to reference literature.

Abbreviations

When used for the first time, the abbreviations in the text must be explained in parenthesis; therefore no additional list of abbreviations is needed. If the abbreviations or terms are written in English, the appropriate Slovenian term should be written along with the English original and possibly the English abbreviation in the parenthesis.

Format type of the paper

The Editorial Board accepts only the texts written with a MS Word text editor and only exceptionally those in the 'text only' format.

- Author's address** Each paper should include the author's address, e-mail or a telephone number, so that the Editorial Board can reach him or her.
- Sending the paper** A print or an electronic version of the paper should be sent to the address of the Editorial Board or the members of the Editorial Board.
- Confirmation of the reception of the paper** The Editorial Board sends the author a written confirmation regarding the reception of the paper. The authors who also list their e-mails receive the confirmation via e-mail.
- Corrections** The author makes corrections to the paper within three days.
- Editorial Board address** Ministry of Defence
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The Editorial Board will not accept papers, which will not be in compliance with the above instructions.

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