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*Mitja DURNIK**

HAS THE LIBERAL INTERNATIONALIST CONCEPTION OF THE EU'S FOREIGN POLICY MADE IT INCAPABLE OF ACTING IN INTERNATIONAL CONFLICTS?

Abstract. *Notions of the power associated with the European Union's foreign policy and its role in international relations are mostly liberal in origin. This explains the EU's special role in the Cold War era and that it has since emerged more as a moral, ethical and normative power. The EU's lack of military capability has probably been the main cause that prevents it from acting as a great or superpower. The distinction between materialistic and immaterial elements of power has been a crucial point of contention between realists and liberal thinkers. In international relations, we are also witnessing the trend of the EU increasingly using the geopolitical approach (such as in the Ukrainian crisis) besides the normative one. In the article, different concepts of EU foreign policy regarding power in the light of realism and liberalism are compared where, alongside the descriptive method, a SWOT analysis is performed.*
Keywords: *realism, liberalism, power, European Union, Ukraine, foreign policy, international relations*

Introduction

Realism and liberalism are two central traditions in Western socio-political thought that differ with respect to the issue of power. While realists view power as a core issue in international relations, liberals largely neglect power politics and possible power imbalances, basing their international relations agenda mainly on the principles, norms and defence of democratic values along with the role of international institutions. The EU's Common Foreign and Security Policy (CFSP) has primarily been influenced by liberal internationalism (and even constructivism) more than realism, which Mearsheimer (2014) believes would lead to some innovative solutions and understandings of the EU's new role in the international community.

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Realism has dominated power debates since the Second World War. Realists imagine power chiefly in terms of military capabilities, with the classification of states based on the notion of how many of these military resources a given state possesses. Some alternative conceptions of power (e.g., constructivism or postmodernism) have "dematerialized" realist conceptions of power in international relations (Berenskoetter, 2007). There is a distinction between possessing power resources and using them. Baldwin (2016: 69) refers to this as the "as the difference between intentions and capabilities". Davis Cross and Karolewski (2016) treat power as a relational phenomenon that is not necessarily always based on resources or material connotations in the realist sense. The realist explanation of power is primarily built on hierarchy and material resources within the international system. "While it is true that material resources matter, they must be put into a relational context internationally to understand the outcomes they might produce" (Davis Cross and Karolewski, 2016: 9).

One of the conventional classifications of power refers to the "faces of power". Dahl (1961) examined political power using a pluralistic approach and showed that many interests can appear simultaneously in open competition. Bachrach and Baratz (1975) criticised Dahl's pluralism in the "second face", noting that hidden conflicts and non-decisions are also potential power in the hands of decision-makers. Lukes (1974/2005) further developed earlier concepts based on psychological aspects (the "third face"), pointing to subordinates' passive behaviour toward dominant actors. Finally, Digeser (1992), using a Foucauldian perspective, wrote about productive power in terms of dispersion through micro-relationships.

Joseph Nye (2004) described soft power as the ability to persuade other political opponents via persuasion, attraction or even *quid pro quo*. As Lukes (2007) pointed out, soft power is a tool for potentially controlling the preferences of others. Nye (2009) later introduced another concept of power – smart power, which means the simultaneous use of soft and hard power (section below).

Baldwin (2013) shows that it is necessary to connect power with politics; power does not exist without political relations. He defined the following essential elements of power: scope (behaviour of subordinate actors), domain (spread of power of the dominant actor), weight (reliability of power of the "master"), cost of political action (resources available for action), and means of action (symbolic, military, diplomatic and economic aspects).

An important part of the taxonomy of power is the distinction between relational and structural power. The key feature of structural power is that it is unintentional (Baldwin, 2013). In line with Bartnett and Duvall (2005), structural power describes positional aspects of different states; for example, world systems theory explains the position held by developing countries vis-à-vis the developed "centre". The concept of relational power suggests that values, norms and ideas play an important role in the power relations among political actors (Baldwin, 2013).

Another important dimension of power is the distinction between 'power to' and 'power over'. "Power to"

> *encompasses whatever capacity a society or any other collectivity may have to realize common values or purposes. To say that an individual or some other agent is powerful, however, usually means that it can bring about one kind of result: It can prevail over others–it can get them to do something they do not want to do, defeat them in a conflict, or perhaps even shape their understanding and desires.* (Starr, 2007: 18)

'Power over' has the goal of legitimating the use of power and establishing rules – the role is to limit power in action (Starr, 2007).

The structure of this article is as follows. First, we investigate how realism and liberalism as international relations theories shape the notion the power the EU holds in foreign affairs and neighbourhood policy by considering differences and commonalities of the two theoretical approaches together with combined approaches like liberal realism. Second, we present a vast set of various power approaches to the EU's foreign policy in which the liberal paradigm generally dominates alongside the 'realist' alternatives. Selected power conceptions are then applied, also determining the positive aspects and shortcomings of these approaches, in an attempt to explain the Russian invasion of Ukraine. Finally, we seek to identify which conception may be able to provide solutions to the conflict.

Research Questions and Method

The fact is that liberalism has largely neglected power relations since the end of the Cold War. The same has happened in the field of political theory, which has generally reflected the political practices in this period of time. The course of the Ukraine crisis reveals that the lack of a realist approach to the EU's foreign and security policy has led to misunderstandings about Russia's position in this conflict. On the theoretical level, despite considerable effort having been made to explain the international role of the EU, emphasising its civil, normative and ethical stance in the international community, hardly any academic analysis has shown the potential of a realist explanation of a problem the EU faces.

We assume that the theories of international relations generally complement each other and are not necessarily mutually exclusive. Realism and liberalism as important IR theories can give some new insights into complex issues of the international community (Proedrou, 2010). The aim of this article is to offer a theoretical and evolutionary explanation able to detect potential solutions to certain international conflicts, in particular a reconstruction of concepts referring to the EU's power in foreign policy. Another question that is examined is whether possible theoretical mergers and comparisons could hold value for political practice in the case of Ukraine. Here, a comparative approach is used to investigate different models of power in between the realist and liberal theories of international relations. Finally, apart from distinguishing the various power conceptions, a synthesis of them is attempted.

For a specific part of our enquiry – the Ukrainian conflict – we perform a SWOT analysis as an original idea borrowed from Opoka (2016) but refined in the present investigation by widening the original core of strengths and weaknesses of liberalism and realism with specific power explanations, which is our original contribution to the field of research. As Opoka (2016) noted, SWOT analysis is typically an economics method within the academic field of IR searching, besides strengths and weaknesses, also for opportunities and threats regarding certain concepts and events in the international community. Application of this method in the case of Ukraine is not new (Bratko et al., 2021; Holas, 2018; Dumitrescu and Constantin, 2022).

Between realism and liberalism – development of a sui generis power concept

With their focus on power, realist approaches have been relied on less by European scholars, albeit some have included realism as a definitional theoretical core. Cladi and Locatelli's (2012) analysis of European security policy stressed that realism can still provide a satisfactory analytical platform for explaining EU security issues. In the context of realism, the authors mainly examined structural and soft balancing strategies in European security cooperation, concluding that "the European Union represents a hard case for realism. Accordingly, liberal and constructivist accounts of the European integration process are currently more popular than realism, as they seem more able to grasp the exceptional features of the EU" (Cladi and Locatelli, 2012: 3). Realist analysis by Hyde-Price (2008) revealed that structural realist theory can also explain the nature of European security policy and the importance of bipolarity for international security. Hyde-Price (2006) additionally described how states in the international system are aware of their survival and the balance of power, rather than just defending the 'normative agenda'. Similarly to Hyde-Price, García Cantalapiedra (2019) assessed the European Union's Global Strategy from a realist perspective, which includes the Common Security and Defence Policy (CSDP) the challenge of strengthening European military capabilities.

Mearsheimer's critique of post-Cold War liberal interventionism is aimed at the lack of realist thinking in Europe. The mentioned author (2014) showed that liberal scholars have neglected the special role of superpowers in international relations by emphasising their fundamental role in securing the balance of power.

Kenealy and Kostagiannis (2013) pointed to Carr's classical realism as being able to provide new insights into the evolution of EU integration processes. In particular, his perspective on the widespread use of political power is likely to be seen as an accurate portrayal of an to be an accurate portrayal of EU history and political development. As the authors show, a specific relationship between power and morality offers some innovative viewpoints for further theoretical debates on European integration. They stated: "It aids the attempt to grapple with a key fault line that animates the contemporary EU, namely, that between the power of nation-states and the moral commitment to a supranational order" (Kenealy and Kostagiannis, 2013: 3).

In addition to the realist focus on security issues, commercial realism is understood as a realist strategy to give the EU greater economic power. Commercial realism combines security and economic issues within a single structure. In practice, the EU has used market power to influence Russia's security interests (Meissner, 2018). Wrexler (2006) applies the Welsh neorealist conception to the EU, with anarchy at the core of neorealism, which does not refer to chaos or violence, but mostly to the fact that there is no world government. According to the systemic logic of action, states are the central actors within this structure and tend to survive in the brutal international environment.

The structural approach to realism places the understanding of the EU in the global context, i.e., geopolitics, which is one of the classical axioms of realism, and assumes that a certain incoherence exists between the internal political structures and the external international environment with respect to the EU. The structural realist view thus points to quite a complex relationship with the EU that is sometimes not easy to explain (Rynning, 2005). For Jørgensen (2016: 92), the realist approach to EU affairs is in decline: "The realist tradition seems to have come to an end, at least in Europe; power politics has been largely absent in relations among the larger states /…/".

In general, the EU's concepts of CFSP/CSDP policy can be seen as largely liberal in orientation. However, the EU has also come up with alternative concepts of power in its policies that consider the EU as a completely different form of power. Andreatta and Zambernardi (2017) noted that modern European liberalism has operated with a productive character (instead of the destructive realist component). Rather than using military power exclusively, liberals know how to solve international problems using "internal forces" – domestic actors. In liberalists' imagination, international organisations play an important role in securing the economic interests of EU member states. Liberals argue that member states only intervene and negotiate on the supranational level when compelled to do so by internal forces.

Haukkala (2008) criticised the liberal hegemonic orientation of EU foreign policy in which, he noted, the EU had replaced previously important enlargement processes with control of a narrow political environment, like in the case of Ukraine. Specifically, his critique referred to the concept of the EU as a normative power in the context of the European Neighbourhood Policy – calling it "normative hegemony". Haukkala (2016: 76) later confirmed his earlier argument, stating that "the original argument is revisited by both expanding and qualifying it. It is expanded in the sense that it is argued that the EU's claim of hegemony is not only normative but is also underpinned by strong material, ideational and doctrinal foundations /…/.".

While conceptualising the notion of liberal realism, Skordas (2018) acknowledged the relevance of the balance of power as a strategy to ensure peace and stability in the international community. Skordas wrote (2018: 13): "In the present context, the term 'liberal realism' has a different meaning. In the natural language it signifies that the foreign and security policy is oriented towards liberal-democratic and universal values, but that it is also embedded in an overall policy framework advancing the Union's interests". Further, referring to the liberal-realist 'alliance' creates a real challenge for the established European values-system; namely, how to incorporate them within the EU's interests. For Sleat (2013: 72), "The realist vision of politics challenges liberalism by conceptualizing politics as an activity that takes place in conditions of ubiquitous, perennial, and ineradicable political disagreement and conflicts /…/".

Conceptualisations of the Power Held by the European Union

The concept of Normative Power Europe (NPE) (Manners, 2002; Whitman, 2011) offers insight into recent political conceptualisations of European policies in relation to ideas or normative forces. Europe is seen as a civilising power, a mediator and in some sense a responsible power (Whitman, 2011). For example, norms and standards in various policy fields are replacing more traditional – "coercive" – forms of policy in military or economic terms. Whitmann (2011) stated that the NPE paradigm is close to what some scholars define as civil power focused on the use of non-military resources. NPE rejects the traditional argument that only nation states are central actors in the international community and expresses the potential of the 'non-material' aspects of power (Whitmann, 2011: 4). As a realist thinker, Hyde-Price (2006) was critical of the "normative" and "civilian" conceptions of EU power in the international community. He argued that the realist approach moves away from the reductionist position of the normative approach and pays more attention to the systemic parameters of foreign and security policy.

Developed by Joseph Nye, the well-known concept of soft power was applied in the context of US foreign policy and later also in the context of Europe's global role (Forsberg, 2013). Duarte and Ferreira-Pereira (2021) explain that soft power is a matter of perception – of the roles that states play in an international environment. Both self-perception and external perception make up the image of soft power. The values, norms and principles of EU integration are emphasised in its external relations such as peace, democracy, the rule of law, and respect for human rights. The intergovernmental nature of the EU entails that the Commission formally shares responsibility for implementing the CFSP with the member states. This is one reason the EU's foreign and security policy is much weaker than in many other policy areas considered to be particularly important (Michalski, 2006: 130).

A similar form of power is smart power acting as a 'bridge' between the soft and hard forms. Since soft power forms part of the EU's external appearance, it lacks hard power resources in certain respects. In terms of its use of language, mostly determined as a strategy within a circle of soft power, political messages can also be seen as coercion (Davis Cross, 2011). Davis Cross (2011) argued that soft power ensures much broader uses than its hard counterpart. A perfect example of the use of soft power is the EU. Generally, the soft power concept is used to defend norms, rules, and humanitarian principles. The principles of hard power are primarily applied in the EU's enlargement, for example towards the Western Balkan countries. To date, the EU has often failed to use hard power (Davis Cross, 2011). As Jansson (2018) noted, smart power also has its origins in the realist tradition where the question is how power and politics relate to human nature. It fulfils the tenets of realism by incorporating the criteria of policy change that are missing in the realist approach.

Borzel and Risse (2009) used the term transformative power to highlight the EU's transformative potential in enlargement processes. The latter refers to the model of accession negotiations whereby candidate countries must meet several conditions to become full members of the EU. Elements of the EU's potential transformative power include the principles of good governance, the ability of a state to initiate and implement new reforms, political change in the face of new democratic challenges, and asymmetric relations between Brussels and the target countries where European institutions hold sufficient potential power to reform national policies. Similarly, Grabbe

(2006) examined the accession of the candidate countries and how the conditions applied by the EU prevailed in the relations between the candidates and the European institutions and member states. This led Grabbe (2006) to describe these unilateral relations as "asymmetric dependencies".

Toje (2011: 51) showed that the EU prefers "small-scale, low-intensity pre-and post-crisis management operations – all of which are relatively low on the international agenda". Accordingly, the EU is "economically strong, militarily weak, and politically fragmented. EU members have failed to pool anything resembling the autonomous intervention force originally envisioned" (Toje, 2011: 53).

In the mid-1970s, Francois Duchene declared that the European Community should find a role as a civilian power. This meant a strong economic role and less emphasis on the military side. In global terms, states should therefore cooperate more in the areas of trade and the economy. As Özer (2012) described, states that act as civil powers tend to use non-military power and politicise various political issues less. The EU actively played a fundamental role in the enlargement process, promoting the Neighbourhood Policy and concluding strong trade agreements with third countries. Özer (2012) also likened the EU's civil power to its normative goals: "The 'civilian ends' (or normative objectives) of a civilian power /…/ are peace and international co-operation, solidarity, strengthening of the rule of law in international relations, democracy, human rights, environmental protection, and the diffusion of equality /…/ justice and tolerance" (Özer, 2012: 73).

Moravscik (2010) stated that at the end of the unipolar era the USA was not the sole superpower on the global scale because Europe was also playing a key role in the international balance of power, using its soft and hard power simultaneously. To refer to the liberal interventionist logic, the EU was strongly influencing the enlargement processes, advocating good neighbour policies, trade, and foreign aid, and acted as a champion of international multilateral institutions and European norms and values. Moravscik (2010) argued that the EU has functioned as a true superpower alongside the United States. Nowadays, the EU's exercise of power in the field of military and security policy is clearly different from the greater potential it holds in economic relations. This argument is contrary to the school of realism in international relations (e.g., Mearsheimer, Walt, Waltz), which defended military power after the collapse of the Soviet Union (Moravscik, 2010). Similar to Moravscik's term, McCormik (2007) introduced "The European Superpower", while Gaenzle, Grimm and Makhan (2012) referred to the EU as a "power in the making".

Yet, Mearsheimer argued exactly the opposite. In his realist view, the EU cannot act as a true superpower in international relations, in part due to its liberalist focus on norm enforcement and negation of the role of true great powers and the global distribution of power. Mearsheimer sees the latter as evident in the Ukraine crisis (Mearsheimer, 2014).

Meunier and Vachudova (2018) explain that the rise of illiberal regimes within the EU has affected its potential to act as a major superpower. The authors follow the Dahlian position that a given country will act and behave like a superpower if it can apply soft power on the global level. They insist on the definition that the EU is a "potential superpower", especially in the context of the transfer of powers between member states and EU institutions in some policy areas (like military policy), which is often subject to slow political processes. Moreover, so-called liberal intergovernmentalism is always "shaped by the domestic political preferences that bring governments to the EU negotiating table" (Meunier and Vachudova, 2018: 2).

Gehring, Urbanski and Oberthuer (2017) reject the notion that the EU cannot act as a great power given its lack of military resources and potential to use hard power. The authors believe the EU's market policies demonstrate its ability to act as a great power/market power. Economic power has dominated the military counterpart: "Furthermore, cross-policy effects that are central to our argument have rarely been systematically examined, although there is evidence both in the theory and in comprehensive studies of EU foreign relations /.../. Accordingly, the great power politics occurs as a cross-policy effect" (Gehring, Urbanski and Oberthür, 2017: 2). This led the authors to refer to the EU as "inadvertent great politics". The 'corporate actorness' involved can ensure that the EU can act without the consent of the member states due to some autonomous rights it has in policymaking We agree that the EU functions with market power based on a single market of more than 550 million people, including various free-trade agreements (Gehring, Urbanski and Oberthuer, 2017). In a sense, the economic sanctions imposed by the EU against Russia are a result of market power strategies. Davis Cross and Karolewski (2016) stressed that in the EU considerable attention has been paid to studying policy development within integration processes, leading to a deficit in explaining the potential influence of externally driven factors. When discussing market power, we can equate it with Zimmerman's (2007) realistic power and the possibilities of the EU's trade with other major powers like China and Russia. Zimmerman (2007) stated that realism explains the EU's role in these negotiations through geopolitical factors and materialistic interests. The author (2007) noted that in international economic relations by using the concept "Realist Power Europe" states try to survive and often tend to maximise their power. States are in a process of constant interdependence in their economic relations. On top of the structural component, realism also builds on the behaviour of actors – economic policy must be consistent with the national interest. Zimmerman

(2007: 816) wrote: "Thus, while realism certainly has not been used widely to explain international trade policy, it is far from completely silent in this field and actually allows some distinct predictions about the goals of state actors".

Aggestam's (2008) concept of Ethical Power Europe (EPE) describes a reversal "in the EU's role and aspirations from what it 'is' to what it 'does': from simply representing a 'power of attraction and a positive role model to proactively working to change the world in the direction of its vision of the global common good'" (Aggestam, 2008: 1). The author agreed that the EPE concept encompasses civil and military power as well as social and material elements of power. Normative and civil power concepts pay stronger attention to the supranational level of the EU, while the EPE concept focuses on the member states. As Hyde-Price (2008) noted in his critique, some realists would also criticise normative, civil, transformative and similar concepts of power for their "ethical" nature. Still, as realists like to point out, the primary interest of states in an anarchic international environment is their desire to survive and secure their territory.

Pachecho Pardo (2012) moved beyond the conventional classification between realist and liberalist political thought by offering the concept of power called "Normal Power Europe". He explained that the EU's power has been described as normative, ethical and civil power from a very positive point of view. He agreed that all of these concepts only partially explained EU foreign policy. Realistically, the EU, like any other actor in international relations, seeks to maximise its power. Military and non-military power are accordingly used simultaneously depending on a given situation in an international environment.

Finally, Wagner (2017) coined the term "Liberal Power Europe", which in principle shapes ideas (norms and values) and material power (interests). Ideas and interests change nature through different issues and domains. Wagner (2017: 1402) described how:

> *The concept of liberal power thus brings about an understanding of causal pathways such as lobbying by interest groups or responsiveness to public opinion. Which of the two will dominate in any particular case also depends on a third key liberal variable – the institutions that serve as transmission belts and that make governments more or less receptive to lobbying and accountable to the electorate.*

Are the EU's policies inadequate for managing relations with the Russian Federation?

We saw above how the EU has developed a *sui generis* concept of foreign, security and defence policies by taking account of its own historical context, institutional set up and underlying specific European values. Here, it has developed its own set of power concepts that can be theoretically pinned to realism or liberalism or in between them. As such, the EU has been successful with its European neighbourhood policies or global policies in general, with the notable exception of certain cases. This includes its relationship with the Russian Federation, especially as regards Ukraine.

The EU is playing the role of a great power despite lacking in military resources (Gehring, Urbanski and Oberthuer, 2017). The EU's power potential chiefly lies in its ability to act as a true corporate actor and to thereby exercise strong market power. The EU has granted privileges to Ukraine associated more with the economic cooperation group than the mobilisation of governance resources related to CFSP policy areas. In the area of energy policies, a high level of interdependence between Russia and the EU has historically been evident. Casier (2017: 10) noted that "The relationship between Russia and the EU is in the field of energy policy highly asymmetrical providing more power to the Russian side". The EU has also been exercising its 'normative power' towards Russia. In its foreign and security policies, the EU has promoted the rule of democracy, social justice, and similar principles in many states, including Russia (Veebel, 2018). "The outbreak of the violent conflict between Russia and Ukraine at the end of 2013 clearly demonstrates that the EU has failed in its pursuit in Russia despite extensive mutual relations and comprehensive financial support provided by the EU" (Veebel, 2018: 698). In contrast to the normative power approach, Nitoiu (2015) argued that the EU has been forced to adopt a geostrategic approach rather than a normative power approach during the Ukraine crisis. "Over the years, the EU has received its fair share of criticism for not being willing and able to have a grand strategy or to even start thinking strategically in its foreign policy" (Nitoiu, 2015). Normative policies also failed in the case of the Crimean Tatars. "It is argued that even if political issues such as democracy and the rule of law are the main EU norms, the relations have been developed on the basis of economic and security priorities of the EU" (Çepel, 2018: 57).

Karolewski and Davis Cross (2016) highlighted the specific relationship of distrust between the EU and Russia. Despite this distrust, "the EU was able to react to the Russia–Ukraine crisis, and develop a complex mixture of instruments, such as sanctions towards Russia, institutional and financial aid to Ukraine as well as substitute gas delivery to Ukraine from the EU through reverse gas flows" (Karolewski and Davis Cross, 2016: 138).

The EU's transformative power was visible in Ukraine in the past. It was seen as a country whose stability and success with reforms would have a strong impact on the security of the EU (Sononenko, 2010: 5). The EU's anti-corruption policies have played a major role in Ukraine. In line with its normative power, "the clash of the EU norms with the prevalent norms, institutions, and informal practices of Ukrainian top officials has led to reform-imitation and resulted in institutional layering and partial institutional innovation" (Králiková, 2022: 245).

The liberal interventionist position regarding the EU's foreign policy views any greater "actorness" as limited due to internal incoherence among member states on how to respond collectively in the EU's external affairs. Moravscik and Emmons (2021: 189) emphasise that the power of the EU is quite "sporadic". Nevertheless, they show the EU's massive impact on the Ukrainian crisis "by providing support in almost major category" (Moravscik and Emmons 2021: 190). Moravscik and Emmons (2021) argued that Ukrainian political development has been successful because it has escaped Russian control and is closer to the West.

Mearsheimer maintains in his 2014 article that the 'West' has made fundamental mistakes with Russia:

> *Elites in the United States and Europe have been blindsided by events only because they subscribe to a flawed view of international politics. They tend to believe that the logic of realism holds little relevance in the twenty-first century and that Europe can be kept whole and free on the basis of such liberal principles as the rule of law, economic interdependence, and democracy.*

For Mearsheimer, the Ukraine crisis clearly shows that realpolitik principles are still fundamentally important. In his view, one of the crucial omnipotent strategies of the "West" was and remains the tension to "Westernise" Ukraine (extensive liberal-democratic convergence). In other words, in Ukraine the EU is using market tools and normative encouragements to act in response to a violator of international law.

Table 1: REVIEW OF THE UKRAINIAN CRISIS THROUGH THE LENSES OF REALISM AND LIBERALISM

Parameters / Approaches	**Liberalism BEHAVIOURAL POWER**	**Realism POSITIONAL POWER**
Perception of reasons for the crisis	Expansion of the liberal democratic model is perceived by Russia as a threat	Expansion of NATO and the EU to Russia's borders; the USA as the dominant power
The EU's approach	Advocacy of liberal norms; strong economic sanctions against Russia; the need to trade with Russia (Russia as a strong economic partner?); a norm enforcer; structural differences among member states limit the EU's potential in foreign policy; financial assistance	The EU is a rival (together with western states) to Russia; not enough power as a selective force (specifically in military terms); no major influence in foreign policy (realist explanation)
Some fundamental concepts of the EU's power potentially describing the Ukrainian crisis	Normative Power: consistency in the promotion of the EU's values Civilian Power: trade policy to support enforcement Ethical Power: power of attraction and persuasion (also a constructivist element) Transformative Power: a small transformative impact (?) Second/Quiet Superpower: "rational preferences about interdependence" (Moravscik and Emmons, 2021: 151) Market/Regulatory Power: the importance of energy issues	Smart Power (partly valid in liberal standpoints – a component of soft power): the role of values and interests Small Power: impossibility of employing a geopolitical approach Realist Power Europe: understanding of Russia's power potential Normal Power (partly using liberalism): interchangeably using military and non-military power Geopolitical Power (superpower): inconsistent geopolitical power (Rohac, 2022)
Solutions	Financial assistance to Ukraine, Ukraine's possible neutrality; cooperation with Russia	Recognition of a (super)power to establish/propose its sphere of influence; Ukraine as a buffer zone; no major role for middle powers
Strengths	Strategic rational behaviour; solution not military, albeit sending weapons to Ukraine	Reduction of tensions among superpowers; control of the weaker state; simplicity of solutions and the potential balance of power; pragmatism
Weaknesses	Misunderstanding of the Ukrainian crisis; problems of the EU's bureaucratisation; insufficient attention to irrational factors	Underestimation of irrational parameters; the Ukrainian perspective missing in analysis; no attention to the ideology, culture, or history of Ukraine
Opportunities	Ongoing communication of the parties involved	A liberal understanding of Russia's strategy and behaviour
Threats	Unstable nature of the conflict; threat to Ukraine's inclusion in the liberal-democratic model	Status quo or instability in conflict; an imbalance of power among superpowers

Source: adapted from Opoka, 2016; Mingst, McKibben, adjusted to the situation of Russia's ongoing invasion of Ukraine.

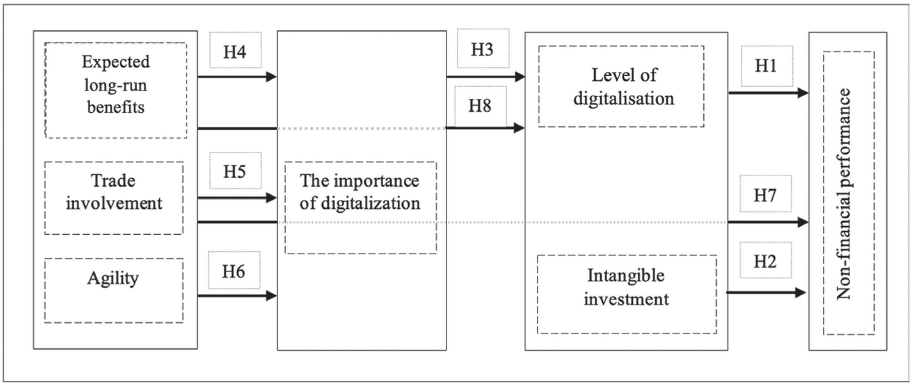
Conclusion

The fact the concept of smart power can be ambiguous and sometimes too misunderstood to be useful is where Europe's real strength lies. Faced with the 2013 crisis in Ukraine, the EU Commission took both a soft and a hard approach. Although the EU is mostly a soft-power actor, it has since engaged in very targeted smart power. The European External Action Service (EEAS) often employs smart power strategies (Davis Cross, 2011). Pacheco Pardo (2012) suggests that, alongside ethical, normative and civilian parameters, in some sense contemporary EU foreign policy includes "normal power" capacities. Following its operational logic, the EU's primary goal in foreign policy is to maximise its own security while also influencing the behaviour of other actors, with the European Security Strategy (ESS) being an example. In this way, the EU's aim is

> *to create a consensus on political institutions that are justified not by their ability to promote or avoid particular moral goods or evils, but by their ability reconcile though not perennially eradicate, conflict, and in doing so provide means for the peaceful coexistence of people with different and conflicting moral, political and religious views.* (Sleat, 2011: 483)

The European Union's Global Strategy (EUGS) was also established in this context: "/…/ the EUGS does not understand values and interests as opposite. The Union is a liberal realist power aiming to 'universalize' its values because its own interests are better served in a liberal world order" (Skordas, 2018: 14).

Table 2: HYPOTHETICAL APPLICATION OF SWOT ANALYSIS TO THE CONCEPT OF LIBERAL REALISM



Source: author's own analysis partially originated from Sleat, 2013.

In this article, we presented the positive sides and shortcomings of EU foreign, defence and security policies that are rooted in different theoretical understandings, historical contexts, institutional specificities, and roles of partners and opponents. This set of factors has been responsible for a major impact on certain international events, including the 2013 Ukrainian crisis and Russia's position in it. The hybrid approach of smart power highlights the EU's normative and ethical stance in its foreign relations and its desire to secure itself and maximise its own security.

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POLITICAL POLARISATION IN SLOVENIA AND ITS EFFECTS ON LIBERAL DEMOCRACY[1]

Abstract. *Concerns have been raised over the possible link between the growing political polarisation and fears of autocratisation in Slovenia. Faced with a lack of empirical data, we seek to answer two questions. First, how has political polarisation developed in Slovenia? We show that Slovenia has experienced massive increases in both ideological and affective polarisation on the levels of the citizenry and political parties. Second, what has been the effect of political polarisation on liberal democracy in Slovenia? A GLS (generalised least squares) model for the period 1992 to 2022 confirms negative effects only for affective, but not ideological polarisation regarding V-Dem's liberal democracy and judicial constraints on the executive indices.*

Keywords: *Slovenia, affective polarisation, ideological polarisation, autocratisation, SJM*

Introduction

The pernicious effects of political polarisation on democracy have been studied for a long time and were seen as responsible for the interwar autocratisation in Europe (Bermeo, 2003). Although it is only one of the contemporary drivers of autocratisation, alongside anti-democratic parties and low popular support for democratic values (Lührmann, 2021), polarisation also plays a central role within the other two forces. Anti-democratic parties succeed by elevating grievances to the *raison d'être* of their political movement (Ditto and Rodriguez, 2021: 23) and appealing to those identifying with a distinctive group that is hostile to internal dissenters and outside out-groups (Hogg and Gøtzsche-Astrup, 2021: 211–212). Polarisation

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is also expected to make voters more willing to accept anti-democratic measures (McCoy and Somer, 2021), making affective polarisation also a danger to democratic norms. The study of polarisation is consequently at the core of any study of autocratisation and seen as a crucial element in the autocratisation of Venezuela (García-Guadilla and Mallen, 2019), Turkey (Somer, 2019), Hungary (Vegetti, 2019) and Poland (Tworzercki, 2019). These developments have not only spurred a new wave of research (Somer and McCoy, 2018; McCoy et al., 2018; Somer and McCoy, 2019; McCoy and Somer, 2019), but also seen the spread of the concept of affective or Manichean polarisation. Contrary to ideological polarisation in the form of left–right placement or different positions on public issues, affective polarisation is of a relational (Us vs. Them) nature (McCoy et al., 2018: 18; Somer and McCoy, 2019: 13–14). Affective polarisation is not simply an individual's preference for their (in-)group or preferred party, but an active dislike for the out-group or opposing political party (Iyengar et al., 2012; Iyengar et al., 2019). The result is that voters attribute more weight to partisan or policy interests than to political candidates' or parties' support for liberal democracy (Svolik, 2019; Graham and Svolik, 2020; McCoy et al., 2020; Arbatli and Rosenberg, 2021).

Slovenia is another country that is considered as having experienced both growing polarisation and possible autocratisation. Attention to these developments has been raised by international watchdogs of political and social development (BTI, 2022; SGI, 2020) and of the state of democracy (Freedom House, 2020; Freedom House, 2021; V-Dem, 2022). It was also clearly expressed in a report by the European Parliament's Committee on Civil Liberties, Justice and Home Affairs. While its October 2021 mission observed that "public institutions overall work well [...] it expressed deep concern over the climate of hostility, distrust and deep polarisation in Slovenia, which eroded trust in and between various public bodies" (European Parliament, 2021: 15). A similar observation of a highly polarised political environment was made before the 2022 parliamentary elections by the Organisation for Security and Cooperation in Europe's Office for Democratic Institutions and Human Rights (OSCE ODIHR, 2022).

Studies of polarisation and autocratisation in Slovenia must additionally take account of the specific context of post-transition countries. Political polarisation is expected to be negatively impacted by low levels of party development and identification (Lewis, 1996; Olson, 1998) and weak cleavages (Elster et al., 1998; Tóka, 1998). As for autocratisation, younger democracies are not only more likely to experience structural and contextual challenges that heighten the strength of contemporary autocratisation drivers (Lührmann, 2021: 1018–1019), but are also unlikely to have completed the marathon entailed by the transformation of the political, economic and social power of the *Ancien Régime* required for the roots of liberal democracy to flourish (Berman, 2019; Magyar and Madlovics, 2020: 31–34).

Nevertheless, despite the need to keep these challenges in mind, not only has the study of contemporary autocratisation shifted to generalised worldwide explanations (Lührmann, 2021), our focus in this article is neither the reason *for* the origins and changes in political polarisation in Slovenia, nor *how* any possible autocratisation may have taken place. Instead, we seek to better understand the course of political polarisation in Slovenia and its effects on liberal democracy. Although one study looked at the evolution of political polarisation on Slovenian Twitter (Evkovski et al., 2020), we lack an empirical overview of how ideological and affective polarisation have developed in Slovenia. This dearth of data leads us to formulate our first research question: How has political polarisation developed in Slovenia since the country's independence? We use the Slovenian Public Opinion Survey (Slovensko javno mnenje – SJM) for the period 1992 to 2022 to obtain data concerning ideological polarisation on the population level. For polarisation of the party system, we rely on data from the Chapel Hill Expert Survey (CHES) for 2002, 2006, 2010, 2014 and 2019. Although obtaining population-level data for affective polarisation is hindered by the limited waves covering Slovenia in the Comparative Study of Electoral Systems (CSES), we have access to proxy indicators from the Varieties of Democracy Project (V-Dem) (Coppedge et al., 2023a; Pemstein et al., 2023). Given how polarisation has been linked to autocratisation, we also ask: What has been the effect of political polarisation on liberal democracy in Slovenia? Looking at V-Dem's liberal democracy index and some of its major components, we answer this question using a generalised least squares (GLS) model with data from 1992 to 2022 for both ideological and affective polarisation.

The article is structured as follows. The second section outlines the theories behind political and especially affective polarisation, along with its effects on liberal democracy. This is followed by an overview of different methods for measuring polarisation and democracy. The fourth section presents the results of a longitudinal analysis of developments in ideological and affective polarisation in Slovenia. The results of the GLS analysis on the effects of political polarisation on liberal democracy are described in the fifth section. At the end, we summarise the findings and provide a conclusion.

Political polarisation

What are ideological and affective polarisation

Both ideological and affective polarisation are best described with respect to their differences from each other. Affective or Manichean polarisation is different from issue-based attempts to measure polarisation, i.e., the ideological distance between political parties, political elites or citizens/voters (McCoy et al., 2018: 20). Affective polarisation is also not indicated by increasing polarisation of party positions as measured by the CHES (Vachudova, 2019: 90–91). Further, affective polarisation is not a left–right ideological self-placement since there are other dimensions in which citizens may be polarised, nor does it capture the multidimensional nature of political polarisation (Lauka et al., 2018: 109–110). Ultimately, Reiljan (2020) finds that while ideological and affective polarisation are related to each other, they are distinct concepts, with a substantial part of the latter not being explained by the former. Nevertheless, the former can create the basis for the latter (Persily, 2015).

Affective polarisation is more than just a preference for one's own group or political party, but requires an active dislike for the Other. Affective polarisation is thus the spread of the characteristics of exclusion, rigidity and confrontation present in the political struggle to other spaces of social coexistence like families, schools, churches and communities (Lozada, 2014: 4). The defining trait of severe polarisation is its suppression of "within-group" differences and the collapse of otherwise multiple and cross-cutting intergroup differences into negatively charged single differences used to define the "Other" (McCoy et al., 2018: 20; Somer and McCoy, 2019: 13–14).

How polarised societies hollow out liberal democracy

Affective polarisation into two groups is not inherently anti-democratic. If political, economic, and social/cultural grievances are genuine, the mobilisation of support via a simple agenda and a distinct candidate or party, all properly channelled through a "democracy-rebuilding program" (McCoy and Somer, 2021: 8; Stavrakakis, 2018), can indeed lead to positive democratic development. Accordingly, the danger to liberal democracy arises from the nature of polarisation and its bigger political context (Berman and Kundnani, 2021: 32), as well as the "*relation* between political actors and the *political* use of polarisation as a strategy" (McCoy and Somer, 2019: 263, emphasis in the original).

The pernicious effects of affective polarisation include the degradation of democratic norms, particularly mutual toleration and institutional forbearance. The former "refers to the idea that as long as our rivals play by constitutional rules, we accept that they have an equal right to exist, compete for power, and govern" (Levitsky and Ziblatt, 2018: 102). Institutional forbearance is avoiding action that breaks the spirit of the law even if respecting the letter of the law, thereby refraining from preventing the other side from achieving its objectives or going so far as to make it refuse to play by the rules (Levitsky and Ziblatt, 2018: 106–107). Political actors' respect of these two norms is critical for democracy's survival. Without these norms, elections become not a choice of policy, but of competing political regimes (Enyedi, 2016: 217). The end result is that "[l]ike many civil wars, both actual and metaphorical, the 'Party Wars' are not likely to end until one side gives up" (Schleicher, 2015: 438).

The negative effects of polarisation on democratic norms also extends to the citizen body. In a survey experiment conducted in Turkey, Venezuela and the United States, Svolik (2019: 26–28) discovered two patterns. The first is that ordinary people are willing to trade off democratic principles for partisan party or policy interests. The second pattern is that the fulcrum between democracy and autocracy can be centrists, political moderates willing to punish candidates who do not abide by democratic norms, even if they support their interests. However, data from the United States, which has been leading this type of research, shows that such centrists are few and far between because voters are more likely *not* to punish their "own" candidates (Svolik, 2020). Further, the stronger one's attachment to a political party, the more a voter is willing to accept their own party's democracy-eroding policies, that is, as long as their party is in power (McCoy et al., 2020).

Based on these observations, McCoy and Somer (2021: 9–10) propose the following pathway from polarisation to autocratisation. First, a political entrepreneur starts by exploiting popular grievances or formative rifts[2] by using an "Us versus Them" rhetoric, blaming alleged enemies and fomenting distrust. They do so by drawing on either existing or invented political identities, which also allows them to draw together otherwise diverse constituencies. One consequence is to divide a population into two opposing political camps, with little or no interaction or reasons to cooperate. Finally, political entrepreneurs can use this demonisation of the out-group to discredit and side-line internal and external opponents, as well as disrupt democratic rules, norms and institutions, all without fearing opposition. The result is a gradual, electorally driven, multiple year or electoral-cycles form

[2] Formative rifts are "long-standing and deep-cutting divisions that either emerged or could not be resolved during the formation of nation-states, or, sometimes during fundamental re-formations of states such as during transitions from communism to capitalism, or authoritarian to democratic regimes" (Somer and McCoy, 2019: 15).

of autocratisation called executive aggrandisement. These are policies that do not cause an abrupt regime change, but are still marked by a weakening or dissolution of checks and balances, horizontal accountability, and rule of law (Bermeo, 2016: 10–11; Lührmann and Lindberg, 2019: 1104–1107). Although the mechanism itself has not yet been tested (Lührmann, 2021), the negative impact of affective polarisation on liberal democracy indices was shown by Somer et al. (2021) and Orhan (2022a), each using a different indicator of affective polarisation.

Measurements

Measuring polarisation

The established approach to measuring ideological polarisation is based on Dalton's (2008) Party Polarisation Index (PPI), calculated as follows:

$$\text{Party Polarisation Index} = \sqrt{\left\{\sum(\text{Party vote share}_\text{i}) \times \left(\frac{[\text{Party LR score}_\text{i} - \text{Party system average LR score}]}{5}\right)^2\right\}}$$

To calculate the PPI for Slovenia, we use CHES data as it provides the best long-term coverage. The PPI ranges from 0 to 10, with the former indicating no polarisation and all parties placed in the same position, and the latter the highest level of polarisation and all parties at the two extremes.

Expanded to population-level ideological polarisation, Lauka et al. (2018: 116–118) adapt Dalton's formula to calculate the Mass Ideological Polarisation Spread (MIPS) and Mass Ideological Polarisation Extremes (MIPE), both based on a respondent's placement on the left–right political scale. MIPS measures variance and "expresses the spread of the distribution of ideological self-placement of respondents" (Lauka et al., 2018: 116). MIPS is calculated using formula (1) below. *P* is the individual left-right placement, is the average left-right self-placement for a given year, and *n* is the number of respondents for that year. MIPS ranges from 0 to 1, with higher values indicating stronger ideological polarisation. MIPE uses formula (2), with *Ls* standing for the share of individuals in a given year positioning themselves using 0, 1 or 2, and *Rs* for the share of those responding with 8, 9 or 10. The maximum value of MIPE is 0.25.

$$(1)\ MIPs = \sqrt{\sum_{i=1}^{n} \frac{\left(\frac{P-\overline{P}}{5}\right)^2}{n}} \qquad (2)\ MIPe = \frac{Ls * Rs}{0.25}$$

Although SJM has been asking the ideological self-placement question regularly since 1991, between 1991 and 1994, and in 2017, the scale used in those questionnaires was a 10-point one as opposed to an 11-point one as used by the formulas. This leads us perform the calculation of MIPS only from 1995 to 2021. In order to provide data since 1992 for MIPE, we use responses 1, 2 and 3 for calculating the left extreme. In case multiple surveys were available in a given year, we chose the one with the highest response rate.

Affective polarisation, however, lacks established measurements, necessitating new approaches (Lauka et al., 2018: Harteveld, 2021). What they all have in common is that they are based on CSES survey data, creating measures covering bi- and multi-party systems, for both partisans and non-partisans (Lauka et al., 2018; Reiljan, 2020; Wagner, 2020). Since data availability for Slovenia is limited at a maximum to four datapoints from 1996 to 2011 (Table 1), we opted for an alternative measurement as a primary source of affective polarisation.

V-Dem offers two variables that we can effectively use to measure affective polarisation in Slovenia. The first is political polarisation (v2cacamps_osp)[3], determined by whether "supporters of opposing political camps are reluctant to engage in friendly interactions, for example, in family functions, civic associations, their free time activities and workplaces" (Coppedge et al., 2023b: 227). This definition aligns with that of affective polarisation and we will be using and naming it as such. The indicator ranges from 0 to 4, with 0 signifying that supporters of opposing camps interact in a friendly manner, and 4 that they interact in a hostile one. We have data for Slovenia from 1989 to 2022.

The other variable we use is the polarisation of society (v2smpolsoc_osp), which looks at whether "differences in opinions result in major clashes of views and polarisation or, alternatively, whether there is general agreement on the general direction this society should develop" (Coppedge et al., 2023b: 333). This indicator was originally on a scale from 4 to 0, with 4 signifying no polarisation and agreement on the direction of society, and 0 that serious polarisation exists on almost all key issues, resulting in major clashes of views. We recoded the data so as to be consistent with the scale for affective polarisation. Time coverage for this variable ranges from 2000 to 2022.

Measuring democracy

To determine whether polarisation has had a negative effect on liberal democracy in Slovenia, V-Dem's composite liberal democratic index was used along with four of its most crucial components. Liberal democracy (v2x_libdem) is determined not only by electoral democracy, but also by the

[3] *The name in parentheses indicates the precise name of the variable used in the V-Dem dataset.*

limits placed on the exercise of executive power by "constitutionally protected civil liberties, strong rule of law, an independent judiciary, and effective checks and balances" (Coppedge et al., 2023b: 44). In addition to this main index, we use the clean elections index (v2xel_frefair), equality before the law and individual liberties (v2xcl_rol), and judicial constraints on the executive (v2x_jucon). These lie at the core not simply of how Europeans define liberal democracy (Hernández, 2016: 57), but are also the first to be targeted by autocratising actors (Boese et al., 2021). All these indices range from 0 to 1, with 0 indicating the lowest – least democratic – and 1 the highest – most democratic – levels.

Trends of political polarisation in Slovenia

In this section, we answer the first question regarding how political polarisation has developed in Slovenia following its independence. Given its importance and expected negative influence, we initially consider affective polarisation. Using CSES data, Orhan (2022b) calculated the levels of affective polarisation at the four available datapoints. Ranging from 0 to 10, with 10 indicating maximum out-party dislike, we see in Table 1 that Slovenia appears close to the mean of 4.34. Even in a comparative perspective, among 53 countries and 170 electoral surveys Slovenia does not stand out as having either high or low levels of affective polarisation in this period (Orhan, 2022a: 722).

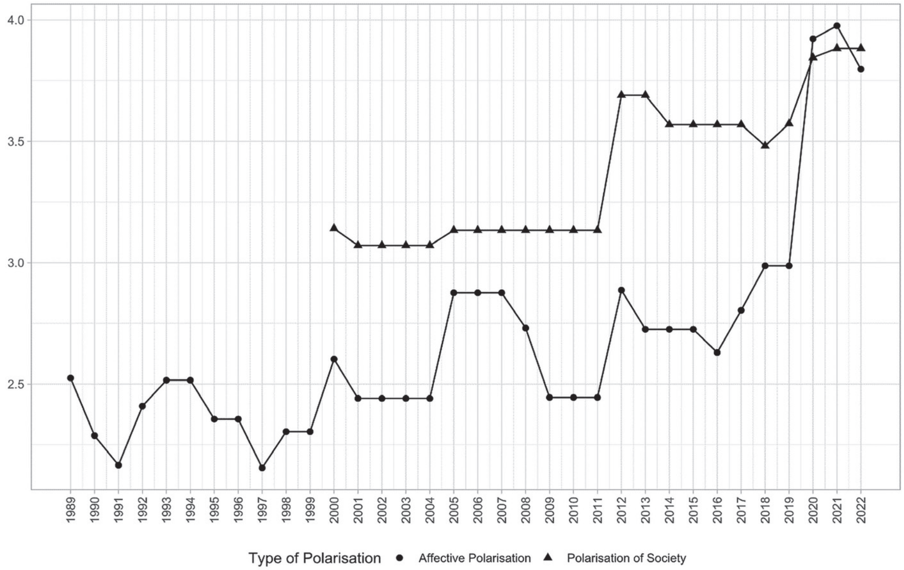
Table 1: CSES MEASURE OF AFFECTIVE POLARISATION

1996	2004	2008	2011
4.704	4.215	5.059	4.684

Source: Orhan (2022b).

Figure 1 shows the two V-Dem measures of polarisation, where it is evident that, except for a spike in affective polarisation between 2005 and 2008, the data reflect the CSES findings in that both affective polarisation and the polarisation of society were at a stable, middle level. Yet, this changes after 2011. Both V-Dem indicators reveal a spike that does not subside like the 2005–2008 one did. As concerns the polarisation of society, it has stayed at a high level since 2012, increasing to almost the maximum value between 2020 and 2022. Even though affective polarisation subsides somewhat bit after 2011, it never returns to the pre-2005 levels. Further, we observe a continuous rise since 2016, reaching almost maximum polarisation in 2020 and 2021, before dropping slightly in 2022. While we cannot confirm the same increase in affective polarisation among the general population, the similarity between public-opinion and expert data up until 2011 make us more confident when stating that Slovenia has always exhibited heightened levels of affective polarisation, while adding to the validity of the V-Dem data.

Figure 1: V-DEM'S AFFECTIVE POLARISATION AND POLARISATION OF SOCIETY

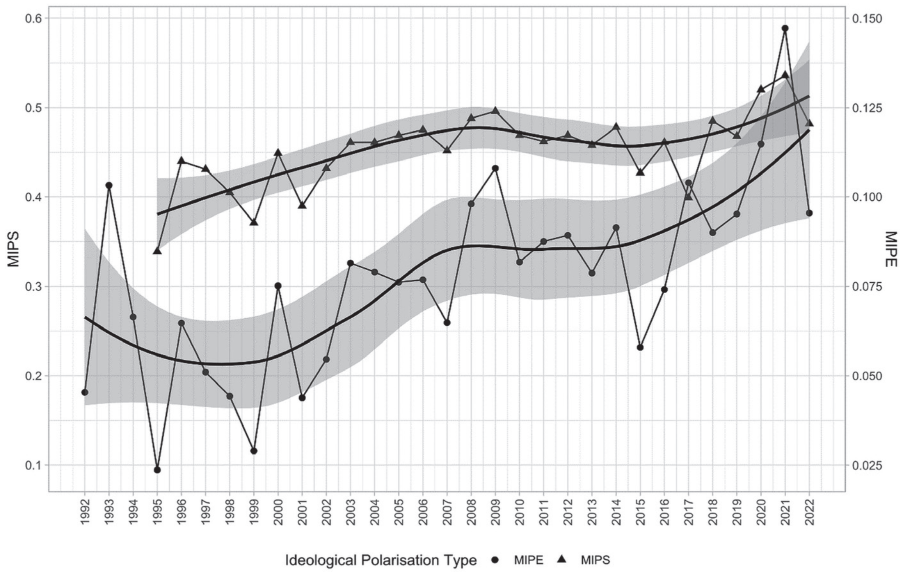


Source: Coppedge et al. (2023a); Pemstein (2023).

Another source confirming the steady growth of polarisation comes from our calculations of ideological polarisation. Figure 2 below shows the development of MIPE and MIPS between 1992 and 1995 to 2022, respectively, with MIPS represented on the left-hand Y-axis, and MIPE on the right.[4] The MIPS data make it clear that already several years after its independence, Slovenians exhibited a middle level of ideological polarisation, in line with CSES data on affective polarisation. What is more striking is the trend, rising steadily from 1995 to around 2009 before dropping to early 2000s levels in the intervening period to around 2017, when we see the yearly values again rising. The 2020 and 2021 datapoints also surpass the previous high in 2009, reaching a value above 0.5, although in 2022 MIPS drops back to 2018/2019 levels.

[4] *The thinner, point-to-point line, represents the raw data from each year, while the thicker, more fluid line in the middle represents locally estimated scatterplot smoothing (LOESS) used in order to mitigate year-to-year variation.*

Figure 2: MASS IDEOLOGICAL POLARISATION SPREAD AND EXTREMES



Sources: Calculations based on Toš and the World Values Study Group (2000); Toš (2000a; 2000b; 2000c; 2000d; 2000e; 2000f; 2000g; 2001; 2002a; 2002b; 2004); Toš and Malnar (2009); Malnar and Hafner-Fink (2009); Malešič (2010); Kurdija et al. (2010); Malešič et al. (2010); Kurdija et al. (2012); Hafner-Fink et al. (2013); Kurdija et al. (2013); Hafner-Fink et al. (2014); Kurdija and Malnar (2016); Hafner-Fink and Malešič (2016); Kurdija and Malnar (2018); Uhan et al. (2021); Kurdija and Malnar (2021); Hafner-Fink et al. (2021a; 2021b), Hafner-Fink et al. (2022).

This self-sorting towards ideological extremes is further confirmed by the MIPE data. While the earlier start date exhibits strong upward and downward fluctuations in the years prior to 1995, after 1995, when we have data for both MIPS and MIPE, we see that the latter's yearly ups and downs closely following those of the former. An important implication emerges by paying attention to the raw MIPE values. Looking at its lowest and highest points, we see the number of Slovenians positioning themselves on the left-right 0–10 extremes has increased almost six-fold in the last three decades. Even considering the value of around 0.05 in 1992 and the massive drop from 2021 to 2022 to around 2018/2019 values of 0.1, we may still speak of at least a doubling. Both the MIPE and MIPS data also confirm a previous detected trend of growing ideological polarisation among Slovenians (Jou, 2011: 36–37).

Table 2: PARTY POLARISATION INDEX

2002	2006	2010	2014	2019
2.581	3.758	3.319	4.404	5.203

Source: Calculations based on Jolly et al. (2022).

The greater ideological polarisation is also reflected in Slovenian political parties (Table 2). A look at the 2002–2019 period shows that the Slovenian party system became twice as polarised. This may have been the result of either political parties being perceived by CHES country experts as moving away from the centre, or a bigger electoral share going to political parties closer to the ideological poles, or both. We are also unable to say whether political parties follow the voters or the voters follow the political parties, although to the extent we can compare population- and party-level ideological polarisation, we see similar developments. Namely, an increase until around 2009, a drop or stabilisation until around 2013, then a rise from then onwards to the high point of polarisation we see today.

While Slovenia used to have one of the least ideologically polarised party systems in Central Europe (Casal Bértoa and Enyedi, 2011: 134–135), which we confirmed with the CHES data,[5] today, together with Hungary, it appears as one of the most polarised ones. The CHES data thus also confirm previous research showing the growing bipolarity of Slovenia's party system (Fink-Hafner 2006; 2020), with the negative effects of its increasing instability (Fink-Hafner and Krašovec, 2019) and inefficient governance (Johannsen and Krašovec, 2017). However, the party system's increased ideological polarisation is also expected to have a positive effect as voters can more clearly vote for those parties best aligned with their own ideological position (Dalton, 2008). The stronger party system polarisation therefore allows for continued increasing ideological voting among Slovenians (Jou, 2011: 39–41).

The effects of political polarisation on liberal democracy in Slovenia

The above section described how Slovenia and Slovenians not only exhibit higher levels of political polarisation, but also that it has been increasing, especially in the last decade. We are still left with the question of whether this increasing polarisation has had a negative effect on liberal democracy and its subcomponents. To answer this question and given the second-order autocorrelation of our data, we construct generalised least

[5] *Comparative data are available on demand from the author.*

squares models (GLS) using the restricted maximum likelihood.[6] Our model employs the composite V-Dem liberal democracy index and the free and fair elections, equality before the law, and judicial constraints on the executive indices for the dependent variables. The independent variables are V-Dem's affective polarisation index and the MIPE index.[7] Our time period covers from 1992 to 2022. Despite such an early start, we avoid covering the transition period, which could skew our results given that we are interested in whether the rise in polarisation has had a negative effect on liberal democracy *after* it was established in Slovenia.

The results are shown in Table 3 below. We find a statistically significant negative association between affective polarisation and the composite liberal democracy index, as well as between equality before the law and individual liberties, and the judicial constraints on the executive index. There was no effect on the free and fair elections index. Any substantive interpretation of the results is, however, made more difficult by the fact there is no agreement on how to interpret a change in V-Dem indices in terms of regime change, democratisation or autocratisation (Lührman et al., 2017: 6–8). In the case of Slovenia, the detected effect is quite strong, with a single-point jump in the affective polarisation index causing a 10% change in the value of the liberal democracy index. This drop can also be observed in values of the V-Dem liberal democracy index since the rise of affective polarisation from 3 to 4 between 2019 and 2020/2021 coincides with the drop of the index from 0.74 to 0.6.[8] Conversely, the drop in polarisation from 2021 to 2022 also coincides with the return of the index to 0.7. The same jump in affective polarisation can also be claimed to be responsible for the 0.015 drop in equality before the law index which, while not as substantial, indicates the wider negative effects brought by growing affective polarisation. We also identify a strong negative effect on the judicial constraints on the executive index, noting that a 1-point increase in affective polarisation results in the index dropping by 0.071, or 7% of the index's entire value. Our results are thus in line with comparative global studies on the effect of affective polarisation (Somer et al., 2021; Orhan, 2022a) as well as studies of its effect on liberal democracy in Slovenia (Fink-Hafner and Novak, 2021; Fink-Hafner, 2022).

[6] *We confirmed the second-order autocorrelation by examining the residuals of the same model using ordinary least squares as well as the Durbin-Watson test. We also ran additional diagnostics by running the model at different autocorrelation levels and then comparing them using ANOVA.*

[7] *We chose the MIPE index to better reflect affective polarisation's division of society into two antagonistic camps. However, since both MIPE and MIPS are highly correlated (Pearson's r of 0.76), we do not expect the results to differ. As a robustness test, we ran the same model with MIPS data and there were no changes in statistical significance.*

[8] *It should be noted that 2015 (index value of 0.81) represents the start of the long-term trend of first gradual then faster drops in the evaluation of liberal democracy in Slovenia.*

Table 3: GLS ANALYSIS OF THE EFFECTS OF POLITICAL POLARISATION ON LIBERAL DEMOCRACY AND ITS CORE COMPONENTS

	Liberal Democracy	Free and Fair Elections	Equality before the Law	Judicial Constraints
Affective Polarisation	-0.101***	-0.004	-0.015***	-0.071***
	(0.014)	(0.004)	(0.004)	(0.012)
Mass Ideological Polarisation Extremes	-0.099	0.016	0.028	-0.073
	(0.102)	(0.026)	(0.026)	(0.069)
Constant	1.075***	0.937***	0.989***	1.104***
	(0.066)	(0.013)	(0.010)	(0.046)
Observations	31	31	31	31
Log Likelihood	69.692	109.143	98.052	79.151
Akaike Inf. Crit.	-127.384	-206.286	-184.104	-146.302
Bayesian Inf. Crit.	-119.391	-198.293	-176.111	-138.309

Note: *p<0.1; **p<0.05; ***p<0.0

Source: Author's work.

Our results also confirm Orhan's (2022a) work that ideological polarisation does not have a statistically significant negative effect on liberal democracy indices. In addition, the coefficients for MIPE are both negative and positive. Despite these findings, we caution against dismissing the rise of ideological polarisation as a possible threat to liberal democracy. In Slovenia, affective and ideological polarisation have shared their ebbs and flows, with ideological polarisation showing a steady and continual increase. Moreover, the increasing positioning of Slovenians at the ideological extremes, whilst not statistically significant, points to long-term changes in the structure of Slovenian political life that can, in the longer run, cause an increase in affective polarisation or the behaviour associated with it.

Having both an observational and statistical link between affective polarisation and changes to the liberal democracy index means we must briefly open the discussion to consider the mechanisms by which affective polarisation negatively impacts a liberal democracy. In the theoretical overview, we presented the argument that growing affective polarisation makes citizens more tolerant or turn a blind eye to policies resulting in autocratisation since it is their own party that is adopting such policies or because it will hurt the "Other". What this fails to consider is that such policies are adopted by political actors, more precisely, party leaders, who are not only fed by it, but also feed it in turn, enabling them to obtain the mobilisation necessary for an absolute or even constitutional majority like in Hungary and Poland, thus allowing them to adopt policies that dismantle the safeguards of liberal democracy. Such parties are known by many names – anti-political-establishment (Camaño and Casal Bértoa, 2020), populist (Ruth-Lovell et al., 2019), anti-pluralist (Lührmann et al., 2021) – but their negative effects have all been proven. While expounding on the mechanism lies beyond the scope of this article, further in-depth case studies are required to better understand the role polarisation plays in the autocratisation mechanism. This also applies to the case of Slovenia because our results tell us little about how increasing affective polarisation led to a drop in democratic indices. The competence or lack thereof of a certain party or government (Frederiksen, 2022a), the ability of the aforementioned types of political parties to turn systemic failure into the perception of a crisis (Moffit, 2014), and even the increasing age of a democracy (Frederiksen, 2022b) can ensure that autocratising political parties go unopposed, remain in power, and continue their policies.

Conclusion

Our goal was to answer two crucial questions about political polarisation in Slovenia; first, how has political polarisation developed in Slovenia since the country became independent, and second, to ascertain what has been the effect of political polarisation on liberal democracy in Slovenia.

In answer to first question, we observe an increase in both ideological and affective polarisation over the past 30 years. However, our longitudinal overview provided us with a very interesting discovery about the polarisation trend, as something occurred between the 2008 and the 2011/2014 parliamentary elections in Slovenia. The former mark the stabilisation or even reduction of polarisation, while the latter two mark an inflection point, which restarted the trend of rising affective and ideological polarisation. This period hence deserves an in-depth case study. Ideological polarisation, especially the distribution of self-placement at the ideological extremes, has doubled since 1992, with the highs and low exhibiting a six-fold increase. The ideological polarisation of political parties also doubled between 2002 and 2019. As concerns affective polarisation, it rose from middle levels at the outset to the highest possible levels measured by V-Dem in 2020/2021, with only a minor drop in 2022. This indicates a country divided into two opposing, rival political camps that interact in a hostile manner with major clashes of views regarding all key political issues. The middle levels of affective polarisation are also confirmed by CSES post-electoral surveys up to the first pause in growing polarisation in 2011. As such, conducting the current wave of the CSES survey (or its equivalent questions on attitudes to political parties) will be essential for ascertaining whether the rise of affective polarisation in the last decade is also reflected in the general population.

In answer to our second question, our GLS models not only reveal a statistically significant negative effect of affective polarisation on the composite liberal democracy index, but more specifically on equality before the law and individual liberties, and judicial constraints on the executive index. We do not find such a relationship for the free and fair elections index. This leads us to generally confirm the negative effect ascertained by comparative research on the global level also exists on the national one (Somer et al., 2021; Orhan, 2022a). The fact that in 2022 a drop is observed in levels of affective polarisation concomitant to a rise in the liberal democracy index allows us, at least for one point of the observation, to say that the reverse holds true in the case of Slovenia. Whether this trend will continue has still to be seen. As concerns ideological polarisation, no statistically significant relationship was found, which is also in line with comparable research. There is also a need to further address the mechanism by which affective polarisation leads to autocratisation given that it feeds and is fed by political entrepreneurs and political party leaders. A case study of how this mechanism unfolded in Slovenia would greatly contribute to polarisation research. Finally, with V-Dem offering additional indices and (sub)components, further research would also allow us to more precisely pinpoint the aspects of liberal democracy that find themselves under attack in the conditions of growing polarisation.

Our study also adds to wider research on autocratisation in Central and Eastern Europe (CEE), in particular Hungary and Poland. While work on affective polarisation in the latter two countries benefits from specialised opinion survey data that was able to more clearly determine the proportion and distribution of individuals holding Manichean beliefs within their party systems (Krekó et al., 2018), it also lacks a statistical analysis confirming the effects of the growing affective polarisation. Although Slovenia cannot be directly compared to either country due to differences in the transformation of political institutions, economic liberalisation, nation- and state-building during the transition period (Johannsen and Pederson, 2009), our results give further evidence that affective polarisation is responsible for a negative effect in the CEE region, which calls for similar GLS studies of Hungary and Poland.

To conclude, we contend that providing a better understanding of how affective polarisation has developed and its effects, is the first step to ensuring that academia, politicians and the broader public have a strong framework upon which to inform their comprehension of developments in Slovenia and thereby make sure that polarisation's pernicious consequences are averted in the future.

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HEGEMONY, MORALITY AND EMOTIONS: POWER IN THE NEURAL ARCHITECTURE OF THE HUMAN MIND

Abstract. *The current debate on the crisis of democracy needs firm epistemological premises for the interpretation of election results and the manifestation of power as consent. In the article, a biopsychosocial model of hegemony is presented as a tool for the manifestation of power in the human mind. Hegemony as conceptualised by Gramsci is developed with the concept of power as both repression or spontaneous generation, as proposed by Foucault. The concept is developed with the paradigm of the embodied mind and insights from psychology and neuroscience about memory formation and meaning creation, stressing the role played by emotions in the process.*

Keywords: *hegemony, morality, emotions, elections, biopsychosocial model, mental representations, embodied mind*

Introduction

Power is the central topic of political theory (Hobbes, 1651/2011; Foucault, 1977; Clegg and Haugaard, 2009). It is manifested in everyday life as an *influence* on the thoughts and actions of members of a political community based on what is expected and accepted as right. Political anthropology (Južnič, 1987; Balandier, 1998; Lukšič, 2021) explains the human condition and the need for man to live in groups. Life in a community brings to the surface different needs and interests, beliefs and goals, antagonisms and conflicts. This creates the need for coordination and organisation, the necessity of *political action.*

As a political animal, humans construct their reality through the ideological struggle *to exert power over meaning.* Through political action, a community articulates *a contingent political structure* with power relations that determine the knowledge and behaviour of its members. The current

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form of the democratic political model based on freedom and equality is the result of political fights for *emancipation* waged over the centuries by liberal and working movements under the influence of the classic German philosophy and the liberal and Marxist traditions.

Yet, the contingencies of history mean that the hegemonic bloc existing today should not be taken for granted since it is open to development, depending on political action that will determine the future of the current political model. One should always bear in mind Althusser's warning concerning the "radical instability" of history that means any historical articulation "can be valid for a time but not eternally" and "can change without reason, that is, without an intelligible end" (2006: 195–196). Keeping democracy, as both a concept and a political practice built on the values of freedom and equality, is thus an ongoing process of political action.

The prevailing type of power manifested today is that based on consent, as best described by the concept of hegemony. People generally consent to be governed and live a moral life in line with the articulated power relations that determine meaning in everyday situations. Force applied by the state apparatus as power by coercion is rare these days and only used in exceptional circumstances. This makes it necessary for political theory to understand the ways in which power as consent works to produce and reproduce political order in a modern community.

The central mechanism for establishing a government in a democracy today is *elections*. It is thus important for political science to develop valid theories, concepts and methodology with *firm ontological and epistemological bases* to analyse this political phenomenon. In the current debate on the *crisis of democracy,* one can find scientifically valid approaches, partisan opinions, and utopian normative theories. Political science must be able to distinguish these, especially due to the responsibility that it holds in the debate about the future of democracy. Following the thinking of classic German philosophy, notably Hegel, and the Marxist tradition, the concept of democracy should be validated with the concept and historical process of human emancipation.

Democracy and populism

After the 2016 victory of Donald Trump and the successful Brexit referendum, many political scientists were striving to interpret the voters' decisions. A primary objective to help the debate on the future of democracy should accordingly be an epistemologically valid conceptual framework for analysing election results. Certain authors have instead jumped from being personally dissatisfied with certain election results to general criticism of the democratic model of today and the central role played by elections in it.

Yet, as Przeworski (2018: 3) notes: "Dissatisfaction with the results of elections is not the same as dissatisfactions with elections as a mechanism of collective decision making". Some political scientists may not be aware of this crucial difference, which in fact is the difference between political science and politics.

Instead of moralising about populism, political theory should further develop the ontological approach presented by Laclau (2005) to describe the logic of its articulation. As he explains, the first condition for the rise of populism is the failure of the governing political elite to satisfy the expectations of the people. After individual disappointments and unfulfilled demands keep accumulating, the next step is a simplifying discourse that hegemonically chains all these singular dissatisfactions under a unifying empty signifier with the logic of equivalence. This is how a new collective political identity emerges, via populist approach.

Populism is hence not a sign of the crisis of democracy as a political model, but a sign of the crisis of governing by the traditional political elite, which has in fact prevented any deepening of the democratic process following the introduction of general elections. Instead of questioning the legitimacy of elections as the mechanism for collective decision-making, when one is disappointed with election results one should analyse the reasons, mechanisms and processes of this phenomenon. While so doing, one should apply a valid scientific approach to understand the biopsychological dimensions of populist election victories.

Schumacher et al. (2022) did so by analysing "the affective responses that populist rhetoric actually evokes" (2022: 851). While measuring arousal with skin conductance and valence with facial electromyography, they found that it is not the anti-establishment rhetoric that evokes significant affective responses, although the pro-establishment rhetoric does so for "the lower educated and those who vote for populist radical-right (PRR) parties" (2022: 853). This shows "an incongruency effect: not messages *congruent* with someone's priors result in (negative) affective responses, but rhetoric that is *in conflict* with someone's existing attitudes" (ibid.). Further research could prove Laclau right in pinpointing dissatisfaction as the driving force of populism.

Since human existence is nested in *mental representations*, this is also the central object of interest in the scientific analysis of voters' decisions. To better understand *the processes of creating meaning and making decisions*, political science should adapt and embed the insights developed by psychology and neuroscience in this field. A valid political analysis should include the neural architecture of the human mind to understand political phenomena as *constructs of the embodied mind in a given context.*

Hegemony and emotions

In this article, *a biopsychosocial model of hegemony* is presented to explain how political power manifests in the brain. Hegemony as *moral leadership* is an emergent political phenomenon nested in biopsychological processes. The human mind is embodied and functions in relation to the context with which it is interacting. The most important tool for the embodiment of power is *emotions* as a biopsychosocial process defining the categorisation of things, phenomena and other people as good or bad. The biopsychosocial complex of hegemony, morality and emotions can therefore explain the functioning of power as consent.

As Heaney (2011) pointed out, political theory should better explain "the relationship between emotions and relations of power and domination" since "relations of power are emotionally valanced" (2011: 259). Understanding the role of emotions in how power is incorporated into memory formation, and how it is manifested in meaning creation, can help to achieve this goal. Emotions activate the biological mechanisms needed to form long-term memory of important events and concepts, and they filter the strongest concepts of meaning to make sense of a situation.

Emotions are hence a tool of political power in the brain, which represents a challenge for those rationalist normative theories of democracy that try to achieve "an unconvincing separation of reason and emotion" and see the "democratic space as a neutral realm of transparent communication" (Martin, 2013: 462). Meaning creation and its transfer to others by communication is determined by hegemonic power relations and emotions as their tool. Further, human reason is not only formal but mostly emotional and, instead of interpreting emotions as "distorsions of reason", one should acknowledge that they "orient cognition" (ibid.).

Like other fields of the human sciences, political theory has long been defined by the rationalist tradition of mind–body dualism. The cartesian logic of strictly separating the rational mind from the body "is an ontological shortcut, rather than a plausible and defensible ontology of the body" (Jenkins, 2005: 2). Further, this legacy that "is accepted (mostly) unquestioningly by political analysts... has severe epistemological and methodological consequences" (ibid.: 1). This exclusion of the embodiment of the human mind leads to political analysis that lacks epistemological validity to explain election results as the product of mental representations.

Expectations that some normative theories of democracy are based on rational choice theory are an ontological misconception, since it uses "a model that replaces homo sapiens with a fictional creature called homo economicus" (Thaler, 2015: 4). As McGraw (2000: 808) noted, "rational choice models... were rooted in assumptions that violate well-established principles of limited information processes". To analyse voters' decisions on ontologically and epistemologically sound bases, political science should therefore acknowledge the neural architecture of the human mind, and follow Machiavelli's approach to "go to the real truth of the matter, not to repeat other people's fantasies" (2009: 60).

Hegemony and morality

Political theory exposes two types of the manifestation of power as either coercion or consent (Gramsci, 1953; Hoffman, 1984; Anderson, 2017). In the project of emancipation, the starting point of the vulgar Marxism was to see the state chiefly as coercive, even though Marx stressed the ideological dimension of politics, and the importance of theory, consciousness and mind as a reflective part of the political process. The subsequent attention paid by political theory to power as consent was based on the realisation that one cannot explain how the economically dominant class retains power in a liberal democracy solely by stressing coercion (Hoffman, 1984: 1).

Gramsci was the first in the Marxist tradition to develop a comprehensive theory for the understanding of politics and the state with the conceptual separation of power as coercion, and power as consent. In so doing, he not only added "consent to an existing theory of the state as an instrument of coercion", but instead "[h]is concept of hegemony challenges the whole notion of the state as a class instrument" (ibid.: 4). With his view of hegemony as *moral and intellectual leadership,* he substantially redefined the interpretation of power in a modern political community articulated in a liberal democratic model (Lukšič and Kurnik, 2000).

Using the concept of hegemony, Gramsci describes politics and the state as an articulated historic bloc of values, meanings and behaviours that lead the people to reproduce the political structure with its relations of power. Ideological domination is hence based on "a set of descriptions of the world, and values that preside over it, that become in large measure internalised by those under its sway" (Anderson, 2017: 21). Power relations are accordingly an imminent phenomenon of life in a political community that defines the knowledge and behaviour of its members, with or without the need for physical force as coercion.

An important theoretical move was Gramsci's "conception of materiality of the ideology" that was no longer "identified with a 'system of ideas' or with the 'false consciousness' of social agents", but as "an organic and relational whole, embodied in the institutions and apparatuses, which held together a historical bloc around a number of basic articulatory principles" (Laclau and Mouffe, 1985/2001: 67). An ideological struggle is therefore waged to achieve domination over meaning, domination over thoughts and actions in order to define what is presupposed to be right.

In this regard, Hočevar and Lukšič (2018) stress the importance of retaining the conceptual distinction between hegemony and ideology to better understand Gramsci's theory. They emphasise that "ideology is in the service of political fights, in the service of the establishment of hegemony, and as such it is a (political) precondition for the constitution of the unity of a historic bloc" (2018: 21). Ideology is thus "an instrument of the fight for hegemony, since it constitutes a real political movement on a conscious level" (ibid.: 22).

Given that hegemony as ideological domination is based on moral and intellectual leadership, it is linked to morality, a biopsychosocial tool for categorising things, phenomena, and other people as good or bad. Through political action in the life of a community, people articulate moral systems with meanings that define the expected and accepted thinking and behaviour in a certain context. Morality is thus the battlefield for the ideological fight for hegemony.

Although moral systems are a contingent creation of intersubjective relationships as an ontic articulation, Haidt (2012) proposes that morality has an ontological foundation in evolutionary needs. He states "that morality is the extraordinary human capacity that made civilization possible" as "a feature of our evolutionary design" (2012: xii–xiv). He defines moral systems as "interlocking sets of values, virtues, norms, practices, identities, institutions, technologies, and evolved psychological mechanisms that work together to suppress or regulate self-interest and make cooperative societies possible" (ibid.: 314). Haidt's description of a moral system is hence the same as Gramsci's description of a hegemonic bloc, which makes hegemony and morality a political complex that regulates life in a community.

How is morality both an evolutionary dimension of the human condition and a contingent political articulation of power relations? The environment creates survival challenges that force an organism to cope with adaptive strategies such that it detects signals which trigger adaptive behaviour and activates a specific cognitive module that responds to the challenge. Since human nature calls for life in groups, this brings specific challenges and "involves tension *within* the group linked to competition *between* different groups" (ibid.: 14).

Haidt therefore understands morality as "adaptations to long-standing threats and opportunities in social life" while "[c]ultural variations in morality can be explained in part by noting that cultures can shrink or expand the current triggers of any module" (ibid.: 144). As he puts it: "We're born to be righteous, but we have to learn what, exactly, people like us should be righteous about" (ibid.: 31). Human nature, especially the nature of life in a political community, therefore requests basic moral pillars, e.g., care for the vulnerable or loyalty to your group[1], as answers to evolutionary challenges. These answers are contingently articulated with political solutions that form a hegemonic bloc.

Building on Gramsci's concept of hegemony explicating the "unity existing in a concrete social formation", Laclau and Mouffe (1985/2001: 7) set out to analyse the "logic of the contingent" in the process of constructing such a formation. Based on the postmodern theory of discourse, they presented the logic of the construction of a collective political identity as "a symbolic unity" in which the signified overflows the signifier (ibid.: 11). This means that an *empty signifier* (e.g., the people in current populist rhetoric) overdetermines different singular meanings with the logic of *equivalence*, and thereby unifies different political positions by simplification (e.g., the common fight against the corrupt elite).

However, the logic of equivalence does not imply that the differences (e.g., particularities of individual political fights) are eliminated in this unification process since "equivalence is not a relation of identity among objects", but it makes possible that "the identity of the object is split: on the one hand, it maintains its own 'literal' sense; on the other, it symbolizes the contextual position for which it is a substitutable element" (ibid.: 63). Namely, the differences do not disappear, but are put aside and overdetermined by the common political project. This is the logic that Laclau (2005) used to describe populism as a political identity embracing accumulated singular dissatisfactions due to unfulfilled demands.

Lash (2007: 55) was critical of the interpretation of power as symbolic and of "domination through ideology and discourse" in the description of the contemporary manifestation of power, and stated that "power now... is largely post-hegemonic". He noted that power has shifted "from the hegemonic mode of '*power over*' to an intensive notion of *power from within* (including domination from within) and power as generative force" (ibid.: 56). He stressed that power not only occupies the discourse, but "it penetrates your very being" (ibid.: 59).

Lash's critique is based on Foucault's concept of power. Foucault (1977: 213) highlights that power "is not in the hands of those who govern" and in fact power cannot be possessed at all, although he stated that "[e]verywhere that power exists, it is being exercised". His main point is that power is not just repression and domination, but also generation and creation. As Deleuze (1988: 70) depicted, Foucault adds to the concept of power the role

[1] *Identification with a group in a modern community can be practised on different levels, whether the family, peers, neighbourhood, political party, nation etc. These differences are however not relevant to the point made.*

"to incite, to induce, to seduce, to make easy or difficult, to enlarge or limit, to make more or less probable".

Lash's criticism of the notion of power as symbolic domination is correct since it does not describe all types of its manifestations. Yet the concept of hegemony can include Foucault's concept of power (Lukšič and Kurnik, 2000). Moral leadership of a political community presupposes two types of power as consent, as either repression or spontaneous generation. Hegemony and morality can manifest as either deontological, based on what is right or wrong, or utilitarian, based on what is good-or-bad-for-me considering the consequences. If a meaning and action is both right and good, hegemony is manifested as power of spontaneous generation. If it is right, yet bad when considering political consequences, it is manifested as the power of repression of a generated meaning.

Still, in order to use the concept of hegemony in the most common understanding of power, one must abandon the paradigm of postmodern theory of discourse and psychoanalysis, which Laclau and Mouffe based their work on, and instead develop the concept of hegemony as part of the neural architecture of the human mind. Since mental representations are the foundation of human existence, and hence the basis of political activity, in order to understand how power as consent is manifested in contemporary democracy, political science should acknowledge the insights of psychology and neuroscience for a biopsychosocial analysis of political action, including voters' decisions. This leads to the question: how does power manifest in the brain?

The architecture of the human mind and mental representations

The biological mechanism in which *mental representations* are nested[2] in the brain is the interaction between *neurons*, "the basic signaling units that transmit information throughout the nervous system" (Gazzaniga et al., 2019: 24). A neuron receives input from other connected neurons through dendrites and computes the importance of received information. Based on this computation, a neuron either continues the transmission of the signal or remains inactive. If the neuron is activated by received signals and the information is transmitted farther on, "electrical signals travel along the length of the axon" (ibid.: 27). At its end, a neuron is connected to others with *synapses*, "a specialized structure where two neurons come into close contact so that chemical or electrical signals can be passed from one cell to the next" (ibid.).

[2] *The concept of nesting is important by stressing the fact that mental processes are an emergent phenomenon and cannot be reduced to the functioning of biological mechanisms.*

Neurons thus exchange information with biochemical and bioelectrical signals, and the functioning of the brain "involves electrical-to-chemical-to electrical coding of experience" (LeDoux, 2002: 47). At every single moment, some neurons are active and others inactive, and mental representations are nested in the configuration of *simultaneously coactivated networks of neurons.* The computation that either excites or inhibits the activation of a neuron "reflects patterns of interconnectivity between neurons" with synapses as "the main channels of information flow and storage", which leads LeDoux to conclude that "the self is synaptic" (ibid.: 2).[3]

The structure of synaptic connections is therefore the basic biological mechanism determining the processes of meaning-creation and decision-making[4] and might hence also be the neural location of embodied hegemonic power relations. The biological mechanism that allows the embodiment of experiences, and thereby the hegemonic relations of power over meaning, is *neuroplasticity*. This is the human brain's ability to flexibly change the physical structure of synapsis, and by that to change the future conditions for the articulation of the coactivated configurations of neurons in which mental processes are nested.

Neuroplasticity is the feature of human nature that allows the brain to be open to and adapt to experience in interactions with the environment. Moreover, since humans have to live in groups, an important factor of their environment is intersubjective relations that are politically mediated. Political power is namely an emergent phenomenon also nested in the synaptic structures of the brains of members of a political community.

Yet how should political science approach the analysis of the embodiment of power? Like any other scientific discipline, political science is a battlefield of different competing paradigms as "recognized scientific achievements that for a time provide model problems and solutions to a community of practitioners" (Kuhn, 1962/1996: x). In the last decades of the twentieth century, dissatisfaction with the conventional approach to the study of human activity brought a paradigm shift in many fields of science, because when "[c]onfronted with anomaly or crisis, scientists take a different attitude toward existing paradigms, and the nature of their research changes accordingly" (ibid.: 90–91).

In his book on the history of *the cognitive revolution,* Gardner (1987: 10) underscores the importance of the conference on "*Cerebral Mechanisms in Behavior*" held in 1948 as the turning point in the paradigm shift following the dissatisfaction with behaviourism as the prevailing paradigm in human

[3] *We are aware that mechanical or biological reductionism cannot describe a mental process, but would like to stress the biological foundation of this process that is usually neglected by political science.*

[4] *Nikolić (2023) has recently proposed an alternative mechanism that determines the information transmission in the brain, but currently the prevailing theory in neuroscience remains the synaptic one.*

sciences. The most important feature of the cognitive paradigm became "the belief that, in talking about human cognitive activities, it is necessary to speak about mental representations" (ibid.: 6).

A similar paradigm shift appeared in the field of economics following the accumulation of cases seen as anomalies, since "behavior was inconsistent with the idealized model of behavior" according to the dominant economic theory (Thaler, 2015: 4). As Thaler stressed, those deviations from expected behaviour showed "that economic models make a lot of bad predictions" due to the "misconception of human behavior" (ibid.: 4–5). At first, "many economists strongly resisted the call to base their models on more accurate characterizations of human behavior", but eventually the paradigm of *behavioural economics* prevailed "with strong injections of good psychology and other social sciences" (ibid.: 9).

Another important area of the paradigm shift was medicine where Engel (1977/2012: 377) criticised biomedicine for being based on "a model of disease no longer adequate for the scientific tasks and social responsibilities of either medicine or psychiatry". The problem he exposed was the mirrored ontological misconception based on the cartesian mind–body dualism. While the human sciences have excluded the body from the analysis of human phenomena, medicine has excluded psychosocial factors and focused solely on the body. Engel (ibid.: 386) thus highlighted the need for a "biopsychosocial model" that would take all the factors and their interrelationships into account to holistically understand and explain the human condition.

The concept that emerged in human sciences after the paradigm shift described above was that of the *embodied cognition that interacts with the context.* Lakoff (2012: 773) summarises the central ideas of the concept as follows:

> *(a) we think with our brains, that is, thought is physical and is carried out by functional neural circuitry; (b) what makes thought meaningful are the ways those neural circuits are connected to the body and characterize embodied experience; (c) so-called abstract ideas are embodied in this way as well, as is language.*

The focal point of embodied cognition is thus the finding that reason cannot be disembodied, yet depends on and is mediated by motor and sensory neural circuits. Not only do these neural circuits provide information for creating meaning, but they also contribute conceptual structures for the interpretation of a context and for scenarios constructed in the mind. Thus, wo/man can only think in relation to her/his perception and body movement. Further, an important principle of *conceptual blandings* in the process of meaning-creation is the adjustment of the elements of meaning with a view "to anchor the integration networks in blends at human scale, using the vital relations that are employed in perception and action" (Fauconnier and Turner, 2002: 319).

Among the methodological challenges in the study of emotions in politics, Lynggaard (2019:1205) raises the distinction concerned with "whether political emotions are approached as the property of individuals or a collective phenomenon". This dilemma is related to the presented question of how political science should approach the analysis of the embodiment of power. Lynggaard presents the object of analysis as "the relation between political agency and structure" (ibid.).

The biopsychosocial approach can solve this problem because it explains the relations between individual biopsychological processes in the context of a political community. As Lynggaard (ibid.) notes, "[n]euroscience has shown how emotions as a biological phenomenon are both associated with individuals and collectives in the sense that individuals' emotions are, at least in part, a function of group interactions". The paradigm shift based on the concept of the embodied mind functioning in a context exposes the process and mechanisms that make emotions a biopsychosocial tool for an individual's cognitive and behavioural orientation in the political community. This means the hegemonic political structure is the context in which a political agent functions. Through experiences in a political community, one embodies moral systems and the relations of power, and emotions play an important role in this process.

A valid political science should accordingly acknowledge the embodiment of the human mind, and adapt and embed the findings of psychology and neuroscience in the analysis of political phenomena. *A biopsychosocial approach to political analysis* includes all relevant factors regarding the body, the mind, and the political context in which mental processes lead to meaning and decisions. To understand the functioning of political power in these mental processes, it is important to look at the conceptualisation of emotions as constructs in an event.

Emotions as constructs in an event

Like other scientific disciplines, psychology was concerned with developing a paradigm that would connect psychological phenomena with neural phenomena, while avoiding reductionism in the process. As Barrett (2009: 326) noted: "Psychological states such as thought and feelings are real. Brain states are real. The problem is that the two are not real in the same way, creating the mind–brain correspondence problem". Connecting psychological phenomena to neural activity thus poses an epistemological challenge, the same as how political science must connect voters' decisions to the functioning of the embodied mind.

The solution Barrett proposed to overcome this challenge was to look at psychological phenomena as *complex constructs composed of basic primitives.* Even though one cannot reduce a psychological, or political, phenomenon to the functioning of biological mechanisms of the body, an epistemologically valid analysis of this phenomenon can describe the primitives that do "correspond closely to distributed networks in the brain" (ibid.: 331). Moreover, "all mental states (however categorised) can be mapped to these more basic psychological primitives" (ibid.).

Voters' decisions are thus an emergent phenomenon created in a mental process that can be mapped onto basic primitives that correspond to the functioning of bodily and neural mechanisms. Psychology and political science thereby retain the separate scientific object they analyse, albeit they do it on sound epistemological bases with the acknowledgment of human nature and the embodiment of the mind.

Combining constructivism and the concept of the embodied mind that interacts with the context in a biopsychosocial model of analysis can assist political science to better understand political action and the manifestation of power. The centrality of mental representations as the object of analysis of any human activity leads to the need to include the body in political analysis, and to abandon the theory of rational choice or any other ontological misconception based on the rationalist tradition of mind–body dualism that separates reason from emotions.

In his analysis of patients with "damage to brain regions necessary for the deployment of certain classes of emotions and feelings", the neuroscientist Damasio found that "[t]heir ability to make appropriate decisions is compromised in situations in which the outcomes are uncertain, such as making a financial investment or entering an important relationship" (2004: 140). Since other brain functions were not affected, Damasio concluded that the patients' reasoning defect was "due to the impairment of an emotion-related signal" because in the construction of mental representations "they failed to activate an emotion-related memory that would have helped them choose more advantageously among competing options" (ibid.: 144).

This means that the conventional rationalist idea that one must suppress one's emotions in order to make a reasonable decision is ontologically wrong. The indispensable function that emotions play in decision-making is the consideration of "the *future outcome* of the actions" (ibid.: 145). As Martin (2013: 462) stated, emotions "orient cognition". Taking account of the consequences of an action means taking account of the relations of power that determine what is expected and accepted as right in a political community.

Emotions are hence an important feature of human reason and political science should acknowledge this in descriptive analysis and normative theories. Further, emotions are not a biological mechanism that reacts to the context since man is "not a passive receiver of sensory input but an active constructor of [his] emotions" (Barrett, 2017: 31). Rationalist normative theories of democracy accordingly hold a wrong view on emotions as they "are not temporary deviations from rationality" and are instead man's "constructions of the world" (ibid.: 225).

Besides, emotions are *a biopsychosocial tool of power* because they not only participate in meaning-creation and action-prescription, but are also a tool for influence. As Barrett states regarding the function of emotions in relations with others: "We are a bunch of brains regulating each other's body budgets, building concepts and social reality together, and thereby helping to construct each other's minds and determine each other's outcomes" (ibid.: 291).

Emotions are a tool for orientating humans in a given context, which includes living with others in a political community. This makes emotions a tool for the embodiment of morality since both emotions and morality are tools for categorising things, phenomena, and other people as good or bad. Given that morality is determined by hegemonic relations of power, *the biopsychosocial complex of hegemony, morality and emotions* can explain how political power works in the neural architecture of the human mind.

The process of forming memories

The first element in understanding the embodiment of power is memory formation. As explained, neuroplasticity enables flexible changes of synaptic structures to make learning from experience possible. Like other biological mechanisms, memory's function is the preservation of life. Memory creates a bias in the interpretation of future bodily and sensory information and thereby alters the probability of the simultaneous coactivation of a certain neural network. Regarding life in a political community, memory thus embodies power of different meanings according to the articulated political structure. Hegemony consequently determines the probability and acceptability of a certain meaning in a politically relevant context.

Memory formation is hence *learning from experience,* and can occur in two ways. Either by repetition of a pattern of experience due to frequent coactivation of a certain neural network, after which the synaptic structure strengthens the connection between the neurons involved, which is known as Hebbian learning (Hebb, 1949). Alternatively, the same effect is achieved by a single experience with *emotional intensity.* Emotions are thus an important tool for embodying an experience into the synaptic structure.

Following a series of experiments, Cahill and McGaugh (1995) uncovered the process and mechanisms via which an emotionally intensive experience is memorised. They presented a set of visual stimuli to two different groups and created "two different stories by varying the narration that accompanied each slide", a neutral and an emotional one (1995: 410). The subjects who were emotionally aroused "subsequently exhibited enhanced memory for the story" (ibid.).

While later analysing the process and mechanisms involved, Cahill and McGaugh discovered that emotional arousal after an experience activates the stress mechanism which releases neurochemicals such as adrenaline, noradrenaline and cortisol. Since "[l]ong-term memories are not made instantaneously" but "consolidate over time after learning", they stressed the importance of "neurobiological systems that regulate, or modulate, long-term memory storage" (1998: 294). Accordingly, emotions as a biopsychosocial tool activate the biological mechanism for the embodiment of an experience for its future role in the interpretation of a context.[5]

Cahill and McGaugh explain this process as a survival strategy "from an evolutionary and functional perspective" since man "would appear to benefit little from having memories for trivial events that are as strong as memories for more important events" (1996: 237). This explains why the role of emotions in memory formation is to "reflect the degree to which the information is worth storing" (ibid.). The process and mechanisms involved in forming memory of emotionally intense experiences are then a tool by which political power is also embodied in the synaptic structure. Emotions add intensity and valence to concepts in memory to make sure of their future activation in appropriate contexts, whether it be to avoid danger or grasp an opportunity.

The process of meaning creation

The second element for understanding the embodiment of power is *memory retrieval in meaning creation.* A distinction is to be made "between memories that are formed and stored in a way that can be consciously retrieved, and memories that are stored implicitly, and hence are not consciously experienced when retrieved" (LeDoux and Lau, 2020: 1019). Another distinction is between episodic memories and "semantic memories of factual and conceptual information about what things are and are not" (ibid.). In any case, "[m]emory is necessary to turn meaningless sensations into meaningful perceptions" (LeDoux, 2020: 197).

[5] *For a presentation of the process of memory consolidation with sharp wave ripples, Buzsaki (2019: 199–217).*

Semantic conceptual knowledge is the structure of meaning that includes the hegemonic relations of power and emotionally stamped intensity and valence. Concepts are ready to be activated to make sense of a situation in the process of creating meaning. The creation of mental representations, including voters' decisions, is embodied and nested in the synaptic structures that determine the simultaneous coactivation of neurons. In the process of meaning creation, the brain integrates bodily and sensory information with emotional information and semantic concepts.

This means that when one is faced with a given context, the mental representation for its interpretation and subsequent action are created through the integration of different features. As mentioned in the section on the architecture of the human mind, mental representations are nested in the configuration of simultaneously coactivated neurons. The integration of signals and concepts in the process of meaning creation is unconscious and only some mental representations enter the mental space of consciousness in the "working memory, a mental workspace involved in the control of thought and action" (ibid.: 198). In the process of creating meaning, "[w] orking memory uses executive control functions, like attention, to select, monitor, temporarily maintain, and integrate diverse kinds of information from specialized processors" (ibid.).

To understand *how power functions* in meaning creation, it is necessary to look at *how neurons are activated* to form configurations of simultaneously coactivated networks in which mental representations are nested. As explained, the activation of a neuron depends on the computation of the importance of the input information that is defined by the structure of the connections between neurons. Peruš (2001) states that the logic of computation and subsequent activation of a neuron is *energy efficiency,* a general logic of nature. Hence, in competition between alternative concepts, the winner is usually the one that takes less energy to coactivate a network of neurons, which chiefly depends on the synaptic structure and formed patterns as a result of experiential learning. Meanings that have hegemonic power and an intense emotional stamp have an advantage.

Yet, just like history is contingent and depends on the encounter of political action with the conjuncture, the same goes for meaning creation. As Kahneman (2011: 22) described, there are *two systems of decision-making,* an automatic and quick one, that operates unconsciously, and a deliberative and slow one, that "allocates attention to the effortful mental activities that demand it, including complex computations".

The automatic and unconscious processes of meaning creation are effortless because they are based on energy efficiency and use shortcuts like *heuristics and biases* to make sense of a situation with the meaning that takes less energy to arrive at. On the other hand, the effortful deliberative system, that consumes more energy and is thus limited, can nevertheless suppress the meaning proposed by the first system. This means that it can also reject the hegemonic meaning offered, reject the political structure articulated, and not consent to power.

Emotions are an important ingredient in the process of meaning creation. As Barrett (2017) explained, emotions are not a biological mechanism that reacts to environmental triggers, but a mental construct in an event. LeDoux (2012) also emphasises that when thinking about emotions one should distinguish between basic neural survival mechanisms and constructed feelings as mental representations. Survival mechanisms, such as that for detecting threats in the environment, are only the starting point of the process, and these "[g]lobal organismic states are part of the raw material from which certain classes of feelings are constructed" (2012: 664). Organismic states are hence the ingredients, yet they are not the same as the constructed emotions.

Although the activation of survival biological mechanisms is one source of bodily information that is integrated into the process of meaning creation, the constructed mental representation that makes sense of this information includes semantic concepts, together with attributed emotional intensity and valence, and hegemonic power relations. Man thus creates his reality as an actor, and this mentally created reality is partly constructed with intersubjective concepts as the results of life in a political community. Mutual experience creates concepts, whose "validity, and their very existence, in fact, comes from consensual agreement" (Barrett, 2009: 327).

The factors involved in the process of meaning creation are accordingly bodily and sensory information about the situation, and emotional information and semantic concepts as part of the learned knowledge. When one is making sense of the situation and deciding on the appropriate action, the brain is "categorizing to best fit the entire situation and your internal sensations, based on past experience" for "selecting a winning instance that becomes your perception and guides your action" (Barrett, 2017: 113). If hegemony and emotions win in this selection, power as consent is manifested in the event.

Conclusion

Mental representations are the central object of analysis for understanding political phenomena, e.g., voters' decisions. An ontologically and epistemologically valid political analysis should acknowledge the neural architecture of the human mind and its embodiment, and thus embed the insights that psychology and neuroscience can add to political science. The biopsychosocial analysis of power includes all pertinent factors and their interrelationships. Even though political phenomena should of course not be reduced to biology, they are certainly nested in the functioning of biological mechanisms.

The biopsychosocial model explains how the mind interacts with the context, and both how the body affects the mind, and respectively the mind affects the body. Life in a political community leads to antagonisms and conflicts due to different needs and interests, varying beliefs and goals. Hegemony is articulated through political struggles, yet it is not just a symbolic dimension. On one hand, it is defined by the human body, which with its motor and perceptual systems poses conceptual frameworks for a possible meaning, and poses biological limitations, such as the capacity for deliberative reasoning. On the other hand, through emotional intensity of a political experience hegemony enters the body, and activates and orients biological mechanisms.

Human existence, together with political power, is the interplay of the body, the mind, and the context with which one is interacting. A biopsychosocial political science can help to place the debate about the future of democracy on sound ontological and epistemological foundations. Understanding the complex of hegemony, morality and emotions as a tool for the manifestation of power as consent, and hence the prevailing political phenomenon in the modern liberal democracy, can help to distinguish between partisan opinions, utopian normative theories, and valid political science.

The process of human emancipation is linked to the democratic political model based on the values of freedom and equality. Due to the contingency of history, every period in the crisis of democracy can lead either to the strengthening and deepening of the democratic process and participation or to it breaking. The current rise of populism is a sign of people's deep dissatisfaction with the traditional political elite. In order to orient the political process to the road of emancipation, political science has the responsibility of understanding the moment and current phenomena, which can only happen with valid ontological and epistemological bases of the human mind and action.

The biopsychosocial model that understands mental representations as constructs of the embodied mind functioning in a context can help analyse populism and orient the political action to strengthen democracy, which cannot be done without avoiding misconceptions, such as mind–body dualism, and utopian theories, such as rational choice theory. This means it is important to acknowledge that humans are emotionally rational and to understand that emotions are an important biopsychosocial tool for the embodiment of power over meaning and for political orientation within a community. These premises can help to build an efficient architecture of deliberative practices and government politics that will satisfy people and prevent the democratic model and the process of emancipation from breaking.

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AGENDA SETTING ABOUT THE WAR IN UKRAINE: THE IMPACT OF TELEVISION IN KOSOVO

Abstract. *The article examines agenda-setting factors in Kosovo concerning the war in Ukraine. Due to the complex situation in the Western Balkans and the context of the tensions between Kosovo and Serbia, the presented research explains the role played by television in the hybrid media environment as the most important source of information in the crisis. The research looks at how television has impacted how the public views the war in Ukraine, and how it has covered the situation both before and after the invasion. A mixed methodology consisting of a questionnaire, television monitoring, content analysis, and desk research was thus adopted on the empirical level. On this level, 716 news stories were analysed between 1 February and 31 March 2022 and a survey with 1,312 respondents from Kosovo was conducted in April and May 2022 to identify different agents in the agenda setting and how that works with respect to the war in Ukraine. The research results show that the war in Ukraine has dominated the agenda of television stations in Kosovo, while the effects of their reporting vary according to the audience's demographic characteristics.*

Keywords: *agenda setting, framing, Kosovo, public opinion, Ukraine, war*

Introduction

The war in Ukraine – the biggest threat to peace and security in Europe and estimated to "go beyond its relations with NATO" (Mankoff, 2022) – continues to be the event currently attracting the greatest international attention. News of thousands dead and over 6 million displaced (UNHCR, 2022) since Russia began its invasion on 24 February 2022 has

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dominated the media agenda around the world. "The First Social Media War" or "World Cyberwar I", as announced by the Ukrainian Minister of Digital Transformation (Brown, 2022), are names that reflect the intensity and use of social media during this war. The ability to disseminate information in real-time and the importance of videos appearing on platforms like Facebook, TikTok, YouTube, Twitter and Instagram have determined the strategic use for information, disinformation, and audience influence. The aggression that has shocked the world has also challenged professional reporting due to the difficulty of verifying sources in an environment 'bombarded' with information suiting the interests of the parties. For Ukraine, social media has provided new channels to share information that have helped with the resistance and secure external support, while for Russia it has provided an opportunity to produce the "fog of war" to hide the truth (Ciuriak, 2022). Therefore, major media organisations that have sent journalists to Ukraine to cover the bombings, violence and refugee crisis have taken special measures against fake news and propaganda content (New York Times, 2022). Even in the media of Kosovo this event has become top news, not only for its global importance, but also because of the geopolitical context of the area. Namely, regardless of the geographical distance from the war, the still-unresolved conflict with Serbia and its ties with Russia give reasons for constant concern regarding the stability of Kosovo.

While five of the six Western Balkan countries support Ukraine and have imposed sanctions on Russia, Serbia is the only one not to have harmonised its foreign policy with that of the European Union, despite it being in the process of membership negotiations (Taylor and Trkanjec, 2022). Yet, Kosovo continues not to be recognised by five EU Member States and is opposed by Russia and China in the UN Security Council.[1] For this reason, on 9 September 2010 the UN General Assembly adopted a resolution in which it accepted the Advisory Opinion of the International Court of Justice (ICJ) on the legality of Kosovo's independence and welcomed the EU's willingness to facilitate dialogue between Kosovo and Serbia (UN, 2022). While this dialogue started in 2011, it has not yet been concluded due to the opposing positions held by the parties. Belgrade continues to refuse to recognise Kosovo, while Prishtina does not accept any compromise that would violate its constitutional order. Meanwhile, in an attempt to justify the invasion of Ukraine, Russian President Vladimir Putin has used Kosovo as a precedent, referring to NATO's intervention in 1999 (Tharoor, 2022). This trend has increased insecurity in Kosovo, even though researchers explain that there

[1] *Spain, Romania, Slovakia, Greece and Cyprus are five EU member states that have not yet recognised Kosovo's independence that is declared on 17 February 2008, while its membership in the UN continues to be opposed by Russia and China, which are permanent members of the Security Council.*

is actually little similarity between Kosovo and Ukraine. "... It is imperative to emphasize the difference between a limited, third-party intervention amid a state-sponsored campaign of ethnic cleansing – as was the case in Kosovo – and a calculated, full-on territorial invasion of a sovereign state for geo-political purposes – as in Ukraine", says Sidita Kushi, a professor of political sciences (2022). However, given the complex situation in the Western Balkans and the current tensions between Kosovo and Serbia, we evaluated the research concerning the media's agenda-setting role during the war in Ukraine, with a special interest not only in the media studies effect, but in the importance of this topic today as well. The aim of this article consists of examining the agenda-setting factors in a hybrid media system, concentrating on the role of television as the main source of information in times of crisis (Mehrabi, Hassan and Sham, 2009).

Theoretical perspective

Public opinion in democratic societies is primarily the result of what the media publishes. According to the Scottish philosopher Thomas Carlyle (2007), the term "fourth estate" was first used by Edmund Burke in a parliamentary debate in 1787, and refers to the influence and power of the media alongside three other powers: the legislative, the executive and the judiciary. Although today we have a more fragmented and polycentric media environment as an outcome of digital technology, the media's ability to dictate public attention has not changed (Grossman, 2022). The hybrid media system, which Chadwick (2017: 4) defines as "the interaction of old and new media logics", has altered media practices, audiences and the number of actors in political communication. According to that author, the model that shapes society today should avoid the idea of a passive audience and take into account the ability of "audience" activists to play a direct instrumental role in producing media content. Noting the systematic growth of the integration of the Internet and television, Chadwick (2017: 208) assesses that a "hybrid media system exhibits a balance between the older logics of transmission and reception and the newer logics of circulation, recirculation, and negotiation". Based on this hybridised reality, this research deals with the interaction of different factors in shaping how the Kosovar public perceives the war in Ukraine by using a unified theoretical framework that includes agenda setting and framing.

Agenda Setting and Framing

The media's ability to direct public attention to certain issues is explained in Agenda-Setting Theory, originally presented by Maxwell McCombs and

Donald Shaw in 1972. They combined two research methods to test agenda setting: a comparison of the media's agenda through analysis of news coverage with survey responses from the public, and "the findings showed that the media may not succeed in influencing what the public thinks, but they are very successful in influencing what the public thinks about" (Wanta and Alkazemi, 2017). Borrowing Walter Lippman's (1922) phrase "the picture in our heads", McCombs (2011) argues that the agenda of issues presented by the media affects the picture we will associate with those issues. These mental images are exactly where agenda setting and framing converge. In their study "The Convergence of Agenda Setting and Framing", McCombs and Ghanem claim that the second level of agenda setting – attributes and framing – are synonymous concepts that complement each other. Attribute agenda setting explicitly integrates the theory with framing research. The major focal points of framing research, frames, the process of framing and framing effects are, respectively, attribute agendas, the dynamics of the agenda-setting process, including its contingent conditions, and agenda-setting influence or effects (McCombs and Ghanem, 2001: 69). Yet, while agenda setting is limited to issues and events that are important (salience), framing constructs the media reality. According to the researchers, framing is the construction of an agenda with a limited number of thematically related attributes to create a coherent picture of events or special issues. Therefore, to explain agenda setting in Kosovo, the study focuses on *affective* attributes (positive, neutral, negative), but not *cognitive* ones (Wanta and Mikusova, 2010). Framing does not focus on the issues or topics that are chosen for coverage by the media, but on the specific ways in which they are presented (Scheufele and Tewskbury, 2007). Since the topic of the research is an international conflict with potential effects in Kosovo, the agenda of attributes in media reporting is evident through the negative portrayal of Russia, the labelling of the military intervention in Ukraine as an aggression, the denunciation of the tendency to link it with NATO's intervention in 1999, and its main source – the Western media. Considering that "the first level of agenda setting is the transmission of object salience, and the second level is the transmission of attribute salience" (McCombs and Ghanem, 2001: 68), in the research they are measured through the position of reports in news editions and attribute categorisation. However, the media is not the sole factor influencing the public agenda. This means that the public agenda is not created linearly, but is affected by social and psychological factors. In Kosovo, this means that the public's perception of the war in Ukraine is a result of the historical context of the long-running conflict with Serbia, the fact that this conflict is still unsettled[2], and

2 The Kosovo–Serbia dialogue with the mediation of the EU has not yet been concluded with a legally binding agreement on the normalisation of relations.

Russia's continued opposition to Kosovo's independence. Given that the transformation of the media environment has enabled the public to have a substantial impact on agenda building and news framing, through social media activity citizens help determine what is newsworthy (Moy, Tewksbury and Rivke, 2016). Thus, considering that in times of crisis people return to television more due to its credibility (Mehrabi, Hassan and Sham, 2009) and because "the hybrid media system constantly requires judgments and interventions regarding which medium is more appropriate to communicate a political event or process" (Chadwick, 2017: 22), this research analyses the content and reporting of Kosovo's television stations in the context of *inter media agenda setting*.

Intermedia agenda setting

While the Internet and especially the Web 2.0 technology has brought a revolutionary change in communication with the "hegemony" of social platforms (Statista, 2023) and "citizen journalism", television continues to maintain its dominance by being able to *adapt* (Cela, 2015; Chadwick, 2017: 45). According to researchers, the Internet has dictated a new model of television because the new possibilities enabled by retroactive consumption and an on-demand audience (VOD) facilitate a completely different approach compared to classic television. Television has not lost its audience, but its audience is increasingly migrating to the online environment (Ciacu and Tanase, 2012). Kosovo is on the same trajectory and television continues to be the most trusted media type (Zeneli, 2021: 141), while Facebook is the most frequently used social media (Datareportal, 2023). Still, despite the great impact of the Internet on users due to its volume and interactive nature, it is impossible to measure this impact outside of interactions with traditional media. Studies show that Internet users depend strongly on online traditional media sites, especially while seeking information on current events (Margolis and Resnick, 2000: 113). The Internet can therefore be used to examine *intermedia* agenda setting – the impact of online media on traditional media, and vice versa. Even though social media are more accessible, faster and more popular among young people, elite newspapers like The New York Times in the United States are the most important *intermedia agenda setters* (Vonbun et al., 2016). In relation to major events, the increase in competition between media organisations promotes intermedia agenda setting because, in order not to contradict the expectations of the audience, they follow and mutually influence each other. According to them, neither online media nor television are *faster*, they are also more likely to be monitored by other journalists and more likely to be agenda-setters. Meanwhile, if we take account of the factors that determine the media agenda such as *news sources* (representatives of institutions, politicians, public figures etc.), *the professional norms held by journalists*, *the ideological positions* of the media and their *influences* on each other (McCombs and Gahnem, 2001), then *intermedia agenda setting* in Kosovo gives support for the view that "in the hybrid media system shows that the agenda of different types of media are often homogeneous, highly interdependent and self-referential. As a result, a common national agenda still appears to exist, especially for high salience issues" (Langer and Gruber, 2021). Thus, despite the differentiation of the audience in terms of its use of varying types of media, salience, attributes and framing are the components that constitute the mechanism of their influence on the public agenda.

Methodology[3]

This study analyses the effects of the media on the Kosovar public regarding the war in Ukraine and the way of television reporting on the crisis before and after the invasion. The geopolitical context, continuous mentioning of Kosovo by Moscow in an attempt to justify the aggression, and the still unresolved conflict with Serbia, an ally of Russia, make research on the impact of the war on Kosovo very valuable. The fact that public perception is the result of being exposed to different types of media led us to determine that we needed primary data from citizen surveys, whereas for the research on television reporting we collected data arising from the monitoring of central news editions. We chose television, given that "in times of crisis people turn to television more" (Eddy and Fletcher, 2022) and in Kosovo television continues to be the most reliable source of information (Zeneli, 2021: 141). As a result, for the empirical level a combined methodology including a questionnaire, monitoring, data analysis, and desk research was used. The questionnaire was designed to allow respondents to give more than one answer to questions related to the Russia–Ukraine war, the type of media they relied on to be informed, and their assessment of the quality of media reporting on the war. Based on data from the Kosovo Statistics Agency (KSA, 2021), in order to ensure a representative sample 1,312 citizens were surveyed, divided according to Kosovo's seven regions: Prishtina with 354 respondents, Prizren with 254, Peja with 171, Mitrovica with 149, Gjilan with 135, Ferizaj with 132 and Gjakova with 117. The number of respondents in the regions was determined in proportion to the number of households in those regions; for instance, Prishtina with 198,897

[3] *Second-year students at the Department of Journalism of the University of Prishtina "Hasan Prishtina" were involved in this research by administering the questionnaire in seven regions of Kosovo and thus deserve special thanks.*

households has 354 respondents, Prizren with 177,742 households has 254 respondents and so on.

Table 1: DEMOGRAPHIC CHARACTERISTICS OF RESPONDENTS

	Total no. of respondents: 1,312	100%
SEX		
Female	586	44.7
Male	695	53.0
Valid	1,281	97.7
Missing	31	2.3
AGE		
18–25	392	29.9
26–35	204	15.5
36–45	215	16.4
46–55	228	17.4
56–65	171	13.0
Over 60	93	7.1
Valid	1,303	99.3
Missing	9	0.7
RESIDENCE		
Urban	512	39.0
Rural	797	60.7
Valid	1,309	99.8
Missing	3	0.2
EDUCATION		
Elementary school	157	12.0
High school	527	40.2
University	555	42.3
None	53	4.0
Valid	1,292	98.5
Missing	20	1.5

Source: The survey conducted for this study.

The survey was carried out in April and May 2022, while for the data processing and analysis we used SPSS Statistics 21. We based the monitoring method on the main criteria of the Agenda-Setting Theory: position and length of the story. As McCombs and Shaw state, "prominence in the television news format is defined by placement as one of the first three news items or any discussion which lasted more than 45 seconds" (Griffin, 2013: 380). In addition to the three main news in news editions, by categorising the content as positive, negative or neutral, the framing effect of TV channels was measured. To determine the media agenda, central news editions were analysed on the public television broadcaster RTK (News) and four commercial televisions: KTV (Evening News), RTV21 (21 Live News), Klan Kosova (News 20:00) and T7 (Central News). The research sample encompassed 270 main news editions between 1 February and 31 March 2022. In order to identify how the agenda of Kosovo's televisions had changed, it was decided to monitor the main news editions before and after the start of the war in Ukraine. The questionnaire was administered a few weeks later after we had monitored the TV news editions with a view to understanding how the TV reporting had impacted the audience's perceptions. Building on the research questions about the media agenda–public agenda relationship in Kosovo regarding the war in Ukraine, we posited the following hypotheses:

H1: The greater the importance of an event, the stronger the influence of television news in setting the public agenda concerning it.

H2: The demographic characteristics of the audience in Kosovo are not a determining factor for the effects of television reporting on the war in Ukraine.

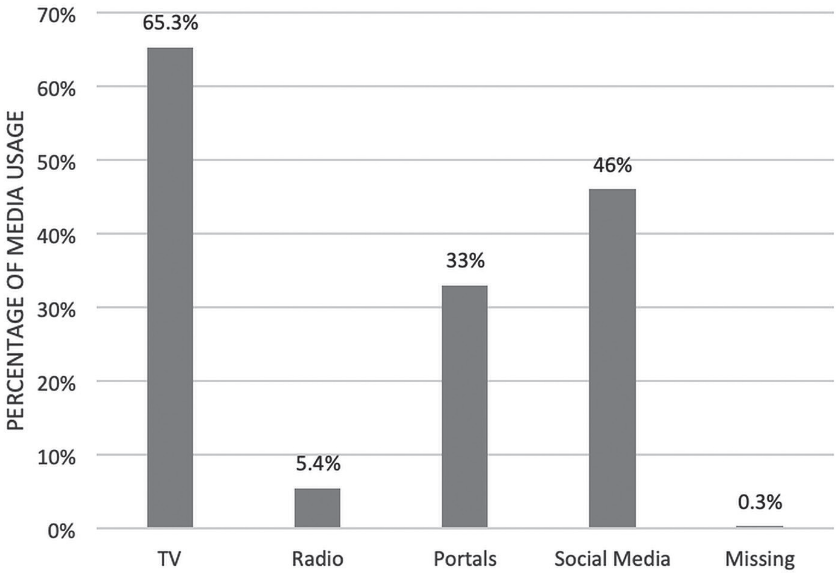
Analysis of the findings

The majority of Kosovo citizens rely on television to be informed about the war in Ukraine. In the question on their source of information, respondents could choose more than one option. Out of 1,312 respondents in the country's 7 regions, 65.3% indicated that they were informed by television, 46% by social media, 33% by portals and only 5.4% by radio. These figures confirm that in a hybrid media environment the audience tends to use different media types at the same time.

Figure 1 reveals the growing use of social media in Kosovo, while according to Zeneli (2021: 141) television is the most reliable source, calling for an explanation of the effects based on the *intermedia agenda setting* concept.

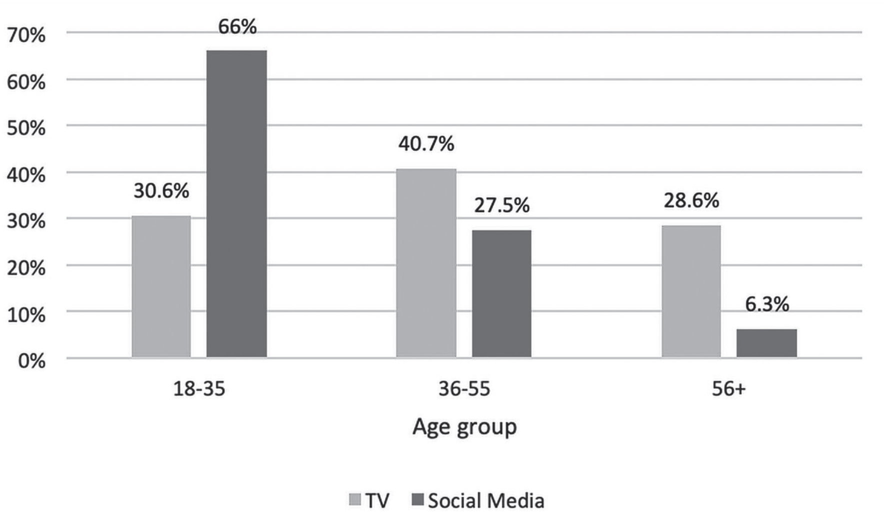
Although data show a continuous rise in social media use by the audience in Kosovo (the Datareportal (2023) reports 2017–2023), insufficient data are available to be able to compare the use of these media from generation to generation. Figure 2 displays differences in how media were being used by different generations in 2022.

Figure 1: SOURCES OF INFORMATION ABOUT THE WAR IN UKRAINE



Source: Own survey conducted for this study.

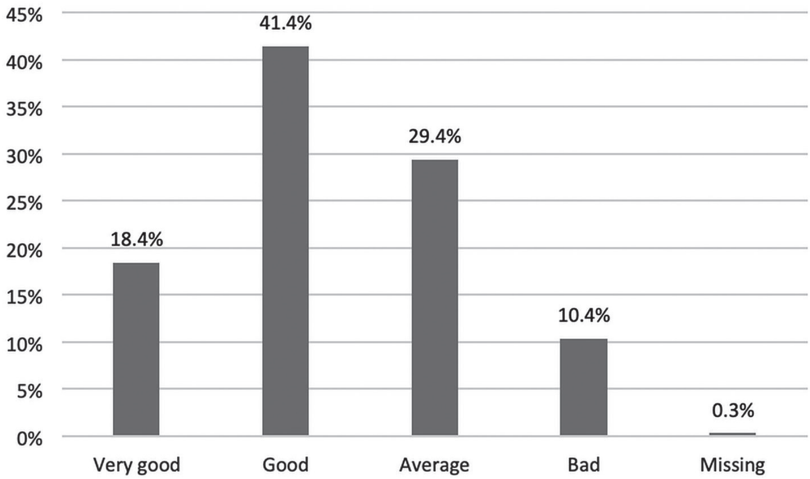
Figure 2: MEDIA USAGE WITHIN DIFFERENT GENERATIONS IN 2022



Source: Own survey conducted for this study.

Meanwhile, as far as media reporting is concerned, the majority of citizens expressed their satisfaction, evaluating it as “good” (41.5%) and “very good” (18.4%). The remainder (30%) gave an ‘average’ rating and just 10.4% of them rated it as “bad”.

Figure 3: CITIZENS’ ASSESSMENTS OF KOSOVO MEDIA REPORTING ON THE WAR IN UKRAINE



Source: Own survey conducted for this study.

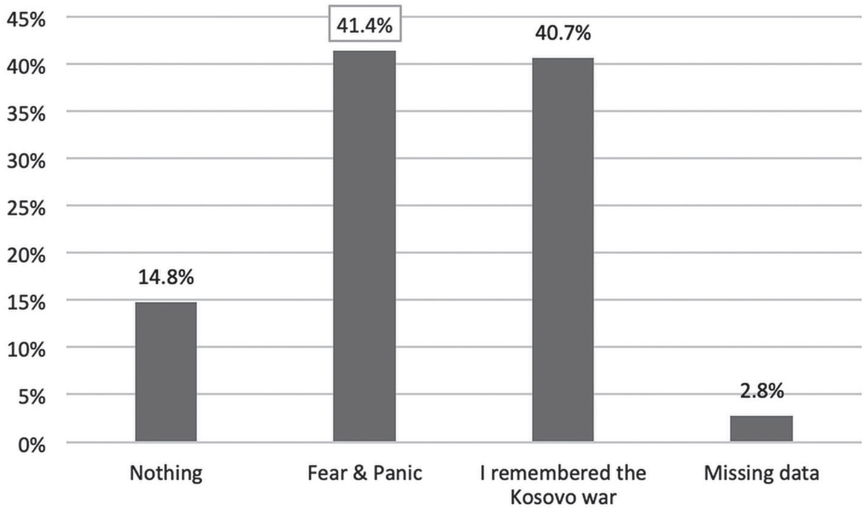
The formation of public opinion in Kosovo confirms McCombs’ assertion that the effect of the media depends on people’s need for orientation. The survey results also show that citizens’ perception of the media reporting is congruent with the results of monitoring the reported content, not only as concerns the volume of exposure and importance of the topics, but also with the attributes the media ascribes to the issues on which it reports. Among the 716 news reports on these television stations, 61% were directly related to the war in Ukraine, while the rest dealt with the effects of the war in Kosovo, mainly economic ones, such as the higher prices of certain products. However, as McCombs notes, the media is never the only factor that determines the public agenda. The media sets the agenda only when citizens perceive its reports (news stories) to be relevant (McCombs, 2011). In this sense, public opinion in Kosovo is the outcome of the socio-political context, which also includes the official positions in politics, the influence of the unresolved conflict with Russia’s ally, Serbia, and the influence of the attitude to the Western powers, which the citizens see as the saviours of Kosovo.[4]

[4] *This perception is the result of NATO’s military intervention (March–June 1999) that ended the war in Kosovo.*

The effects of media reporting on citizens of Kosovo

Media reporting on the war in Ukraine has brought back memories to the citizens of the Kosovo war and caused the fear of a new one. When asked about what feelings were caused by the news about the war in Ukraine, 40.8% of respondents expressed that they remembered the horrors of the war in Kosovo, 41.4% felt fear and panic, while only 14.9% answered "nothing". The fear of the possibility of a new conflict developing in Kosovo is also stressed by the analysis and opinions of foreign organisations and researchers, linking it to Russia's interest in shifting international attention away from its aggression in Ukraine (McBride, 2022; Dragas, 2022).

Figure 4: EFFECTS ON SOCIETY CAUSED BY KOSOVAR MEDIA REPORTING ON THE WAR IN UKRAINE



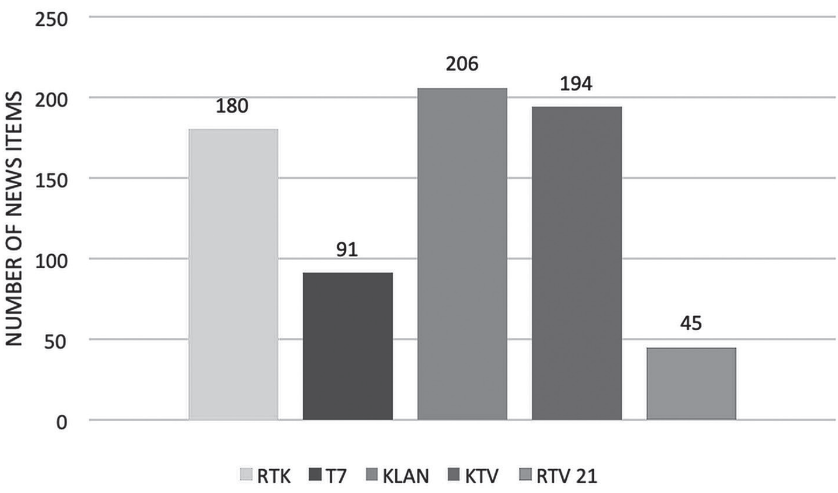
Source: Own survey conducted for this study.

Media reporting has caused fear and panic among some citizens, while the majority of respondents (58.9%) who declared that they were afraid of a new war are aged 18–25, namely, young people who did not experience the last war in Kosovo. In this age group, female respondents (65.9%) and those from urban areas (62.6%) expressed greater fear. Education does not seem to be decisive in whether citizens are influenced by media reporting because respondents with a higher level of education (university) answered that they are more afraid (64.1%) than respondents who had only completed secondary school (58.6%). Meanwhile, the age group in which media reporting created the lowest amount of fear and panic is respondents over 65 years old, the generation that was in their forties during the last war in Kosovo.

Further, the biggest share of those who stated that they remembered the Kosovo war were in the age groups over 65 (62.4%) and 46–55 (61%). Naturally, the share is greater among these age groups compared to young people (18–25 years old) who did not experience the war. Still, some (17.6%) young respondents said that the media images and reports about the war in Ukraine had reminded them of the war in Kosovo since they had heard from family members about many events that happened in Kosovo in the 1990s, learned at school about them, read about them in books or watched documentaries or seen theatre performances. Over 70% of these young people came from rural areas, which were the most affected during the last war in Kosovo.

Kosovo television stations have given different amounts of space to news items about the crisis and Russia's invasion of Ukraine. During the monitoring period (1 February – 31 March), the highest number of news stories was recorded from the start of the war until mid March. Of the 270 news editions of the five main television channels that were analysed, Klan Kosova had the most news broadcasts (206), followed by KTV with 194, then RTK with 180.

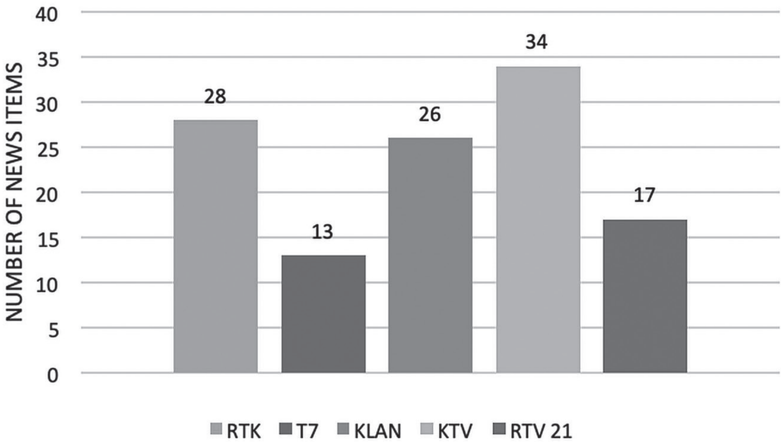
Figure 5: THE NUMBER OF NEWS ITEMS ABOUT THE WAR IN UKRAINE BETWEEN 1 FEBRUARY AND 31 MARCH 2022



Source: Own survey conducted for this study.

Using Agenda-Setting Theory, news editions were analysed based on ranking (position), attributes, and news sources. Among the five television stations, KTV most often listed Ukraine in the top three news items (34 times), followed by RTK (28 times), Klan Kosova (26 times), RTV21 (17 times) and T7 (13 times). In 44% of the news editions, news about the war in Ukraine or its effects in other countries was listed in the top three news items.

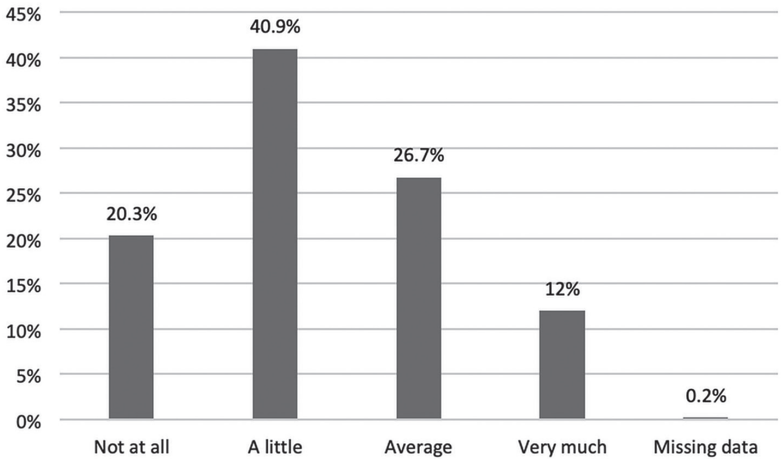
Figure 6: "AGENDA SETTING": WAR IN UKRAINE, AMONG THE TOP THREE NEWS ITEMS IN THE NEWS EDITIONS



Source: Own survey conducted for this study.

As concerns the attributes that Kosovar media have given to these news stories, pro-Ukraine and anti-Russia reporting completely dominates, with the former portraying the latter as the aggressor. Further, regarding the sources used for reporting on the war in Ukraine, in most cases Kosovar television channels have relied on Western media: AP, CNN, Reuters and BBC. The considerable attention and orientation of Kosovo's media to the war in Ukraine, alongside deriving from attitudes formed as a result of historical circumstances against Serbia, also reflect the experience that Kosovo has undergone in attracting the attention of the world's media. As Balabanova (2007: 53) notes, "the kind of human tragedy that the Kosovo conflict has produced – with the ranks of refugees, ethnic conflict and even genocide (according to some), along with the backlash provoked by international military involvement, was potentially the kind of news that would attract the attention of the media. This raised questions about the possible role of the media in exposing the conflict and in developing policy responses". In this context, exposure to the conflict in Ukraine has caused a great deal of concern among Kosovo citizens regarding the risk of the war expanding. When asked how much television reporting had influenced their concern with the risk of the war expanding to the Balkans, only 20.3% of respondents indicated that it had *not* influenced them *at all*. The share of citizens who have been *greatly influenced* corresponds to the share of citizens who feel *very* afraid (10%) of the risk of a new conflict developing in Kosovo, confirming the effect of repeated exposure to the same topic.

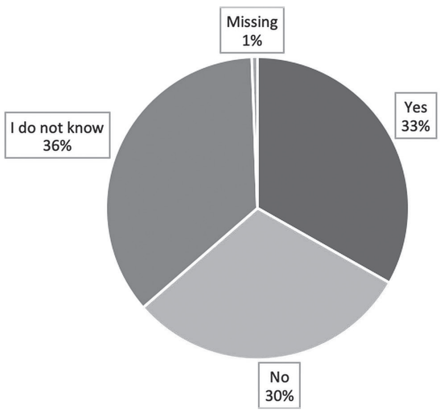
Figure 7: PUBLIC FEAR OF THE RISK OF A NEW CONFLICT IN KOSOVO



Source: Own survey conducted for this study.

However, opinions on the risk of a new conflict emerging in Kosovo were proportionally divided: 33.2% believed that such a risk exists, 30.4% believed that there is no risk, while 35.8% answered "I don't know". The relatively low level of public fear can be explained by the professional media reporting and messages from Western officials that have ruled out the risk of a new conflict developing in the Balkans (RTK 2022).

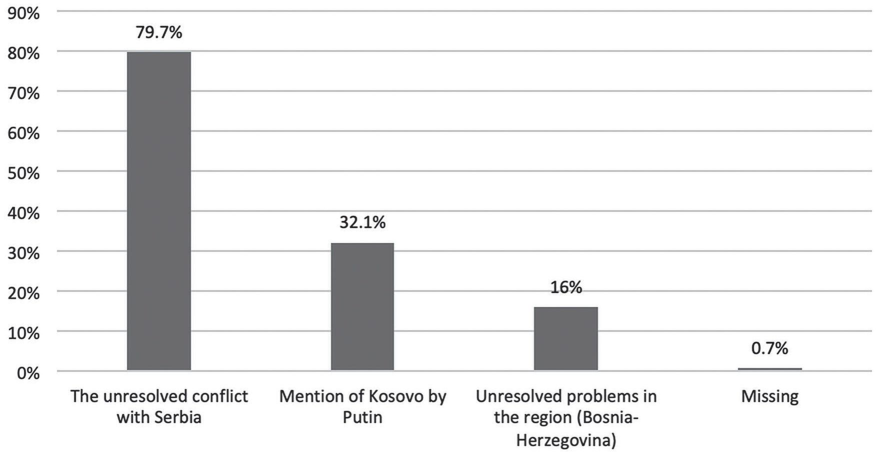
Figure 8: PUBLIC PERCEPTION OF THE RISK OF A NEW CONFLICT DEVELOPING IN KOSOVO



Source: Own survey conducted for this study.

In response to the question concerning what might bring the threat of a new war in Kosovo, the majority of citizens (54.3%) referred to the unresolved conflict with Serbia, some (14.8%) mentioned the references by Putin to Kosovo, a smaller share (6.8%) highlighted the unsettled problems in the region, while the rest gave answers by combining the options: the unresolved conflict with Serbia and the mentions of Kosovo by Putin (14.1%), and the unsettled conflict with Serbia and problems in the region (6%).

Figure 9 – FACTORS THAT THREATEN A NEW WAR IN KOSOVO



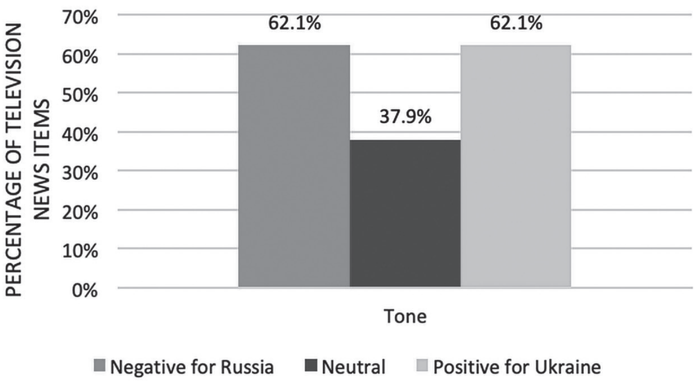
Source: Own survey conducted for this study.

The culprit for the war

Another finding of the study is that international media sources have dominated in the reporting by Kosovar television stations, as well as the narrative that blames Russia for the war in Ukraine: 62.1% of news items had a negative tone for Russia and a positive tone for Ukraine, whereas 37.9% of news items had a neutral tone.

While Russia's image in the discourse of Kosovo's media establishments before the invasion of Ukraine varied between favourable and unfavourable reporting (Mavraj and Tahiri, 2019), in the view of the citizens this approach changed after the invasion when 86.4% of respondents considered Russia to be responsible for the war, with 69.8% rating the television reporting as good or very good. The intersection of these findings proves that the framing of the television stations concerning the war in Ukraine generally reflects the perceptions held by the citizens of Kosovo, which is an outcome of Russia's attitude to the state of Kosovo and Russia's friendly relations with Serbia.

Figure 10: TONE OF THE REPORTING IN TELEVISION



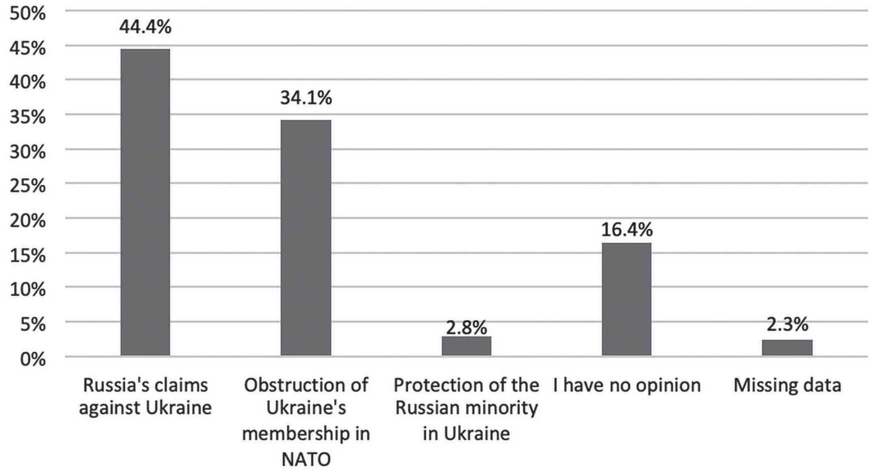
Source: Own survey conducted for this study.

Figure 11: THE CULPRIT FOR THE WAR IN UKRAINE

Source: Own survey conducted for this study.

Moreover, as regards the causes that led to the beginning of the war, 44.4% of citizens believed that they relate to Russia's claims against Ukraine, 34.1% to the obstruction of Ukraine's membership in NATO, while just 2.8% see the need to protect the Russian minority in Ukraine as the cause of the war. Nevertheless, 16.4% stated that they held no opinion, and 2.3% of the answers were missing.

Figure 12: REASONS FOR THE START OF THE WAR IN UKRAINE



Source: Own survey conducted for this study.

The mentioned results confirm the effects related to the second level of Agenda-Setting, i.e., the attributes that the media ascribes to the issues it reports on, influencing the public's perception of those issues. A comparison with the data obtained from the questionnaire shows the share of citizens who assessed the media reporting as bad is almost the same as the share that believed Russia is not to blame for the war. Here, we must account of the possible effects of the wide social media use and the circulation of misinformation online. According to a report by the fact-checking platform *hibrid.info* and the Journalism Department of the University of Prishtina published in March 2022, in the period just from 24 February to 11 March, 38 pieces of disinformation and incorrect content were identified, albeit the authors accept that the number may be much higher. Most of this content was produced outside of Kosovo in languages other than Albanian, translated and then distributed by online media in text, photo, video or a combined form. Social media, dominated by Facebook (with more than 50% of disseminated content) and followed by Twitter, Instagram and YouTube, are the channels most frequently used for disseminating misinformation (Osmani and Zeneli, 2022). A number of these items of disinformation have linked the war in Ukraine with the context of Kosovo, meaning that such framing has been able to influence the audience to a certain extent. For this reason, within the framework of the sanctions against Russia and to prevent propaganda Kosovo has temporarily banned the broadcasting of media originating from the Russian Federation (IMC, 2022).

Conclusions

Television continues to be the biggest source of information for the citizens of Kosovo, who have positively evaluated the media reporting on the war in Ukraine. The effects of this reporting are *cumulative*, which means they are the result of consistent media coverage and other factors that determine the political context. Cumulative effects are caused by consistent and repeated media coverage over time: If the majority of media outlets report repeatedly and consistently on certain topics, people have little chance of avoiding that information (Peter, 2004; Koch and Arendt, 2017). According to McCombs and Show (1972), cumulative effects are limited to cognitive (beliefs and the acquisition of attitudes) and affective (emotional reactions) effects. Agenda-Setting is therefore a cumulative effect arising from the ongoing relationship between the media and the public. Since Kosovo is no exception in terms of changes in the media environment, and considering the rise in the number of actors acting as agenda-setters following the emergence of digital technology, setting the agenda should be seen as intermedia agenda setting, even though research shows that television continues play the dominant role here (McCombs and Gahnem, 2001).

The war in Ukraine is an important event for the Kosovar public due to the political context and the economic crisis that has ensued and has dominated the television agenda in Kosovo. The research results show that television has been the main source of information about the war in Ukraine, while the 59.1% of news items negatively framing Russia during its reporting corresponds to the opinion held by the citizens about the culprit for the war. This confirms the first hypothesis of this study. According to the findings of the questionnaire, the absolute majority of citizens believe that the media reporting has brought back memories of the war in Kosovo (40.8%), especially for those in the 65+ age group.

The second hypothesis is partially supported because the effects of television reporting vary based on the audience's demographic characteristics (gender, age, education, settlement). As for the feeling caused by the news items about the war in Ukraine, fear was found to be higher among women (42.7%) than men (28%), while the result based on age, education and place of residence was similar. Further, regarding the risk of a new conflict developing in Kosovo, the effects of the reporting vary by the audience's age, education, gender and residence. The results show that young people aged 18–35 (52.2%), those less educated – pre-university education (60.9%), women (57.9%) and those from urban areas (48.3%) believed that there is no risk of a new conflict. The data obtained during the television monitoring (716 new items in 59 days, 44% of which appeared were listed in the top three stories in news editions) also show that the agenda of Kosovar media was translated into the public agenda (86.4% of citizens saw Russia as being responsible for the war). Given that, with 18.7%, social media was the second-most used source, the contents shared about the war in Ukraine have generally been in line with those of television. Therefore, despite the nature and ease of disseminating misinformation and fake news, social media have not hindered the effects of the media's Agenda-Setting. Moreover, based on the findings concerning the second level of Agenda Setting (the attributes that the media has ascribed to the news about the war in Ukraine) the almost complete dominance of pro-Ukraine reporting, as also reflected by the main sources of Kosovo television programmes (AP, Reuters, CNN, BBC), can be explained by the dominant attitude among citizens (86.4%) who consider Russia to be guilty for having started the war. On the other hand, they are divided over the perception of the risk of a new war developing in Kosovo (33.2% believed there is a risk, 30.4% believed there is no risk, 35.8% answered "I don't know"). Regarding the factors that pose a threat, most respondents singled out the unresolved conflict with Serbia (54.3%) and the continuous mentioning of Kosovo by Putin (14.8%).

Even the data collected during desk research show the pro-Ukrainian attitude of politicians and the public, not as a result of Kosovo's ties with that country[5] but because of what Russia has represented in the context of the war and the state building of Kosovo. Immediately after the invasion, the government of Kosovo imposed sanctions on Russia in line with the EU and USA's sanctions (Gazeta Express, 2022) and stood in solidarity with Ukraine by sheltering journalists who had been forced to leave their country (Reuters, 2022). Citizens have also shown their solidarity with Ukraine through various initiatives to help the citizens of that country (Zeqiri, 2023).

However, this research also has some limitations. These mainly relate to the lack of monitoring of online media as it is another important source of information for Kosovar citizens. Another limitation refers to social media and the impossibility of measuring the effects caused by using them due to the large volume involved and their interactive nature with traditional media. While the exclusion of online media in the research was a consequence of the lack of archives in most mainstream online media outlets, making it impossible in this research to monitor the contents published during the analysed period, the effects of social media cannot be measured outside of their interaction with traditional media. Accordingly, noting the growing use of social media and so as to achieve the most complete research results, future research on this topic should aim to include online media and more rigorously measure the interaction of social media with traditional media.

[5] *Ukraine is among the countries that have yet to recognise the Republic of Kosovo, which means that Kosovo and Ukraine do not even have diplomatic relations.*

Still, this article may be useful as an attempt to explain the effects of media reporting in a particular political context. Namely, despite its limitations, the article will contribute to the local literature on media effects studies given that this topic has not received adequate attention thus far.

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*Arash BEIDOLLAHKHANI**

THE REGULARITY OF POLITICAL SCIENCE IN SOUTH KOREAN AND TAIWAN ACADEMIC CONTEXTS: REASONS AND CONSEQUENCES

Abstract. *The democratisation and economic growth of the Asian Tigers, specifically South Korea and Taiwan, brought structural changes to the academic systems of these countries, particularly in the fields of political science and international relations. The article aims to provide a comprehensive and hybrid view on the regularity of political science in the academic environments (university systems) of East Asian countries with a focus on South Korea and Taiwan through the observational analysis method and a historical-sociological mechanism. The findings are summarised, where it is argued that the pentagonal democratic citizenship system (legal, political, cultural, social, economic) as well as the establishing of structural and updated political-economic relations with the main powers in the international system are the two crtitcial factors that have contributed to the adjustment of political science in East Asian countries, including South Korea and Taiwan. The article concludes that, along with the international and domestic developments in South Korea and Taiwan, political science underwent structural changes and is becoming more regulated and structured.*

Keywords: *South Korea, Taiwan, political science, democracy, institution*

Introduction

The interaction and development of political science and international relations in the academic systems of East Asian countries together with economic and democratic development has created strong academic foundations and regular mechanisms for political science and international

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relations in these countries. This has also led to the establishing of viable links with the government system and its various parts. Most systematic developments in the academic systems of East Asian countries generally, and political science in particular, have been influenced by the Western/American academic system. For decades, East Asian countries, including South Korea, considered political science and international relations as a multidisciplinary science based on immutable theoretical rules and generalities. In South Korea, for example, a practical and theoretical practice during the rule of the authoritarian regime was to justify the actions of the ruling system. The war between the two Koreas entailed deregulation and scientific backwardness in international relations and political science. The unpleasant experience of the Korean War created a very ideological environment in Korean politics, which in turn created huge ideological constraints for the scholars researching political science and international relations. Moreover, researchers in the fields of international relations and political science had to justify the laws and policies of General Park's authoritarian military regime, which considered itself to hold democratic legitimacy. The infrastructure and orientation of academic fields in South Korea, notably political science research and international relations, were highly influenced by the development of the democratisation process and industrialisation in South Korea. In Taiwan, however, after Chiang Kai-shek's rise to power as leader of the Nationalist Party of Taiwan (Kuomintang), the spread of Taiwanese nationalist sentiment, as well as Taiwan's military and political weakness against the Chinese Communist Party, political science and international relations was oriented towards the world system and the convergence of their communication and mechanisms with the international system, liberal democracy, and Western academic development. This, along with Taiwan's need to build international diplomatic, political and military support against China, led to the development of political science and international relations.

Adopting the historical sociology method and field-descriptive observation, the present study examines the evolution and regularity of political science and international relations in two countries in East Asia: South Korea and Taiwan. Structural foundation and regularity in this study mean that departments of Political Science and International Relations in Taiwan and South Korea are characterised by a well-reorganised system pursuing a certain agenda and direction in their academic programmes and research projects. Accordingly, the educational and research programmes of the academic systems must emphasise regularity and convergence with domestic and international developments based on the national interests of these countries. This order creates a structural connection between the governing system, the elite, and the academics involved.

The presented study examines the Centre for International Relations at Taiwan University of Political Science (Chengchi National University) and the Department of Political Science and International Studies (Korean National Academy of Studies) based on observational real-life experiences. Adopting a macro-analytical (observational-experimental) perspective, two important components in the structural foundation and regularity of the political science and international relations in South Korea and Taiwan were examined. Based on several examples and evidence, these factors are discussed below.

In this study, the two mentioned important factors include the development of democratic citizenship (legal, political, cultural, social, economic) and structural and updated scientific relations with the main centres of power, wealth and science in the world. It is argued that, like other interdisciplinary disciplines, scientific progress and regularity in political science depend on infrastructural developments in macro-national goals, the rules of the political game, governance, the expansion of democracy, establishing permanent links with the major centres of generating regional and global wealth and power, and joining the globalisation and internationalisation processes. These two factors have ensured the regularity and importance of political science and international relations in the universities of Taiwan and South Korea. Based on the system of citizenship democracy and democratic elitism in East Asia, the views of professionals on the orientation of the country's macro-policies in the political and international field are respected, while classroom and university activities follow the direction of updated changes in domestic and international politics. This means that through various international developments in the economic and political arenas on the regional and global levels the operating system will change and update the agenda and direction taken by political science and international relations. Accordingly, in a practical-scientific and democratic context scholars and researchers in these fields attempt to combine and coordinate their national interests with the interests of the world system in academic and political areas. Moreover, the internal-external relations, as well as the systemic system (input, input-output, output), coupled with the ideas derived from it in the East Asian bureaucracy, continue to transform their domestic and foreign policy systems. Thus, in both South Korea and Taiwan, various national and international policy centres maintain strategic relationships with academic centres in the international system, and international and domestic decision-making is based on a macro-policy-academic consensus and a continuous and convergent two-way structure with both fields directly affecting each other. This continuous and democratic structure yields a macro consensus on the key components of national interests, assisting countries while pursuing their foreign policy (political, academic, and elitist consensus-oriented vs. popular politics).

Morphology of South Korea's domestic and foreign policy

The Republic of Korea, or South Korea, is today a vibrant and structured democracy in East Asia. It is structure-oriented since institutional structures have been established following the democratic processes in this country. South Korea's political power is distributed across the executive, legislature and judicial branches. This country's democratic transition in 1987 was based on a long process. Four important concepts must be considered while seeking to understand and analyse South Korea's domestic and foreign policies academically and practically; namely:

1. The alliance with North Korea
2. The rapid economic development
3. Democratisation or the democratisation process
4. The alliance with the USA

Since the Republic of Korea was founded in 1948, an influential factor in its politics has been its view of North Korea. During the Cold War, authoritarian government leaders often used the rivalry with communist North Korea as a way of weakening domestic dissent. After the Cold War, nationalism spread in Korea, and friendship with North Korea increased among those who regarded this country as part of the mainland in modern times, especially following the presidency of Kim Dae-Jung and Roh Moo-Hyun (Snyder, 2018).

The development of South Korea between 1962 and 1972 under the military government of General Park Chung-hee led to some controversial issues. On one hand, after South Korea joined the Asian Tigers and succeeded in developing industrialisation and creating a strong and development-oriented government led by Park, the country became a member of the Organisation for Economic Cooperation and Development (OECD). On the other hand, Park's 19-year dictatorship caused South Korea's political backwardness from democracies despite its rapid economic development (Kim, 2021).

The collapse of the dictatorial military regime and the insecurity of South Korea's political climate after the 1980s led to the opening up of the electoral arena, the growth of democracy after 1987, the expansion of civilian control over the military, and the growth of civil society. The large movement of university students and intellectuals, as well as the emergence of a middle class and other civil society groups, had a role of triggering democratisation in South Korea (Chiavacci et al., 2020). The USA played a critical role in the institutionalisation, economic development, democratisation and expansion of South Korea's national security during the early stages of South Korea's economic and political development. Some South Korean politicians and academicians question the crucial role of the USA in their country's success and deny Washington's key role in South Korea's domestic and foreign policy. However, many academic elites, especially in the fields of political science and international relations, believe that South Korea's success would not have been possible without the USA. Accordingly, Americanism (US support) was established as a dominant current in the academic institutions of political science and international relations in South Korea.

The co-incidence of the democratisation of Korea with the development and regularity of political science to deal with issues of national interest

The collapse of the Soviet Union and start of the democratisation process in South Korea in the 1980s and 1990s, along with the democratisation of communist regimes in Eastern Europe and subsequent collapse of the East–West divide, created the conditions for Korean political scientists and academicians to force anti-communist ideas out of Korean universities. Following the democratisation of Korea, researchers in political science were no longer worried about various security issues such as the fear of researching on specific domestic and foreign issues. In other words, normal conditions prevailed for political studies in Korean universities after the 1990s. These conditions led to the further institutionalisation of political science (its connection with the evolution of the governing system in South Korea and their mutual interaction) and an increase in studies in this field. Thus, democratisation played an important role in the quantitative and qualitative development of political science and international relations in South Korea. Research trends in political science during the authoritarian period and after the 1990s are quite different, and further research was conducted on electoral processes, party studies, legislative studies etc. Prior to democratisation, discussions focused on state-centered theories, justifications of government actions, and regional or national issues that had nothing to do with Korean national interests; yet, after democratisation, the focus of studies shifted towards national interests and problematic issues facing Korean society. A good example of the differences in the focus of studies before and after the country's democratisation is electoral studies. Prior to democratisation, elections were merely a symbolic attempt to legitimise the authoritarian and totalitarian regime in South Korea. Electoral manipulation was rampant at the time and the security concerns of political scientists meant they were reluctant to do election studies. Due to the repressive atmosphere in authoritarian regimes, there was no inclination among the people to vote, and voters often opted for options supported by the ruling regime under the influence of government propaganda. However, after the 1990s electoral studies became more widespread, with electoral study chairs being established at universities across Korea (Wong, 2005). For ten years (2003–2013), 27.8% of all articles submitted to the Korean Journal of Political Science were focused on election-related discussions and topics.

In addition, 10% of all submitted articles was related to political parties and the National Assembly. A further 40% of articles was concerned with political trends and political and administrative reforms in Korea (Kang, 2016). This trend in academic research suggests democratic progress in South Korea. With the gradual establishment of democracy, free elections have expanded simultaneously, and it has become very difficult to predict election outcomes due to their democratic nature. In this period, studies on the relationship between the government and the market also grew rapidly (Park & Wilding, 2016). During the rule of the authoritarian regime, studies mostly evaluated and analysed the developmental state of the country, economic liberalisation, neoliberalism, labour policy etc. Korea's growing involvement in economic issues has led to more studies on political economy. With the expansion of the processes of globalisation and their impact on Korea, studies on globalisation and the welfare state have also expanded ever since 1998 (Isozaki, 2019), and from the 2000s onwards the Korean government has sent a large number of political science graduates to welfare countries, including Sweden, Norway, Germany, Greece and the United Kingdom to investigate the pros and cons of the welfare state model.

Along with Korea's technological growth in recent years and the shift of its economy from an industrial to a service/technology economy, studies by political scientists and researchers have addressed the information revolution, technological and Internet policies, federalism, and minorities, ethnic conflicts around the world, globalisation, economic reforms, regional integration etc. After 2003, during the presidency of Roh Moo-Hyun studies of the information age and new technologies in political science and the impact of the Internet on politics expanded exponentially, particularly following the development of the technology economy in Korea (Chu, 2016). This growth in studies was due to the Internet's impact on Korean election outcomes and electoral campaigns. In 2002, Internet groups played a key role in Mr Hyun's presidential victory, while the Fandom Volunteer Organisation created the 'Nosamo movement' on the Internet that led to Mr Hyun's victory in the presidential election. This issue drew researchers' further attention to the impact of the Internet and social networks on electoral processes. After young Korean girls were fatally struck by an armored US military vehicle in 2002, and after the USA sent infected American cows to Korea in 2008, some anti-US protests were started via the Internet that caused researchers to pay even greater attention to studies of the Internet and cyberspace.

A further area of research that expanded following Korea's democratisation was North Korean studies. Before Korea became a democracy, it was very difficult to focus on North Korean studies and all information and knowledge about North Korea was available merely to security and military officials, making research very difficult for civilian researchers due to ideological constraints (Doucette, 2006). The expansion of studies on North Korea after democratisation increased opportunities for improving the relations between the two Koreas. These studies gave opportunities for the negotiation and establishment of the Sunshine policy during Kim Dae Jung's presidency in the 2000s, which led to formal meetings and extensive talks between the two countries' leaders and strengthened the relationship of the two Koreas. These studies led to the formation of the Ministry of Unity in South Korea, which aims to reunite the two Koreas and develop close relations between these countries (Choi, 2012). Studies on North Korea gradually drew the attention of Korean researchers to issues related to neighbouring countries such as China, Japan etc., motivating them to address numerous research aspects of ordinary people's lives in those countries. Before this period, the focus of the research was on security issues, but then other aspects of research, including culture, economics, politics etc., were studied as well. This led to the creation of specialised departments for regional research in South Korea. Some universities such as Dongguk University, Hankuk University of Foreign Studies, Myongji University, Ewha Womans University and Kyungnam University established specialised departments for regional and North Korean studies.

As regional studies on North Korea, China and Japan expanded, so did the study of US domestic and international policy processes, with many scholars turning to American studies, resulting in the creation of specialised departments of American studies. The Korean government sent many students majoring in political science and international relations to the USA to perform research on the internal and external processes and policy structure in America. This was mainly done due to the fundamental role of the USA in South Korea's domestic and foreign policy. In addition, to expand the sphere of its influence in South Korean domestic policy in the 1980s, 1990s and 2000s, the USA admitted many Korean students to American universities through various cultural programmes, including the Fulbright education programme. Currently, most of the graduates of these programmes form the administrative, political, academic, economic and cultural bodies of the South Korean government.

The democratisation of Europe, especially Eastern Europe, as well as the issue of the integration of European countries into the European Union and the mechanisms of its success attracted greater attention and focus from Korean government and researchers to Europe. After 1999 and 2000, the number of European studies at Korean universities increased, mainly addressing the EU's legal mechanisms, welfare states, electoral policies, economic policies etc. Moreover, Korean and European universities established bilateral academic interactions through various programmes, including Erasmus. Since then, a number of Korean students on different levels, especially undergraduates, have been sent every year to a range of European universities. In return, European students study for one or two semesters at Korean universities (Shin, 2012). The Korean government also contributed to the establishment of the ASEAN programme to develop plans for studying Southeast Asian countries. The Korean Association of Southeast Asian Studies was established in 1991 and in recent years, with the expansion of the Korean government's economic and political relations with these countries, the focus has been placed on cultural, political, societal and historical issues. In the last few years, another issue attracting the attention of Korean researchers has been immigration. The presence of Sino-Korean minorities, refugees, and workers who have migrated to Korea from various countries, like North Korea, has seen Korean researchers focus more on immigration issues. South Korea is essentially an anti-immigrant society, and political, legal and cultural processes are all structured in terms of anti-immigration and intolerance of immigrants. Despite these rules, there is a rising number of immigrants, which has prompted Korean researchers to delve into immigration issues, while ever more pressure has been put on the Korean legislature and institutions to change the basic civil laws concerning the presence of foreign immigrants (Feinman, 2021).

As mentioned above, democratisation facilitated Korean political studies and improved the quantity and quality of political science and relevant studies. These developments are responsible for political scientists' fundamental contribution to institutional policymaking processes. Currently, the important departments of political science, international relations, and regional studies have strong links with government agencies. Many graduates of political science and holding similar majors actively cooperate and contribute to various policymaking processes (Kim, 2008).

Impact of democracy and international interactions on the regularity of political science and international relations in South Korean academic centres: The case of the Academy of Korean Studies

Alongside economic development, an important goal of South Korea is to rebuild the culture and branding of the Korean people. Today, most countries are familiar with Korean culture through the Korean wave (Hallyu), and Korean music, cinema and art have found many fans around the world (BeidollahKhani, 2019). The Korean government has adopted a number of strategies for cultural expansion since the 1950s and 1960s. The expansion of Korean studies with an emphasis on understanding the culture, art, politics and society of this country has been among these strategies. To this end, a specialised-academic centre for Korean studies was established in 1978. This academy is a research and educational centre with different departments, and the majors and research studies of this centre are based on Korean studies and understanding of different aspects of Korean culture and politics. Joint research is conducted annually at this centre with several universities across Korea and internationally, and different foreign students and researchers attend the centre to research and study various aspects of Korea, including the politics, culture, society etc. The Humanities Department at this centre includes the Department of History, Diplomacy, Philosophy, and Korean Language and Literature. The Department of Culture and Art consists of Folklore and Ethnography, Anthropology, Religion Studies, Musicology, Art History, Human Geography, and Cultural Technology. The Department of Social Sciences consists of Political Science and International Relations, Economics, Sociology, Ethnicity and Nationalism, and Education (Beidollahkhani and Kahrazeh, 2021). The Department of Global Studies is made up of the Department of Korean Culture and Society (The Academy of Korean Studies, 2019). Students and researchers working in these departments often receive scholarships from the Korean government or attend the centre through various academic and research exchange programmes. The Department of Political Science and International Relations, through the Korea Studies Promotion Service Centre, which conducts international cooperation, annually attracts dozens of prominent researchers for the Korean Studies Scholarship-Research Programme. These researchers study international and domestic issues of the Korean government, and their housing costs are paid in full by the Korean government. The centre's research funding is often provided by the Korean government or large Korean companies. The Korean government offers various financial incentives to researchers from other countries and encourages them to produce numerous publications on Korean culture and politics, as well as its foreign policy, after they have completed their studies and returned to their home country. There is an attempt to build international academic collaboration to expand Korean studies worldwide, and the world's major universities receive financial and mental support from this centre to conduct Korean research. More than half the research opportunities and scholarships of this centre under bilateral or multilateral agreements are allocated to American researchers or researchers from countries with developed economies (including Germany, England, Sweden, Chile, China, Japan, Brazil etc.). The centre also admits researchers from countries who possess strong economic ties with Korea.

The information exchange and interaction of Korean students with the foreign researchers present in this centre facilitates novel experiences and ideas, which will bring in new mechanisms for Korea. Most of the research studies in this centre are published in the form of international articles and books in collaboration with Korean researchers, and this is helping to develop scientific research among Korean researchers and students. In addition, these collaborations provide opportunities for Korean professors and researchers to travel and visit various scientific and research centres in other countries. This continuous scientific exchange will lead to the expansion and updating of the Korean government's systems of governance and foreign relations, including the continuity of their development, by enhancing its positive reputation and improving its cultural and international image.

Taiwan: ambiguous status and international recognition

Taiwan is generally regarded as a de facto entity. Its citizens and a number of small governments recognise the region as the Republic of China. China considers it Taiwan and a part and province of China. For the World Bank, this region is the separate customs territory of Taiwan, Penghu, Kinmen and Matsu, whereas in most countries it is known as Taiwan (Fell, 2018).

After the end of Japan's colonial rule in 1945 and withdrawal of the nationalist government to Taiwan and Taipei in 1949, ruled by the Kuomintang nationalist party Taiwan was transformed from a single-party system to the liberal democracy of Asia and from a poor country to a beneficiary of globalisation and economic development. The USA and the People's Republic of China have not been able to agree on the international status of Taiwan. Different political groups in Taiwan hold a range of views on mainland China. In recent years, with the rise of China's economic and military power around the world, the Taiwan Nationalist Party has adopted a policy of detente in its relations with China (Copper, 2016). This policy was adopted by the Taiwanese for 8 years (2008–2016) with the aim of achieving historical reconciliation, national identity, regional independence, and differentiating the Taiwanese liberal-democratic system from the Chinese socialist authoritarian system. Once tensions between China and the USA grew stronger in 2016, nationalist movements increased in Taiwan, while Taiwanese nationalists who sought independence found a more outstanding role in the Taiwanese government. The changing political, economic and diplomatic orientations in Taiwan have been influenced by several factors, including Japanese colonisation, the waves of immigration, and the Taiwanese diasporas on mainland China. Taipei's growing efforts to possess international recognition and a seat in the UN, the transformation of Taiwan's fascist regime to a liberal democracy, economic development, and the expansion of the national identity after the 1990s are among the factors that have affected Taiwanese studies of political science and international relations. Taiwan's political development may generally be divided into colonial, authoritarian, transition and democratic periods, whose history and foundations are analysed and structured according to Taiwan's connection to mainland China.

Taiwan's political science and political structure: transnational interactions and solidarity

Since the 1980s, Taiwan has experienced significant political and economic changes. On the domestic front, martial law was lifted, opposition parties were formed, free and popular elections were held, and the development-oriented government allowed economic and cultural exchanges with the People's Republic of China. Taiwan's democracy is strong than other democracies in East and Southeast Asia in that it possesses sound political institutions with sound and independent functioning, a free media, and fast-paced civil society. Taiwanese national identity possesses a civic nature and is rooted in the unique historical experience of democratic government institutions.

Currently, four major parties in Taiwan fundamentally contribute to Taiwan's domestic and foreign policymaking. These include the Democratic Progressive Party (DPP), Kuomintang (Taiwan National Party), the Taiwan Solidarity Union (TSU) and the People's First Party (PFP). While they lack sufficient ideological and intrinsic cohesion, they often agree on various issues. Taiwan's domestic and foreign policy is heavily affected by the international status of the Taiwan Strait and the USA's relationship with China. The status of this country in the international system and public opinion in Taiwan help different parties reach a consensus on domestic and foreign affairs (Lin, 2019b: 18–24). Several principles among Taiwanese parties assist them to establish a final consensus on the issues related to the national interests. These principles are rooted in domestic development and the interpretation and analysis of Taiwanese academic institutions of political science, affecting the political structure.

First, no political party in Taiwan accepts becoming part of China under its "one country, two systems" policy (Cabestan, 2017). All Taiwanese agree that the government should strive to ensure Taiwan's independence in the international system. Accordingly, to win political campaigns, some rival parties accuse each other of surrendering to Beijing (Hickey, 2013).

Second, except for the Independence Party of the Taiwan Solidarity Union, the other Taiwanese parties are striving to stop China's provocation as the only foreign power that can pose a serious obstacle to the formation of an independent state of Taiwan (Friedman, 2006). Taiwanese presidents thus often try to reduce their pro-independence rhetoric. Since 2000, Taiwanese parties and the President of Taiwan have pledged that the country will not declare its independence from China until China uses military force against it (Lin, 2019a).

Third, all Taiwanese political parties are working to establish and maintain a close and friendly relationship with the USA. For them, the US government is one of Taiwan's most important partners and the only foreign force to protect Taiwan in the case of China invading and therefore plays an important role in Taiwan's independence (Clark, 2010). Considering the importance of the USA in Taiwan's domestic and international decision-making and policymaking, Taiwanese political parties seek to strain their rival parties' relationship with the USA and sometimes accuse each other of being too dependent on the USA (Stockton, 2008).

Fourth, Taiwanese political parties favour various forms of practical diplomacy. For example, Taiwanese lawmakers often argue over which diplomatic allies Taiwan needs. According to them, Taiwan needs formal diplomatic allies and, to this end, Taiwan's dollar diplomacy against China must evolve (Lee, 2019). By 2018, Taiwan had only established official diplomatic relations with 16 countries. Most of these countries are small, underdeveloped states in Central America and the Pacific, including Belize and Nauru (Horton, 2019). After the inauguration of Ms Tsai Ing-wen of the Democratic Progressive Party, politicians from different parties all tried to strengthen informal relations with countries that have official relations with China (Bing, 2017). In this regard, Taiwan, with the support of the USA, has established economic and trade offices around the world to achieve its diplomatic goals in many countries.

Finally, Taiwan's economic growth is a matter of consensus among all political parties in Taiwan, and they cooperate to facilitate the transactions of Taiwanese companies with companies abroad (Yap, 2012).

Considering the challenges that Taiwan faces to achieve international recognition, scholars and researchers in political science and international relations have focused on expanding the discussions on foreign policy and international relations. Accordingly, while one-third of Taiwanese professors specialise in international relations, about two-thirds of the published papers, doctoral and master's theses, and research works address policy issues, foreign affairs, and international relations (Ho and Kao, 2002). The influence of American academia and American thought has seen the role of market forces in Taiwanese universities increase. The close connection of the Taiwanese government and its various institutions with universities has triggered the expansion of several demand-driven topics in both foreign and domestic policy at universities (Chang, 2005). More than two-thirds of scholars in political science and international relations in Taiwan are graduates of American universities, and most specialised departments follow the principles of American discourses in political science and international relations.

Together with the expansion of industrial policies in East Asia, especially Japan and Korea, and Taiwan's economic growth, researchers at Taiwan's major universities concentrated on industrial policy, institutionalisation strategies, and the role of government in economic and political development (Rigger, 2002). Following two decades of industrial development and economic growth, party democracy emerged in Taiwan in the early 1990s. Influenced by the democratisation of various government institutions, academic institutions also shifted their research focus to democratic studies and neoliberal, economic, and political patterns (Chung, 2002). The expansion of democracy, the growth of civic identity, the rise of people seeking independence, economic growth, the expansion of the middle class in Taiwan, and international legal and foreign-policy issues were among the key aspects that altered the focus of research in political science and international relations in Taiwan. In the 2000s, hundreds of Taiwanese returned to Taiwan after having graduated from American universities, with most becoming employed at different Taiwanese universities or in the public service of the government (Chan, 2000). Like South Korea, a considerable share of Taiwanese government elites has studied at American universities via various cultural and academic programmes, notably the Fulbright programme, and this elitisation of Taiwan students by American universities has caused an institutional change in the views, perspectives and orientations of Taiwanese government institutions.

Prior to the 1970s and 1980s, universities held a limited role in the development of Taiwan. However, after then the role of students and their movements in decision-making processes increased. The structural and deep connection of the policy elites with the universities and the organic connection of the university institutions with the country's administrative body strengthened the links between university structures and Taiwanese institutions. This, together with the growth of the middle class in Taiwan, gave rise to the issue of Taiwanese identity and independence, expanding the institutional and international perspective in Taiwan's political science and international relations. The soft, academic influence of the American attitude in Taiwanese universities changed the structural foundations of the universities in Taiwan, resulting in the international structure and orientation of the foundations of Taiwanese universities (Stockton and Yeh, 2019). Taiwan's important universities have been cooperating extensively with universities of high standing around the world, including US, European and East Asian universities. This continuous cooperation has led to the consideration and incorporation of important factors and issues of national interest into the system and policymaking of the Taiwanese government (Heilbron et al., 2018). In the next section, the role played by one of the most important academic institutions in Taiwan is analysed to examine the country's institutional outlook, strategic development, international orientation, and focus on national interests.

The liberal democracy in Taiwan and converging of political science and international relations with domestic and international developments: The case of the Institute of International Relations, National Chengchi University

Most of Taiwan's universities enjoy high international rankings. Taiwan National University is the best university in the country, ranking 25th in Asia and 76th in the world in the QS World University Rankings. Some other Taiwanese universities, including National Tsing Hua University, National Cheng Kung University, National Chiao Tung University, and Taiwan National University of Science and Technology rank well in the International and Asian university rankings. Most of these universities conduct joint projects with international scholars in research and international institutions. Apart from these universities, Academia Sinica, the most preeminent academic institution of Taiwan, provides support for research studies in several fields. Academia Sinica has several research institutes and annually offers various research programmes and projects for domestic and international scholars in different fields, especially basic sciences and engineering, as well as the humanities and social sciences. This institute also offers several doctoral and postdoctoral research programmes for researchers working in the fields of the natural sciences and geology, engineering, agriculture, medical sciences etc. The academy is run directly by the President of Taiwan and conducts joint projects with foreign institutions, including Harvard University and European research institutes.

In the current study, the spotlight is placed on National Chengchi University as the most important university for training elites to work in the public service of Taiwan. Chengchi National University, or the National University of Politics and Governance, was first established in Nanjing, mainland China, as a specialised school of public affairs and governance for the Chinese Nationalist Party, and then in 1927 was relocated to Taipei. It is the first and earliest university in the Republic of China (when China was ruled by Chiang Kai-shek as the leader of the nationalists) and Taiwan, which specialises in the humanities, social sciences, and the arts, and is the leader in the fields of political science and international relations, as well as bureaucracy and governance-related fields, including governance affairs, politics, international and regional studies, management, economics, media, language etc. In traditional Mandarin Chinese, namely the official language of Taiwan, Chengchi means governance or politics. With the expansion of the University in Taipei in 1953, the Association of International Relations was founded. At first, this association aimed to perform a wealth of investigations on the Chinese Communist Party and different international affairs for the Taiwanese government and the Kuomintang Party. In 1961, the association changed its title to the Institute of International Relations. After that, the Institute increased its links with domestic and international institutions through functional mechanisms. In 1996, the Institute of International Relations became affiliated with National Chengchi University and officially became part of it. The Institute currently has 44 staff divided into 4 research centres. These research centres primarily work on American and European studies, Asia-Pacific studies, Taiwan and Chinese social and academic studies, and Chinese politics. The Institute has established links and cooperation with numerous institutions overseas, especially those in the USA and various institutions and universities in mainland China (Institute of International Relations, 2015). The Institute serves as Taiwan's main strategic research centre on domestic and international affairs and offers professional advice to the Taiwanese government and other institutions, including the Council for Security Cooperation in the Asia-Pacific (CSCAP). In addition, several seminars and conferences on bilateral issues related to Taiwan and the Asia-Pacific, European countries, the USA etc. are held annually. Most of the Institute's professors and experts have worked in or advised the bodies of the Taiwanese government. The current president of Taiwan, Ms Tsai Ing-wen, was a student and then a professor in the Department of Law at Chengchi University and also a researcher at the Institute.

Along with the expansion of democratic processes in Taiwan, the role of the Institute in the Taiwanese government has become more prominent, while its extensive links with overseas agencies have grown rapidly. The guests and speakers invited to the Institute are usually officials from other countries, including foreign ministers, diplomats, and even presidents. Chengchi University annually invites people, including winners of the annual Nobel Prizes, in the humanities and social fields, also economics, literature etc., to give lectures at the university. As mentioned above, the Taiwanese democratic system promotes an international and cooperative approach to achieving the main goal of the Taiwan government – a gradual and soft movement toward international recognition – and Chengchi University is working to establish the infrastructure, provide the requirements, and facilitate the conditions to achieve this goal. In the governing structure of Taiwan, the employment of academics, specialists and professionals in government positions is important, while most Taiwanese cabinet ministers hold doctorates from notable universities around the world with no or little political and party background (Yip So, 2015). Most of these individuals are outside the party system and rent, and their political knowledge and independence help them deal with crises away from political and party relations and the time-consuming patronage and bureaucratic hierarchical structure. To train such elites, the Institute fosters international interaction and access to first-hand information and data on important issues concerning Taiwan and other important regions of the world. The performance of the Institute and the budget spent have yielded positive democratic and specialised mechanisms in Taiwan. Through academic exchange programmes, the researchers and scholars invited to this centre offer necessary guidance to the Taiwanese government and its elites and assist the Taiwanese government to adopt a comparative view and scientifically update the fields of political science and international relations in an international context.

Conclusion

The primary focus of this article was to identify the positive consequences of a democratic approach to government and the benefits associated with organic and natural cohesion and solidarity between political science and international relations in an academic context and international developments in South Korea and Taiwan. As was noted, the structural connections of political science with the global science and economy and the connection of democratisation processes with the historical and political developments of Taiwan and South Korea have brought about a renewal of political science and its development and regularity as well as its practical applications in governance and politics. The dominance of democratic processes, along with transnational relations with the international system and numerous economic and cultural agencies overseas, have resulted in the systematic dynamics of political science and international relations and their strategic contribution to domestic and foreign policy. The USA has had a significant impact on the academic structures of Korea and Taiwan, while many domestic and foreign developments in these countries, including academic reform in politics and international relations and their well-organised structure and inherent order, have been influenced by American universities. Accordingly, the channel linking these countries to the international system and their democratic and economic developments is structured on an international basis. Political science is closely connected to policymaking at home and overseas through a functional mechanism. It holds domestic and international significance and the developments are often directed and controlled by the academic elites among political science and international relations. The development and structural regularity of political science in democratic contexts and its qualitative and quantitative development along with the economic growth of South Korea and Taiwan have led to political science and international relations being regarded as specialised, functional and institutional. Benefits may hence arise from structuring the rules of political science based on a functional and democratic view, as well as academic environments' establishment of institutional and strategic links with countries, currents and important channels of the global economic system. These processes and developments have attracted the international recognition of South Korean and Taiwan universities, and their prominent role in training various political, economic, social and cultural elites for policymaking. These elites help to assure the economic growth and development of these countries while creating balance and stability in their domestic and foreign policy decisions.

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*Eva ERJAVEC, Tjaša REDEK**

IMPACT OF DIGITALISATION AND INVESTMENTS IN INTANGIBLE CAPITAL ON THE NON-FINANCIAL PERFORMANCE OF FIRMS IN SLOVENIA**

Abstract. *Article examines the impact of digitalisation and intangible capital investment on the non-financial performance of firms in Slovenia. Article examines the relationship between: (1) digitalisation and firms' non-financial performance; (2) digitalisation and firms' attitude to digitalisation; (3) investments in intangible capital and firms' non-financial performance; where we (4) also expect differences by industry and between firms operating in global value chains. Considering survey data, the SEM approach shows that, digitalisation and intangible investment both have positive effects on non-financial performance. Level of digitalisation depends on the importance attributed to digitalisation, whereas the importance of digitalisation depends on the expected long-term benefits of digitalisation for the firm. Level of digitalisation is dependent on the anticipated long-term benefits of digitalisation. These have a positive, yet non-significant impact on a firm's level of digitalisation. Despite business agility having an impact on the importance of digitalisation for businesses that is less than the expected benefits, it is still highly significant. Other results were not statistically significant.*

Keywords: *intangible capital, digitalisation, firm performance*

Introduction

In the last decade, competition and the growing digitalisation of the economy have led companies to focus on investments in intangibles such as intellectual property, human capital, digitalisation and others because these

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investments provide companies with competitive advantages. Empirical research confirms the many benefits of new technologies (Corrado and Hulten, 2010; Gómez and Vargas, 2012; Lane, 1991) that are expected to bring significant positive effects, notably increased productivity (Andrews et al., 2018; Fitzgerald et al., 2013).

The impact of adopting new technologies is often closely linked to the motivation for adopting them. Short-term impacts focus on efficiency gains occurring by way of increased speed, adaptability/flexibility in production, traceability and product quality, standardisation of processes, reduced associated costs and delivery times, more efficient management of business processes, a smaller administrative burden, and others (Škare and Soriano, 2021; Vázquez-Bustelo et al., 2007). More detailed data on the structure of intangible investment reveal that intangible investment is also partly related to the adoption of new technologies (OECD, 2022).

Moreover, the new economy is ever more knowledge-based and relies on intangible capital. Following the well-established definition of intangible capital by Corrado (2006), we distinguish three categories of it, namely: (1) computerised information; (2) innovative property; and (3) economic competencies. Early estimates showed that intangible capital accounts for up to one-quarter of total productivity growth (Corrado et al., 2009; Fukao et al., 2009; Piekkola, 2011; Roth, 2020; Roth and Thum, 2013).

The objective of this article is to investigate the impact of digitalisation and intangible capital investment on firms' non-financial performance. To that end, the article examines the relationships between digitalisation and firms' non-financial performance, and between intangible capital investments and firms' non-financial performance.

The analysis is based on survey data from Slovenian companies. Structural equation modelling (SEM) with the Stata package SEM was used to evaluate the conceptual model. The results primarily show that, as anticipated, the influence of the level of digitalisation (H1) and intangible investments on non-financial performance (H2) are both positive and statistically significant. As expected (H3), digitisation depends on the importance attributed to digitalisation by the firm (proxied by perceived strategic importance) and the importance of digitalisation depends on its expected long-term benefits for the firm (H4). Business agility has a positive impact on the importance of digitalisation for firms (H6). Although the impact is lower than the impact of the expected benefits, it remains highly significant. The results also show that the impact of trade participation on the importance of digitalisation is positive, yet relatively weak and also not significant (H5). Similarly, the results show that the influence of trade participation on the importance of digitalisation is positive, albeit quite weak, and also not significant (H5).

The article makes several original contributions to the literature. First, it is one of the earliest empirical analyses to examine the combined effect of intangible investment and digitalisation on firms' non-financial performance (Erjavec and Redek, 2022). Second, it is the first work for Slovenia establishing a link between attitudes to digitialisation and the level of digitalisation implemented. Third, the study also examines the relationship between the degree of the firm's globalisation and the level of its digitisation.

The article is structured as follows. A review of existing literature and theory on digitalisation, intangible capital, and firm performance is initially presented. The second section describes the empirical analysis (methodology, data description, descriptive statistics, hypothesis testing). A discussion and a conclusion then follow.

Literature review and development of hypotheses

The framework for this study is the impact of digitalisation and investment in intangible capital on the non-financial performance of firms. Productivity is influenced by many factors, with some stemming from the economic environment and others from companies themselves. Productivity determinants can be broadly divided into internal (resource allocation, amount and structure of capital, human capital, competencies, trainings etc.) and external factors (business, institutional, macroeconomic and technological environment, international exchange, exchange rates etc.) (Redek et al., 2019).

Digitalisation and the adoption of new technologies are some of the key factors for accelerating growth in productivity (Ahmad and Murray, 2019; Parviainen et al., 2017; Škare and Soriano, 2021). Digitalisation is part of the new, fourth industrial revolution. The fourth industrial revolution may be defined as progress in: (1) physical capital; (2) digital technologies; and (3) developments in the field of biology, with numerous technologies encompassing the aforementioned elements (Bettiol et al., 2019; B. Čater et al., 2019b; T. Čater et al., 2021; Deloitte, 2015, 2018).

Digitalisation and the non-financial performance of companies

Firm performance can be measured with regard to both financial and non-financial aspects. Financial performance is understood as stock-market-based measures of financial returns (e.g., ROI, profitability, cash flow etc.) (Wagner, 2010). In addition, non-financial performance[1], which this article

[1] Kaplan and Norton (1992) first defined non-financial indicators as customer perspective measures, internal business perspective measures and innovation and learning perspective measures, alongside the financial perspective measures.

focuses on, can be observed via increased competitiveness, market share or market growth (Banker et al., 2000), consumer satisfaction (Anderson et al., 1994), product quality, increased innovation performance (Abdel-Maksoud et al., 2005), environmental performance and social performance (Abdel-Maksoud et al., 2010) and others (Maletič et al., 2021). The literature confirms that new technologies positively impact the performance of firms by improving both their short-term efficiency and long-term growth and competitiveness (Gao et al., 2012; Müller et al., 2018). Digital transformation generates additional revenue streams through new digital technologies (Chawla and Goyal, 2021), enables better customer service, more efficient operations, increases accuracy, quality, and speed, indirectly lowers costs and stimulates employment growth due to superior business operations and higher demand, in turn affecting both financial and non-financial performance (Andrews et al., 2018; Fitzgerald et al., 2013). Innovative combinations of technologies involved in the digital transformation process also improve non-financial performance (Bharadwaj et al., 2013), alongside those mentioned above, by improving old or customising new products and processes (Chawla and Goyal, 2021). New technologies are also mentioned as a solution to labour shortages caused by the ageing of labour markets in Europe (Prašnikar, Redek and Koman, 2017). Productivity gains are greater for firms that are already more productive (Berlingieri, 2018), although the gains from technology also rely on the type of technology (e.g., cloud computing is more beneficial for small firms as it means they do not need to invest in a large IT infrastructure) (Bloom and Pierri, 2018). Further, a study by Bettiol et al. (2019) of 1,149 Italian companies that examined seven key technologies (robotics, additive manufacturing, laser cutting, big data and cloud, 3D scanning, augmented reality, and IoT and intelligent products) relative to a firms' performance showed that new technologies like 3D printing, block chain and others have a positive impact on product innovation and hence on firms' performance (Menguc and Ozanne, 2005).

H1: Digitalisation (implementation of new technologies) has a positive impact on the non-financial performance of the firm.

Investments in intangible capital and company performance

Following Corrado's (2006) well-established definition of intangible capital, we distinguish three categories of intangibles: 1) computerised information, which comprises computer software and computerised databases; 2) innovative capital, which among others includes R&D, but also other innovative expenditure; and 3) economic competencies, which encompass brand equity, firm-specific human capital, and organisational structure[2]. As defined by Lev (2000), intangible capital has a positive impact on firm performance without being financially or physically embodied. Therefore, investments in intangibles bring companies certain competitive advantages in relatively (Khan et al., 2018). Intangible capital is becoming an ever more important source of productivity growth in the knowledge society. Early estimates revealed that intangible capital accounts for up to one-third of total productivity growth (Corrado et al., 2009a; Fukao et al., 2009; Roth, 2020; Roth and Thum, 2013; van Ark et al., 2009). The Corrado et al. (2009) study showed that the inclusion of intangible investment in the real output of the non-farm business sector increased the estimated growth rate of output per hour by 10%–20% relative to the baseline case which completely ignores such investment. Studies suggest that intangible investments have a positive effect on a firm's performance (Mansion and Bausch, 2020; Seo and Kim, 2020; Yadiati et al., 2019), despite significant differences in the intensity (Kaus et al., 2020) and contribution of intangible assets to company performance depending on the firm's size (Kostevc and Redek, 2021).

Intangible capital enhances firm performance (Corrado et al., 2017; Maggi, 2019; Piekkola and Rahko, 2020; Roth, 2020). Moreover, a firm's possession of intangible capital has been found to bring competitive advantages (Bianchi, 2017; Khan et al., 2018), with resources that are "intangible" named knowledge, invisible assets, absorptive capability (Levin et al., 1985), core competencies, strategic assets, core capabilities, intangible resources, organisational memory or any other denomination with a similar meaning and result in the non-financial performance of a firm such as: (1) value creation for customers; (2) rarity, in comparison to competence; (3) imitability; and (4) substitutability (Barney, 1991).

In Slovenia, intangible investment is still relatively weak. About 75% of microenterprises in 2020 had no intangible capital, compared to about 5% of large enterprises (Erjavec and Redek, 2022). Slovenian companies make almost 60% of all their investments on machinery and other equipment, significantly more than the European average (49%). Yet, Slovenian companies allocate only about 20% of all their investments to investments in intangible capital, which is considerably below the EU average of 36% (European Investment Bank, 2021). The lag behind the EU is also evident from data on

[2] *While digitalisation, focusing on new technology implementation, is often understood as a synonym for new technology implementation and the use of ICT, the delineation between digitalisation and intangible investments is quite clear. Intangible investments focus on »computerised information«, which comprises only software and databases, while digitalisation and new technology implementation is much broader and primarily encompasses a lot of tangible investments in new equipment and machinery. The two are not independent (Erjavec and Redek, 2022), which was also tested in this model, yet they should be distinguished.*

investments in ICT or software, databases, networks and online activities. Investments of this type account for just 7% of all investments, while the average company in the EU invests 13% (European Investment Bank, 2021).

The above discussion leads to our next hypothesis:

H2: Intangible investment will have a positive impact on non-financial performance of the firm.

Digitalisation and the company's attitude to digitalisation relative to its expected effects in the company

Firms assume that positive effects will flow from the introduction of new technologies, namely: (1) short-term impacts on business (often financial) performance; and (2) long-term, strategic advantages for companies resulting from new technologies such as increased productivity, the development of new business models (Hess et al., 2016), modular and cross-functional global strategies that enable business processes to be established beyond the boundaries of time, distance or function (Wheeler, 2002), and the provision of unique and integrated business functions (Sebastian et al., 2020), which are closely related to the above-mentioned non-financial performance (B. Čater et al., 2019b; Černe et al., 2017; Prašnikar, Redek and Koman, 2017). These expected positive impacts may be considered as factors or motivators that encourage companies to introduce new technologies. Among them, the most important factors or motives are the expected competitive advantage, the related strengthening of the market position and the growth of revenues and turnover (Čater et al., 2019b; Maravić et al., 2022). Studies reveal that technology brings more benefits on average, which strengthens the motivation to invest. Deloitte (2015) shows that 84% of companies in Switzerland agreed or strongly agreed that I4 technologies could significantly increase the country's competitiveness in global markets, while almost half the companies agreed or strongly agreed that digital transformation will slow down offshoring or outsourcing (mainly in countries with cheaper labour). Companies invest in certain assets because they anticipate positive outcomes, yet the environment can also force them to invest in order to protect and enhance their market position (Bavdaz and Redek, 2022; Maravić et al., 2022). A firms' attitude is strongly related to motives, which may be divided into: (1) proactive motives (i.e., profit and growth goals, technology competency, unique product, foreign market opportunities, market information, tax benefits, economies of scale (Coviello et al., 1998)); and (2) reactive motives (competitive pressures, overproduction, extending sales of seasonal products, proximity to international customers). Lin and Tang (2009) claim that technology innovation was considered to be most important by executives in the integrated circuit (0.277), communication (0.337), computer (0.385) and optoelectronic industries (0.422).

Llopis-Albert et al. (2021) studied the effect of a digital technology (DT) strategy on business performance models and stakeholder satisfaction in the auto industry. The authors suggest that a DT brings greater profits, productivity and competitiveness, again supporting the conclusion that expected enhanced performance is substantiated and can drive increased investment in technology. Several researchers (Farhoomand et al., 1990; Naicker and Van Der Merwe, 2018) studied managers' attitude to the potential positive effects of implementing novelties that are motivated by the perceived ease of use, usefulness, complexity and perceived cost, However, perceived risk is recognised as a key factor while deciding on the adoption of new technology. Moreover, improved flexibility and product quality influence a firm's intention to raise its level of technological sophistication (Abdel-Maksoud et al., 2010).

The discussion above leads to the following hypotheses:

H3: The importance of digitalisation in the firm (attitude to digitalisation) will have a positive effect on the level of digitalisation it implements.

H4: Expected long-run benefits from digitalisation will have a positive impact on the importance attributed to digitalisation by the firm.

H8: Expected long-run benefits of digitalisation will positively impact the level of digitalisation.

Differences by industry and between firms by engagement in global value chains

Firms heavily involved in international exchange must be more competitive to achieve a satisfactory performance. While digitalisation has become the standard for companies that wish to be competitive (Ahmad and Murray, 2019; Gal et al., 2019; Parviainen et al., 2017), firms that invest heavily in intangible capital (including new technologies) are recognised as those with more competitive advantages (Bajgar et al., 2021; Gómez and Vargas, 2012; Ilmakunnas and Piekkola, 2014). Proactive market strategies aim to strengthen a firm's competitiveness in a global context and ensure rapid economic development. Helpman et al. (2004) showed that only the most productive companies are able to serve global markets and do so through foreign subsidiaries. External sources of knowledge are an important aspect of innovation. More specifically, successful innovation is dependent on the creation and incorporation of new knowledge into the innovation process.

External sources will provide some of this knowledge to the firm. Firms that serve more developed markets collaborate more deeply with often more innovative and technologically advanced suppliers, and face more intense competition (Cassiman and Veugelers, 2006). A presence in global (developed) markets implies that connections with buyers, competitors or other sources of information (like scientific, commercial, technical journals) will come from more developed (better ideas) and thus more demanding markets (additional stimulus). The indirect impact on firm performance was found to be strong and significant (Prašnikar, Redek and Drenkovska, 2017).

There is accordingly a need to develop new products and systems, particularly in segments where the competition is relatively weak. R&D and innovative technologies have to be developed for performing innovation-orientation-driven activities. This focus on more radical innovation is consistent with proactive behaviour. Still, the environment provides both opportunities and restrictions (Levin et al., 1985). It has also been shown that productivity growth is maintained by organisational activity and related to global markets engagements and thus firms with international links have more intangible capital and their organisational work is more productive (Prašnikar, Redek and Drenkovska, 2017). New investments in organisational capital activities are therefore a path towards higher growth. This leads to our next hypothesis:

H5: Trade involvement will have a positive impact on digitalisation of the firm.

H7: Trade involvement will have a positive impact on a firm's non-financial performance.

Agility and non-financial performance

A recent study (Solheim et al., 2022) showed that the ability to increase agility depends on the use of digitalisation because it improves product solutions, increases the reach of new customers through digital channels, and brings benefits due to being better at digitalisation than the competition. Research analysing Hungarian companies revealed that those companies using a cyber-physical system, a cyber-physical production system and big data technologies were evaluated as having a higher level of logistic service, more efficient processes with their partners, improved cooperation between certain logistic functions, and being more competitive (Nagy et al., 2018). It was further found that digitalisation of internal company processes offers new and disruptive market opportunities for firms seeking to develop and launch innovations based on entrepreneurial ideas (Heirman and Clarysse, 2007; Kuester et al., 2018). A very thorough description of the benefits of introducing new technologies is provided by Mueller and his co-authors who classify the effects in four major groups: technical, economic, ecological and wider social (Müller et al., 2018).

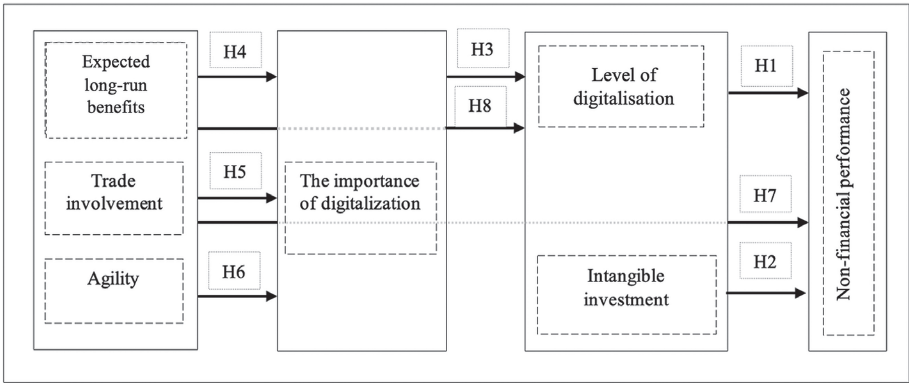
This leads to the following hypothesis:

H6: The agility of a firm will have a positive impact on the importance attributed to digitalisation by the firm.

Conceptual model of the relationship between digitalisation, intangible investment and firm performance

Figure 1 presents the conceptual model and summarises the links between the variables of interest as presented in the hypotheses.

Figure 1: CONCEPTUAL MODEL OF THE RELATIONSHIP BETWEEN DIGITALISATION, INTANGIBLE INVESTMENTS AND PERFORMANCE



Source: own.

The model hypothesises the following based on the literature. First, it is contended that a higher level of digitalisation has a positive impact on the non-financial performance of firms and that intangible investments also have a positive impact on non-financial performance. Second, the importance of digitalisation in the company (attitude to digitalisation) has a positive impact on the level of digitalisation, while the expectation of long-term benefit arising from digitalisation has a positive impact on the importance attributed to digitalisation by the company. We assume that the expectation of a long-term benefit of digitalisation additionally has a positive impact on the level of digitalisation. Next, involvement in international exchange has a positive impact on the importance of digitalisation and on non-financial performance. We contend that firm agility has a positive impact on the importance attributed to digitalisation by a firm.

Empirical analysis

Methodology

Data were collected using a questionnaire containing 31 questions, where 28 were substantive in nature and 3 concerned the respondent. The content of the questionnaire was based on several different sources (B. Čater et al., 2019a; Deloitte, 2015; Domadenik et al., 2019; Gao et al., 2012; Maravić et al., 2022; Müller et al., 2018; Prašnikar, 2010; Prašnikar, Redek and Drenkovska, 2017; Statistični urad Republike Slovenije, 2019). The questionnaire was divided into several substantive sections[3]: (1) general information about the company where information about the firm was collected; (2) features of digitalisation; (3) digitalisation factors; (4) analysis of obstacles to digitalisation; (5) innovativeness of the company; (6) investments in intangible capital; (7) effects of digitisation; (8) strategic aspects and digitisation; and (9) the role of the state. The latent variables used in this analysis were formed based on several items from the following analyses: (1) level of digitalisation is based on a new scale, although motivated by two existing scales, adapted based on two sources Čater et al. (2019) and Deloitte (2015); (2) non-financial performance was based on Mueller et al. (2018), as confirmed by other sources (T. Čater et al., 2021; Maravić et al., 2022). Agility and intangible investments were based on the Globalinto project (Caloghirou et al., 2022) although, instead of using actual percentages, respondents could choose from either pre-prepared value brackets as the Italian statistical office did in its survey (Perani and Guerrazzi, 2012). The importance of digitalisation was based on Mueller et al. (2018), Gao et al. (2012) and Čater et al. (2019a) whereas expected long-term benefits was based on Čater et al. (2019a) who used several sources as well, principally building on Gao et al. (2012) and Müller et al. (2018).

Data were collected in September and October 2022. A total of 135 fully completed questionnaires was submitted as part of the total sample of 250 at least partly completed questionnaires.

Descriptive statistics

The studied sample included about 24% of microenterprises with a maximum of 9 employees, 37% of small enterprises (10–49 employees), 25% of

3 *Details provided in (Redek and Erjavec, 2023).*

medium enterprises (50–249 employees) and 13.5% of large enterprises. Micro companies, despite their relative share in the total number of companies, make up only one-quarter of the sample[4], which is appropriate in view of the purpose of the analysis. Eurostat, for example, surveys the use of digital technologies in companies with at least 10 employees (Eurostat, 2022) The literature also shows that digitisation processes are more intensive in larger companies. Since the purpose of the research was not to analyse the causes of lagging, but chiefly to understand the process and the effects, we were mainly interested in companies that have greater experience with it.

The biggest share of companies comes from the manufacturing sector at almost 35%, followed by trade with 12.9% and "professional, scientific and technical activities" with 9.6%, and then transport and storage, ICT activities and construction. Data on the employment structure by education show that 62.3% of employees in the surveyed companies had less than a university degree, 29.9% held a university education, and the rest a master's degree or doctorate. The education structure was the best in micro-companies where just over half the employees had at least a university education, followed by large companies, where just over one-third of all employees at least held a university education.

Cooperation with foreign markets could have an influence on the introduction of new technologies, pressure from competitors and suppliers, and knowledge transfer. For almost 60% of the companies, the domestic market is important or very important as a source of inputs, materials and components, and for more than half the companies the EU-15 countries are also important. Other EU countries are important or very important for about one-fifth of the companies from a purchasing point of view, and the markets of the former Yugoslavia for a good one-tenth.

Larger companies reported using more technologies on average than medium-sized ones (followed by small ones), which was expected. The diversity and complexity of business processes mean that several technologies are suitable and cost-effective. When assessing the level of digitalisation, about 37% of companies have highly digitised business processes in place. Over 30% of the companies had reached a high level of intensity in the use of new digitisation technologies and 30% perceived themselves as an above-average digitised company. The importance attributed to digitalisation was considerable. Between 60% and 70% of companies found digitalisation, the introduction of new technologies, and related company transformation as one of the critical success factors. Still, the high level of importance was

[4] *In the total population of Slovenian companies, micro companies represent 95% of all companies, which is also similar to their respective share in other EU countries (Statistični urad Republike Slovenije, 2022).*

not always also accompanied by high investments. Companies on average allocated relatively few resources to digitalisation, with 39.4% of respondent firms having allocated up to 1% of their revenues to digitalisation, while only 12.8% of companies allocated more than 5%. Micro-enterprises spent the least on digitalisation since over 60% of respondents reported that up to 1% of revenues were allocated to digitalisation, while only a good 8% allocated at least 3% of revenues. Large companies spent the most on digitalisation, with just under one-fifth of respondents reporting they had allocated more than 5% of their revenues to digitalisation, and another tenth between 3% and 5% of their revenues.

On average, the companies were also quite agile. Over 63% of respondents agreed or strongly agreed that they react quickly to the moves of the competitors, whereas more than 80% of respondents agreed or strongly agreed that they change practices based on customer feedback. Three-quarters of respondents also agreed or strongly agreed that they quickly identify new opportunities to improve the offer to their customers. Agility was also recognised as one of the factors that contributed to the more successful transition of companies through the crisis created by the pandemic (Redek et al., 2022). Respondents in the company were also asked to rate their non-financial performance relative to their peers, where respondents rated their performance compared to their competitors to be the highest in terms of customer loyalty and product quality, followed by the company's reputation. On average, large and medium-sized companies and companies in manufacturing activities were more confident about their relative performance.

Constructs and correlations

Validated scales were used for all the key constructs, except for trade involvement and intangible investments, with only the number of items per scale being lowered. The structure of the scales is provided in Appendix 1 (Table A1). There is no suitable validated scale for trade involvement, except for the partially validated scale on exports (Drenkovska and Redek, 2015). To obtain a measure of trade involvement, involvement in exports and imports was merged in line with the example used in Erjavec (2023)[5]. Similarly, the scale for intangible capital measurement and agility was generated using a modified approach presented in Bavdaž and Redek (2022) (part of the Globalinto approach (Globalinto, 2021)). Table 1 shows Cronbach's

[5] *The questionnaire and results of the survey on intangible capital in Slovenian companies and the factors that impact intangibles. The same scale was used and the alpha and AVE were satisfactory, as was the use of the latent »trade« variable in the analysis.*

alphas and correlations for all the main constructs. The level of digitalisation was measured using a modified self-evaluation (1–5) scale based on Deloitte (2015). Details of the constructs may be found in Erjavec (2022).

*Table 1: RELIABILITY AND CORRELATIONS**

				Non-financial performance	Digitalisation level	Importance of digitalisation	Expected long-term benefits	Intangible investments	Trade involvement	Agility
Non-financial performance	PERF_NF	$\alpha = 0.77$	corr	1.000						
			sig							
Level of digitalisation	DIG	$\alpha = 0.91$	corr	0.5201	1.000					
			sig	0.000						
Importance of digitalisation	IMP_DIG	$\alpha = 0.87$	corr	0.5227	0.6995	1.000				
			sig	0.000	0.000					
Expected long-term effects	LR_EFF	$\alpha = 0.83$	corr	0.6010	0.6010	0.7182	1.000			
			sig	0.391	0.000	0.000				
Intangible investments	INTAN	$\alpha = 0.88$	corr	0.5530	0.2816	0.3148	0.2223	1.000		
			sig	0.000	0.002	0.000	0.008			
Trade involvement	TRADE	$\alpha = 0.81$	corr	0.1018	0.1018	0.2712	0.1705	-0. 0979	1.000	
			sig	0. 1919	0.1296	0.000	0.0108	0.1451		
Agility	AGILITY	$\alpha = 0.78$	corr	0.4711	0.4793	0.5544	0.4519	0.1531	0.1488	1.000
			sig	0.0000	0.000	0.000	0.002	0.022	0.026	

Source: Own. Correlations between constructed latent variables, postestimation.

Estimation was performed using the Stata SEM package. A maximum-likelihood estimation with missing values was used to maximise the number of observations (185 were included in the estimation). The conceptual model was evaluated and standard measures were employed to evaluate the model fit. CFA determined the model's goodness of fit, with Chi2(22) = 317.69 (p = 0.000) and RMSEA = 0.054 (Hu and Bentler, 1999). CFI and TLI were 0.929 and 0.914, respectively.

Test of the hypotheses

Structural equation modelling was relied on to analyse the paths. Results, both standardised coefficients and significance, are reported in Table 2. The two key hypotheses were related to the impact of the level of digitalisation (*H1*) and intangible investments on the firm's non-financial performance (*H2*). The results show that both impacts are, as hypothesised, positive and statistically significant. The model also tested the impact of trade involvement (export and imports to EU-15 and other EU markets) on non-financial performance (*H7*), yet the impact, although positive, was not statistically significant. The measures of non-financial performance in the model included product quality, innovativeness, and cooperation with the best companies in the industry (Table A1 describes all the latent variables and items). Digitalisation level studied the intensity of use of new technologies, the digitalisation level of business processes and the comparative digitalisation level. Intangible capital considered the intensity of investments in the core intangible categories, which include informational capital, research and development, organisational investments, and training.

Table 2: MODEL RESULTS (STANDARDISED COEFFICIENTS ARE REPORTED)

	Hypothesis	Path			Coeff	Sig
Non-financial performance						
Level of digitalisation	H1	DIG_LEV	to	PERF	0.326	0.002
Intangible investments	H2	INTANT	to	PERF	0.416	0.000
Trade	H7	TRADE	to	PERF	0.149	0.133
Level of digitalisation						
Importance of digitalisation	H3	IMP_DIG	to	DIG_LEV	0.544	0.000
Expected long-run benefits	H8	EXP_BEN	to	DIG_LEV	0.175	0.158
Importance of digitalisation						
Expected long-run benefits	H4	EXP_BEN	to	IMP_DIG	0.529	0.000
Trade involvement	H5	TRADE	to	IMP_DIG	0.121	0.112
Agility	H6	AGILITY	to	IMP_DIG	0.281	0.001

Source: Own.

The results for Slovenia confirm the findings of other studies that looked at the importance of intangible capital and digitalisation on firm (non)financial performance either separately or jointly. For example, Bonfour and Etienne (2022) reveal how digitalisation is linked to organisational change and performance. Nonnis et al. (2023) show for a sample of 13 EU countries how knowledge (intangible capital) causes spillover effects and is linked to innovativeness, with Audretsch and Beltski (2020) similarly showing this for the UK. Intangible investments and digital transformation were also linked positively in both our results and those of others. For instance, Lobejko (2020) argues that digital transformation is positively linked to firm innovativeness, which we use as an indicator of non-financial performance. Ivančić et al. highlight the link between digital transformation and quality (2019), while digital transformation is also linked to firms' cooperation within the value chains, especially the advanced suppliers, where digital transformation is often required to maintain such relationships (Domadenik et al., 2022). Therefore, these results corroborate that the findings in the literature are also relevant for the Slovenian environment. Interestingly, inclusion in trade did not have a significant impact, although the impact was positive. A positive impact was expected according to previous studies which emphasised the importance of trade (e.g., Prašnikar, 2010; Prašnikar, Redek, and Drenkovska, 2017) for firms' behaviour. The difference could be due to the sample structure (both SMEs and services dominating) and the fact that companies were comparing their performance to their peers, which implies that a company mostly operating in the domestic market had to compare itself with its domestic peers.

The results show that, as expected (H3), the level of digitalisation first depends on the importance attributed to digitalisation by the firm, which has a strong and significant impact on the level of digitalisation implemented. The importance of digitalisation was investigated via the perceived strategic importance of digitalisation for corporate success, the importance of new technology implementation for the firm's performance, and the importance of digital transformation. Our results confirm that digitalisation is stronger in companies that acknowledge the strategic importance of digitalisation, which is again supported by other findings. For example, Henriette et al. (2016) claim that "digitalization represents strategic, organizational and cultural stakes for the company and requires the commitment and involvement of top management", while Gobble (2018) stresses that digitalisation and digital transformation require "a clear roadmap driven by a digital strategy".

We also hypothesised that the level of digitalisation directly (as well as indirectly) depends on the expected long-term benefits of digitalisation (H8), which in fact has a positive, albeit a non-significant, direct impact on the level of digitalisation in the company. Nonetheless, the indirect effect was positive and significant (Table 3). Namely, the importance of digitalisation depends first on the expected long-run benefits of digitalisation for the firm (H4). The impact is strong and statistically highly significant. The expected long-run benefits were measured via perceived/expected impacts on new business model development, generating higher value added per employee, and creating higher value products than conventional technologies. The results are in line with other findings in the literature which highlight, for example, that digital transformation is driven by the "perceived or expected advantages that arise with the technology use" (Liere-Netheler et al., 2018) and that there are numerous proactive and reactive motives (directly linked to the expected benefits) driving the digital transformation, as was also shown for Slovenia (T. Čater et al., 2021; Černe et al., 2023). These results thereby further confirm that the expected benefits impact the importance attributed to digital transformation by the firm directly (and indirectly also the level of digitalisation).

Agility of the firm additionally impacts the importance of digitalisation for firms (H6), less strongly than the expected benefits, yet still highly significantly. Firm agility was measured using scales from the H2020 Globalinto project (Bavdaž and Redek (2022), that is, part of the Globalinto approach (Globalinto, 2021). The analysis showed that firms that quickly respond to competition, adapt their practices to the competition, and aim to identify new opportunities also attribute greater importance to digitalisation. The causality between agility and digitalisation in our case is on the side of agility[6]. Still, in the literature the debate is still open, even stressing that the agility of firms depends on digitalisation on the country level (Škare and Soriano, 2021). The impact of trade involvement is positive, yet quite weak and also non-significant (H5). The explanation for this might be similar as for the aspect of comparative firm performance.

Table 3: TOTAL, DIRECT AND INDIRECT EFFECTS ON NON-FINANCIAL PERFORMANCE OF THE FIRM (STANDARDISED COEFFICIENTS AND SIGNIFICANCES)

	Direct effects		Indirect effects		Total effects	
	Coeff.	Sig.	Coeff.	Sig.	Coeff.	Sig.
Level of digitalisation						
Importance attributed to digitalisation	0.544	0.000			0.544	0.000
Agility			0.153	0.014	0.153	0.014
Expected long-run benefits	0.175	0.164	0.287	0.001	0.462	0.000
Trade involvement			0.066	0.123	0.066	0.123
Non-financial performance						
Level of digitalisation	0.326	0.003			0.326	0.003
Importance of digitalisation			0.177	0.017	0.177	0.017
Agility			0.049	0.059	0.049	0.059
Intangible investments	0.416	0.001			0.416	0.001
Expected long-run benefits			0.151	0.012	0.151	0.012
Trade involvement	0.149	0.144	0.021	0.173	0.171	0.098
Importance of digitalisation						
Agility	0.281	0.003			0.281	0.003
Expected long-run benefits	0.529	0.000			0.529	0.000
Trade involvement	0.121	0.113			0.121	0.113

Source: Own; *Models always included relevant covariances between the variables.

Table 3 presents the total, indirect and direct effects on firm performance, which consider the linkages between the latent variables, including covariations. While the digitalisation and intangible investments have positive and significant total impacts on non-financial performance, Table 3 also shows that the importance attributed to digitalisation by the firm has a positive and significant indirect effect on non-financial performance while expected long-term benefits has a positive and significant impact on non-financial performance. Firm agility had a positive, albeit marginally non-significant effect, while the impact of trade involvement had positive both direct and indirect effects, but they were not significant, with the total effect also not being significant. Both agility and expected long-term benefits had

[6] *Several model specifications were tested.*

positive and statistically significant indirect effects on the level of digitalisation, while trade involvement again had a weak positive and non-significant effect on the level of digitalisation implemented.

Discussion

Recent literature states that digitalisation and intangible capital are ever more important factors affecting firm performance (C. Corrado et al., 2009, 2019; Hintzmann et al., 2021; RegInsights, 2020; Szabo et al., 2020). While this article addresses the importance of intangible investments and digitalisation as determinants of non-financial firm performance, it also investigates what influences the digitalisation level.

Theoretical contributions

The article addresses the challenge of identifying the contributions made by digitalisation and intangible investments to non-financial firm performance. Non-financial firm performance was measured as firms self-evaluated their comparative performance in the industry with respect to product quality, innovativeness, and cooperation with the best companies in the industry (if a firm was B2B). In short, non-financial performance reflects firms' competitiveness and its main determinants in the long run. The study extends the existing body of knowledge by linking both digitalisation and intangible investments to non-financial performance of the firm. In addition, it shows via indirect effects that the non-financial performance is indirectly linked to the importance attributed to digitalisation by the firm, as well as the perceived long-term impacts of digitalisation. Our results further highlight the importance of firm agility as another driver of digitalisation. The presented study is also the first of this kind for Slovenia, directly linking intangible investments and digitalisation by also studying the drivers of digitalisation. The study also again confirms the importance of both intangible capital and digitalisation for non-financial performance of the firm, adding to the findings of Erjavec and Redek (2022) that stress the complementarity between the two aspects as determinants of value added in SMEs in Slovenia using administrative data. The study also validated one new scale and further validated two existing ones: the level of digitalisation as the new scale, while the adapted trade involvement (based on (Drenkovska and Redek, 2015)) and intangible investments (based on the Globalinto survey (Caloghirou et al., 2022; Globalinto, 2021)) were further validated.

Practical contributions

The study makes several practical contributions to the business community. First, it confirms the importance of digitalisation and intangible investments for firms' non-financial performance, which in essence are the aspects driving firms' long-term competitiveness. Both are increasingly important for productivity growth that further facilitates investments and leads to a positive growth spiral, in turn accelerating both intangible investments and digitalisation. Managers should accordingly focus on strengthening their investments in these factors of growth. In addition, the results show that the importance attributed to digitalisation by the firm and digitalisation itself importantly depend primarily on internal firm factors (as also found by (T. Čater et al., 2021)), arising from strategic importance, firm agility as well as perceived benefits. Trade, as a proxy for external pressure and learning opportunity as emphasised by Prašnikar (2017), is less important. These findings on the importance of internal motives and "desire to succeed" are similar to those found for seven EU economies by Bavdaž and Redek (2022). Therefore, managers should be more proactive in implementing new technologies because the main driver is the companies themselves and, given the importance of digitalisation and intangibles for their non-financial performance, they should invest in both. Namely, in Slovenia the data show that companies are lagging behind in intangible investments relative to the average company in an EU country. Slovenia even ranks in the bottom quarter of countries by the share of total investments channelled into intangible investments (European Investment Bank, 2021).

Limitations and challenges for future research

This study and its results are limited by the specific sample structure and the relatively small sample size. This could affect some results. Although the analysis focused on the impacts of technology and intangible investments on companies and not on the impact of firm demographics, the sample size prevented the testing of differences by groups (e.g., based on company size, industry etc.) or the conducting of an in-depth multilevel analysis, the testing of some hypotheses possibly did not bring the expected results. A much larger sample would also allow the comparative importance of different technologies to be assessed. Further, since the survey was anonymous, it was impossible to link the survey results to other financial indicators, which could highlight some additional differences. Given that it may be assumed that over time the impacts of both technology and intangible investments are not uniform across firms, in the future it would be worthwhile to investigate the impact in the case of Slovenia. This would require repeating the survey to obtain panel data.

Conclusion

The study investigated the impact of digitalisation and investments in intangible capital on firms' performance. The SEM approach using survey data shows that, as hypothesised, the effects of the level of digitalisation implemented and intangible investment on the non-financial performance of firms are positive and statistically significant. As expected, the level of digitalisation depends on the importance attributed to digitalisation by the firm (via perceived strategic importance) while the importance of digitalisation depends on the expected long-term benefits of digitalisation for the company. The level of digitalisation is dependent on the expected long-term benefits of digitalisation, which in fact has a positive, albeit non-significant impact on the level of digitalisation in the company. Although business agility has an impact on the importance of digitalisation for businesses that is less than the expected benefits, it is still highly significant. The results also show that the impact of being involved in commerce on the importance attributed to digitalisation by the firm is positive, yet quite weak and also not significant and, similarly, the impact of trade involvement (export and imports to EU-15 and other EU markets) on non-financial performance, albeit positive, was not statistically significant. The research confirms the importance of digitalisation and intangible investments for firm performance and that both are becoming increasingly important for productivity growth. While Slovenian companies are relatively well acquainted with the latest digital technologies in their industry, they should invest more in intangible capital because they are lagging behind in intangible investments. The biggest challenge is to find qualified personnel to support the transformation process, whereby the company's strategy is very important. The research revealed major differences exist in terms of digital transformation between companies in the manufacturing and service sectors on one hand and between companies embedded in global value chains on the other.

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Appendices

Table A1: DESCRIPTIVE STATISTICS AND SCALE DESCRIPTION

		Variable	Mean	Std.	Dev.	Min
Latent variable	Agreement with the statements (Likert scale, 1–5)					
Level of digitalisation	Our business processes are highly digitised	Q28a	3.155	0.891	1.000	5.000
	The level of intensity of the use of new technologies and digitisation in our company is very high.	Q28c	3.111	0.828	1.000	5.000
	We see ourselves as a company with an above-average level of digitalisation intensity.	Q28d	3.009	1.013	1.000	5.000
Non-financial performance	Product quality	Q19a	3.768	0.731	2.000	5.000
	Company innovation	Q19c	3.581	0.866	2.000	5.000
	The company's commitment to working with the best suppliers or buyers (if B2B) in the industry	Q19k	3.568	0.838	1.000	5.000
Agility	At our company, we react quickly to the moves of our competitors.	Q26b	3.686	0.813	1.000	5.000
	We change our practices based on customer feedback.	Q26c	3.975	0.722	1.000	5.000
	We quickly identify new opportunities to improve our offer to our customers.	Q26f	3.803	0.768	1.000	5.000
Intangible investment**	Organisational and business process improvement	Q21e	2.911	1.520	1.000	8.000
	Purchase of software and databases	Q21b	3.200	1.760	1.000	8.000
	Research and development	Q21c	3.818	2.070	1.000	8.000
	Training due to new technology implementation	Q21f	2.748	1.550	1.000	8.000
	Training and education of employees	Q21g	2.779	1.405	1.000	7.000
Importance of digitalisation	Digitalisation is one of the key success factors.	Q27c	3.814	0.915	1.000	5.000
	The introduction of new technologies is one of the key success factors.	Q27b	3.644	0.920	1.000	5.000
	Digital transformation is important for our business.	Q28e	3.752	0.850	1.000	5.000
Expected long-term benefit	Digitalisation is creating new business models.	Q18a	3.717	0.776	1.000	5.000
	Digitalisation is creating more value than conventional ways of doing business.	Q18d	3.732	0.791	1.000	5.000
	Digitalisation is adding more value per employee than using conventional technologies.	Q18e	3.897	0.691	1.000	5.000
Trade involvement*	Imports from EU-15	Q8c	3.068	1.669	0.000	5.000
	Imports from other EU markets	Q8d	2.194	1.674	0.000	5.000
	Exports to other EU markets	Q7d	2.012	1.515	0.000	5.000

*In case of trade involvement, the scale was 0–5, evaluating the importance of the relationship, "not at all, very little, little, the market is of mediocre importance, important, very important".
**Intangible investment was measured using the following scale: 1 = 0 %, 2 = up to 0.5 %, 3 = 0.5 %–1 %, 4 = 1 %–2 %, 5 = 2 %–3 %, 6 = 3 %–5 %, 7 = 5 %–10 %, 8 = more than 10 %. Maximum value from the sample is displayed as the maximum, implying that no firm invested more than 10 % in training.
Source: Own.

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OCCUPATIONAL HEALTH IN SLOVENIA

Abstract. *While considering a two-level approach, in the article we discuss systemic issues related to occupational safety and health (OSH) data. On the individual level, we focus on OSH incidents that indicate the status of occupational health. On the company level, we examine OSH management data that reveal the monitoring system. Our analysis shows that the Slovenian OSH data collection system depends on employers' reporting rather than on professionals monitoring workers' health. The OSH system is oriented to legal compliance more than the regular monitoring of OSH activities. The introduction of systemic measures that integrate the various OSH stakeholders and reintegrate occupational medicine into the health system is recommended.*

Keywords: *occupational medicine, occupational health, occupational safety, occupational diseases, occupational injuries, Slovenia*

Introduction

Workers' health is a major and growing public health issue, particularly in view of the negative impact of work on workers' health and the ageing of the working population. The issue of occupational safety and health (OSH) is gaining the growing interest of policymakers and researchers in European countries. One principle of the European Pillar of Social Rights (European Commission, 2017) is to ensure that the place where people work is safe, fit for purpose, and maintains workers' health. The European policy framework has positively impacted the assessment and management of risk factors in the workplace and promoted the spread of common standards across Europe. Over the years, the EU has struggled to overcome the harmonisation deficits in statistical standards. Data on occupational accidents are collected through national occupational accident reporting systems, while data on occupational diseases are limited due to problems with the

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availability and comparability of data on recognised occupational diseases. In the recent Strategic Framework for Health and Safety at Work (European Commission, 2021), the Commission identified prevention as the main OSH priority. Effective prevention is seen as a tool for reducing occupational accidents and diseases. The prevention of work-related musculoskeletal disorders remains a major concern on the EU level.

A crucial and fundamental part of any prevention strategy is a clear understanding of the number of accidents and diseases, their severity, causes, and the workplaces and industries in which they occur. This means that a well-functioning and effective system for reporting accidents and diseases is a precondition for appropriate OSH measures on the national level. Sound information is especially needed for emerging occupational diseases and other occupational health hazards where rapid awareness, investigation and response can save lives.

The article examines the issue of measuring data in the field of occupational safety and health in Slovenia. We suggest that the quality of data depends mainly on the approach to the data measurement and monitoring of OSH. The measurement and monitoring of data can serve different purposes, either for reporting to external bodies like the health insurance fund or the labour inspectorate, or for the employer's own use in planning preventive measures. Two main approaches to data measurement and monitoring can be identified in the literature on OHS. The outcome-based approach usually relies on outcome data or lagging performance indicators such as the frequency of occupational accidents and diseases, absenteeism due to accidents or illnesses, number of near misses etc. These measures provide feedback on deficiencies and safety incidents that have occurred. These indicators are often confronted with leading indicators, and numerous articles have addressed the selection and functions of various types of indicators (Mearns et al., 2003; Sinelnikov et al., 2015). The process-based approach relies on leading indicators that, on the other hand, provide information on OSH inputs or activities and allow companies to identify risks before an OSH incident occurs (Sinelnikov et al., 2015). Examples of such indicators are the number of workplaces where a risk assessment has been carried out or updated, the percentage of employees trained in OSH in each period etc.

The aim of this article is to address the aforementioned problem of measuring OSH data by considering a two-level approach to data analysis: (1) the individual level, which focuses on OSH incidents and indicates the current status; and (2) the company level, which indicates the current status of OSH management and monitoring system. We critically examine the concept of OSH data and propose a framework that encompasses both individual and enterprise levels that can contribute to a better understanding of OSH data quality. The article is structured as follows. First, the OSH system in Slovenia is presented. Second, the methodological framework used for the study is described. The third section of the article provides a detailed overview of the current state of OSH data measurement in Slovenia, while the fourth section presents a conclusion.

Methodological approach

Our methodology consists of the two steps summarised below: (1) Individual level: a selected dataset describing the health status of workers in Slovenia was used; the process of collecting data on the health status of workers was analysed; and (2) Company level: a selected dataset was identified and employed to describe OSH management; the OSH surveillance system was analysed. Following Ule (2013), several types of data are used here to understand health issues. Objective data is the conventional category for safety indicators used in industrial practice. In addition, we include the subjective assessment of health, which is based on the individual's own experience and may therefore reveal a different health situation than objective indicators given that these two groups of indicators do not necessarily coincide (Ule and Kurdija, 2013).

Individual level

In order to analyse the health status of workers in Slovenia, a systematic review of the data was conducted. Three types of approaches were used: (1) searches were conducted in electronic databases (ILO, NIJZ, ZPIZ, SURS) using the following keywords: "health" and "workplace" or "work". To be included in the analysis, the data had to meet several criteria: Availability and potential for intervention; (2) a search was conducted for articles in electronic databases (SAGE Journals, EBSCOhost, ScienceDirect, Scopus) using the following keywords: "health" and "workplace" and "Slovenia". The inclusion criterion for the analysis was research (original or secondary) on occupational health in English or Slovenian; and (3) data on different aspects of work in EU countries were sought (EU-OSHA, Eurofound). We analysed data from the sixth EWCS (Eurofound, 2017), which encompassed almost 44,000 workers (both employed and self-employed) in 35 European countries, where workers reported on their health situation.

Company level

A systematic review of data was conducted to analyse OSH management issues in workplaces in Slovenia. A search was performed for data on various aspects of the working environment in EU countries (EU-OSHA, Eurofound) and in Slovenia (IRSD). We analysed data from the sixth EWCS (Eurofound, 2017) and data from EU-OSHA on risks in the working environment, covering a total of 45,420 establishments from 33 countries (EU-OSHA, 2019).

Legislative framework in Slovenia

Safety at work became a constitutional right in 1974 following amendments to the Constitution of SRS (Socialist Republic of Slovenia) and was regulated by the Safety at Work Act (ZVD, 1974). After the decline of factory clinics during the 1990s, adoption of the Occupational Safety and Health Act in 1999 (ZVZD, 1999) defined occupational health very precisely and introduced the safety declaration and risk assessment document. Employers were given the duty to ensure the health and safety of their workers at work. After several years of debate, a new law on health and safety at work was passed in 2011. The aim of the new law was to respond to employers' lapses in safety, introduce new implementation measures, and address the promotion of health at work. Employers are required to ensure the health and safety of workers (ZVZD-1, 2011) and to provide safety and health at work free from occupational accidents, occupational diseases and work-related illnesses (ReNPVZD18-27, 2018). According to the Law on Safety and Health at Work (ZVZD-1, 2011), employers are responsible for the safety and health of their workers at work. The basic principles in implementing measures to ensure workers' safety and health are the prevention, elimination and management of occupational risks, the provision of information and training to workers, and ensuring the necessary organisation and resources.

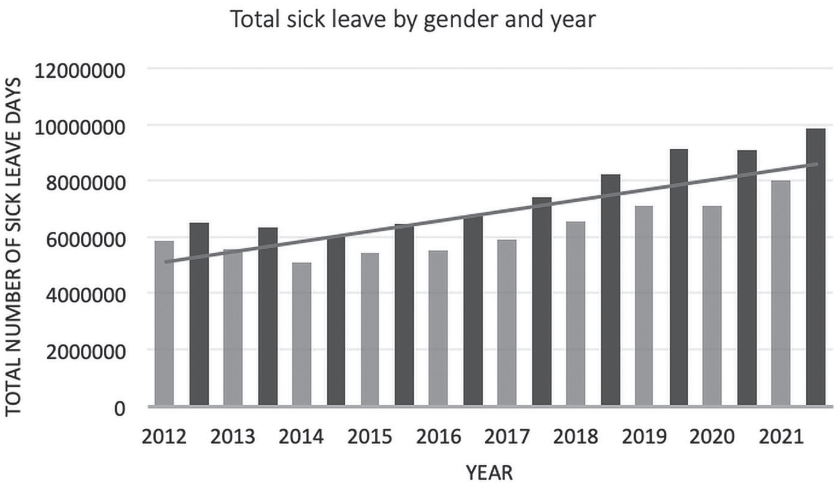
Unfortunately, the new law has not brought about any systemic changes. The system is still characterised by the expansion of external service activities and considerable marketability of transactions between employers and service providers. As regards OSH responsibilities like information, advice and risk assessment, employers in Slovenia largely rely on external service providers. Such providers provide OSH services to 90% of Slovenian companies, compared to other parts of Europe such as France (38%) and Switzerland (37%) (EU-OSHA, 2019). However, this does not absolve them of their responsibilities in this area. Employers use external services when in-house expertise is deemed insufficient for these tasks.

Health status of workers in Slovenia and data monitoring

Absences from work in Slovenia

Data on sickness absence due to illness, injury and other causes are collected by the National Institute of Public Health and based on medical certificates issued by healthcare providers. In Slovenia, the share of sick leave days per employed person fell in the period between 2000 and 2014, reaching its lowest level of 3.75% in 2014 (NIJZ, 2020). The decline in sick leave can be attributed to the slow economic recovery, labour market instability and high unemployment reaching 12% in 2012 (SURS, 2015). In 2015, Slovenia was among the countries with the lowest sickness rate. At the same time, Slovenia was one of the countries reporting the highest rates of presenteeism, i.e., people reported working while sick at a higher rate (Eurofound, 2017). Since 2014, there has been a significant rise in sick leave days, as shown in Graph 1. Overall, the increase from 2014 to 2020 was 31% to reach 4.91% (NIJZ, 2020). The percentage of sick days increased with age and was the lowest among young workers (2.70%) and highest in the 55–64 age cohort (8.12%). This increase was much more pronounced for women (29%) than for men (13%).

Graph 1: TOTAL SICK LEAVE IN SLOVENIA BY GENDER AND YEAR



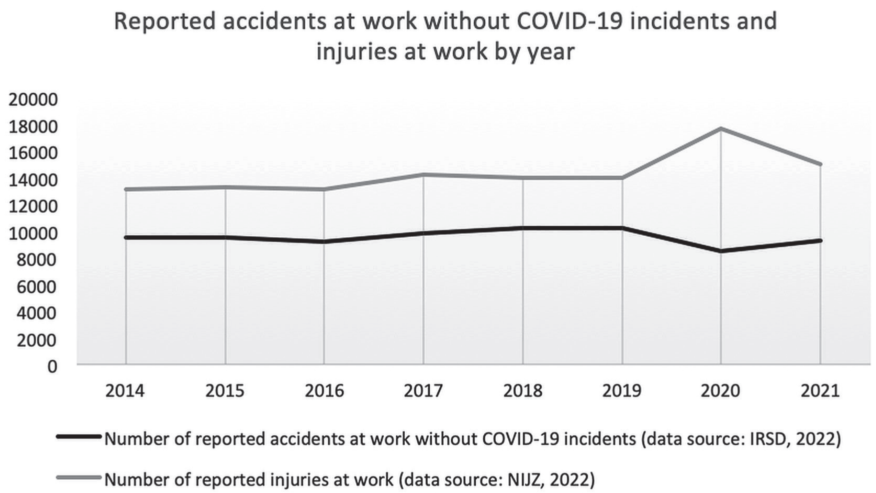
Source of data: NIJZ (2022).

In Slovenia, in 2020 musculoskeletal disorders (MSDs) were the main reason for temporary absences from work (out of 23) for both women (31.1%; 32.1%) and men (25.9%; 20.7%) respectively in the 45–64 age cohort and the 65+ age cohort (NIJZ, 2020). Research on musculoskeletal disorders (MSDs) also shows that the most problematic MSD health symptom is lower back discomfort (Zerbo Šporin et al., 2021). The prevalence of this symptom is higher in some economic sectors like agriculture, forestry and fishing with a long average duration of illness, and in certain types of work such as long-term computer use. Prolonged sitting is one of the most obvious ergonomic risks. The presence of this risk factor was reported most frequently in Slovenia (74%) and least frequently in Ireland (41%) (EU-OSHA, 2019).

The data on sick days do not reveal what proportion of sickness absence is due to work or the work environment, apart from workplace injuries. Workplace injuries are most common among young men in the 20–44 age cohort and are the fourth reason for absenteeism among the older (65+) male population. Injuries at work are also the third-most common cause of incapacity (2.8%), after illness (90.4%) and injuries outside work (5.4%), followed by occupational diseases (0.1%) (ZPIZ, 2022). According to International Labour Organization (ILO) statistics on non-fatal accidents at work, Slovenia ranks 19th out of 83 countries with 1,518.5 cases per 100,000 workers in 2019, just after Austria and Switzerland, and 57th in fatal accidents at work with a rate of 1.9 in 2020, right after Estonia and Poland (ILO, 2019).

Between 2014 and 2021, the total number of workplace injuries rose, peaking in 2020 at 17,621 incidents (NIJZ, 2022). These data is based on reported injuries and includes incidents where workers took sick leave due to a COVID-19 infection or had contact at work with a person with a COVID-19 infection. If we compare these data with the data on occupational accidents (Graph 2), which is one of the central indicators for the OSH system, we see that the total number of reported occupational accidents, excluding COVID-19 incidents, was rising until 2019 and then decreased in the epidemic year of 2020.

Graph 2: ACCIDENTS AND INJURIES AT WORK IN SLOVENIA BY YEAR



Sources of data: IRSD (2021) and NIJZ (2022).

The primary reason for this decrease could be the drop in the total number of injuries due to temporary layoffs and the increase in telework. The system for collecting data on fatal occupational accidents, collective accidents, dangerous occurrences or occupational diseases was changed in 2022. Today, the data can be accessed by the Labour Inspectorate of the Republic of Slovenia, the Slovenian Health Insurance Institute, and the National Institute of Public Health.

The health status of workers in Slovenia

The health status of workers in Slovenia is monitored by occupational health specialists during workers' health examinations. Employers in Slovenia are obliged to offer preventive medical examinations to employees, whereby the type, scope, content and examination periods are agreed with the occupational physician. In Slovenia, around 150 occupational physicians provide their services in either the public or private sector. In 2020, occupational physicians performed 236,874 preliminary, periodic and special medical examinations of workers, accounting for over 21% of all examinations on the primary healthcare level (NIJZ, 2022). Not all countries have the same practices in this area of OSH. The national context and differences in national legal obligations are a determining factor in the use of medical services. In Slovenia, companies are mostly compliant (98%), while in some other countries, such as Denmark (11%), employers are not obliged to offer medical examinations. Slovenia is also at the top in the use of company doctors, whereas some countries appear at the bottom of the scale (EU-OSHA, 2019).

Occupational physicians also provide services on the employer's premises, such as assessing specific health requirements, but have only an advisory role, without the right to take action in the event of employer misconduct. If they suspect signs of occupational diseases or work-related illnesses and disabilities, they rely on the employer's permission for further investigations that could confirm their existence. Employers are obliged to report all occupational diseases detected and, if an occupational disease is suspected, to refer the worker to a specialist in occupational medicine for further examination. Again, verification of the occupational nature of the disease entails services additional to health examinations, which are usually not in the employer's interest. These provisions of the existing Occupational Health and Safety Act regulating occupational diseases are not adapted to the new regulations on occupational diseases (Pravilnik o poklicnih boleznih, 2023) adopted in April 2023. After 20 years, under the new regulations on occupational diseases, a worker now has the right to request an occupational disease review from the Clinical Institute of Occupational, Traffic and Sports

Medicine, with the costs being covered by the worker's insurance against occupational accidents and diseases. The statistics on occupational diseases in Slovenia reveal cases of recognised occupational diseases. In 2020, the Labour Inspectorate received reports of three cases of occupational diseases (IRSD, 2021). The low number of reported occupational diseases might indicate that the actual incidence of occupational diseases is not known. With an adequate system of detection, verification and registration in place, we could detect about 290 cases of occupational diseases annually (Dodič Fikfak and Črnivec, 2009). The statistical occurrence of occupational diseases is not possible on the European level due to differences in legal systems and procedures for the recognition of occupational diseases in EU countries.

Perceived health of workers in Slovenia

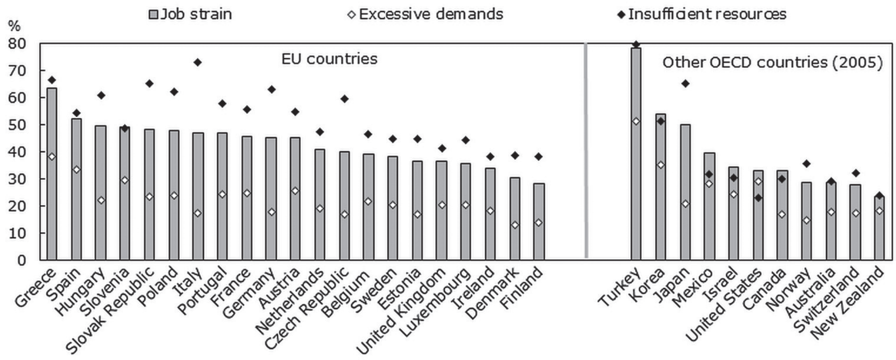
Surveys reporting on the health of workers in Slovenia are inconsistent. The Slovenian Opinion Survey conducts the most consistent set of surveys reflecting subjective assessments of health and healthcare in a representative sample of the adult Slovenian population. Self-assessed health surveys conducted in Slovenia point to significant differences in subjective assessments of health between men and women in Slovenia, with even greater differences between different socio-economic categories in the female population. Health that is self-assessed is significantly lower among women at the lower end of the education and income scales. Women also consistently report more symptoms of stress than men, and the gap appears to be widening over time (Malnar and Hafner-Fink, 2013).

Surveys focusing on specific sectors of the economy, such as healthcare (Tabaj et al., 2015; Dobnik et al., 2018; Škerjanc and Fikfak, 2020; Lorber et al., 2020), public administration (Buzeti, 2022) and outdoor workers (Pogačar et al., 2019), are conducted in sectors where health indicators like sickness absence and workplace stress are expected to be higher. Workplace stress surveys in the health sector use different measurement scales, such as the Psychological Well-being Scale (Lorber et al., 2020), the Holms-Rahe Stress Inventory (Škerjanc and Fikfak, 2020), the Work Pressure Questionnaire (Tabaj et al., 2015) and the Nurses Stress Scale (Dobnik et al., 2018). The results indicate various sources of stress for different healthcare workers, such as psychosocial risk factors at work for healthcare professionals in a medical centre (Škerjanc and Fikfak, 2020), too much work and too many administrative tasks for vocational rehabilitation workers (Tabaj et al., 2015), and job satisfaction, disruptive factors at work and no opportunity for a day off to compensate for overtime for care workers in Slovenian hospitals (Dobnik et al., 2018). Sickness absence in public administration is related to perceptions of leadership behaviour (Buzeti, 2022) and workplace heat stress for outdoor workers (Pogačar et al., 2019), which affects their productivity and well-being.

The health of Slovenian workers compared to other countries

In comparison with other countries, Slovenia had a high share of workers suffering from occupational stress in 2015 (Graph 3) (OECD, 2016).

Graph 3: INCIDENTS OF JOB STRAIN BY COUNTRY



Source of data: OECD (2016).

In terms of gender, men and women in Slovenia report similar levels of work intensity, but what distinguishes these two groups is how work intensity affects their health. In Slovenia, the relationship between work intensity and workers' health has been found to be negatively correlated, especially with women's health (Čehovin Zajc and Hafner, 2020).

Slovenians who work in intensive work environments have statistically significantly poorer health as evidenced by self-rated health, physical pain, and difficulties at work and at home caused by health problems (Kohont and Čehovin Zajc, 2019). Working conditions like work intensity and work pressure also strongly influence the extent of work–family conflict (Kanjuo-Mrčela and Ignjatović, 2013). This is in line with other studies based on subjective elements of satisfaction (Boye, 2009). They show that men's well-being does not seem to be influenced by hours of paid work and housework, while women's well-being increases with hours of paid work and decreases as housework increases.

In 2019, Slovenia led the EU-28 in the employment rate of women aged 15–64 with two children at 88%, followed by Sweden at 79% (European Commission, 2022). In this respect, Slovenia is similar to the Scandinavian countries where care/parental support allows for relatively high female employment, which could also be associated with longer working hours and greater work pressure. Slovenia also belongs, together with Slovakia, Hungary and the Czech Republic, to the group of countries where only 10% or less of the respondents work part-time. On the other hand, in countries like the UK and the Netherlands, many mothers work part-time, which reduces the pressure on the family. Country differences in the distribution of working hours are important because they reflect both sectoral and occupational composition, national traditions and the influence of working time arrangements.

Worryingly, Slovenia also had an extremely high share of fixed-term contracts among young working women aged 15–24 in the first three quarters of 2021, accounting for over 60% of total employment (European Commission, 2022). In terms of work sustainability, Slovenia is also among the countries with the lowest proportion, with less than 50% of respondents aged 55 or below thinking they could work until the age of 60 (Eurofound, 2017). This is in sharp contrast to Germany, Portugal, Denmark and Sweden where the figure is than 80%. In most countries, the differences between men and women are small, but in Slovenia there is a gap of around 15 percentage points, with women being significantly less optimistic about their future ability to work. In Slovenia in particular, the differences between men and women are bigger for the second cohort of workers aged 56 or older. The desired retirement age workers reported is also the lowest in Slovenia (57 years) and Turkey (53 years) and the highest in the Scandinavian countries, i.e., Norway (65 years), Denmark (64 years) and Sweden (63 years).

Occupational safety and health surveillance in Slovenia

In Slovenia, occupational safety and health is the responsibility of both the Ministry of Labour, Family, Social Affairs and Equal Opportunities and the Ministry of Health. The main body in Slovenia that monitors OSH is the Slovenian Labour Inspectorate (IRSD). It monitors the implementation of OSH regulations, provides advisory services and strives to improve the knowledge of employers and workers. The IRSD reports to the Ministry of Labour, Family, Social Affairs and Equal Opportunities. It inspects the labour market with the aim of monitoring the introduction and enforcement of OSH measures by employers. It also educates workers and employers about OSH standards and risks. However, each of the 31 inspectors working on OSH is tasked with monitoring over 7,000 establishments that provide employment (IRSD, 2021).

Data from labour inspections show that employers in Slovenia frequently violate occupational health and safety regulations, such as medical examinations, despite being required to do so by law. In 2020, occupational health violations accounted for more than 13% of all violations detected by health and safety inspectors (IRSD, 2021). Most of these violations were due to the lack of provision of preventive medical examinations and the failure to carry out tasks that under the law (ZVZD-1, 2011) should be performed by occupational health specialists. In 2020, safety and health inspectors conducted 7,016 inspections and detected 10,189 violations (IRSD, 2021).

The provision of risk assessments in written form is well implemented in Slovenia (EU-OSHA, 2019). However, the participation of internal staff while conducting risk assessments in Slovenia is extremely low. There is also a lack of regular OSH discussion in team meetings in Slovenian companies, which is an essential element of a company's commitment to a safe and healthy work environment and a key building block for ongoing proactive OSH work by management. Once again, Slovenia lags far behind countries with a stronger tradition of employee involvement, such as Sweden (EU-OSHA, 2019). The most effective means of reducing occupational risks are technical changes to the materials, equipment, or manufacturing processes that cause the risk. In Slovenia, inadequate equipment, poor maintenance and improper use of equipment are common causes of workplace injuries identified by safety and health inspectors (IRSD, 2021).

In addition, violations of risk assessments account for nearly 25% of all 10,189 violations, mostly due to their inadequate content, risk identification, and revision (IRSD, 2021). The lack of consultation with internal staff on appropriate measures to ensure a healthy and safe working environment and the absence of specific conditions that should be established by the employer and an occupational health professional also play a role.

In the case of occupational accidents, occupational safety experts must monitor the situation and its causes. This service includes reports and proposed measures for the employer. Yet, this additional service is only provided on the employer's request and depends on whether the employer is willing to pay for it. Many opportunities to improve the safety of the working environment accordingly remain dependent on the employer's interest. In Slovenia, about 250 organisations are licensed to provide professional services. Similar to occupational physicians, occupational safety professionals are independent of the employer and are mainly tasked with advising the employer on work equipment and the work environment, conducting regular inspections of the hazardousness of the work environment and inspections and testing of work equipment, and training employees in safe work practices.

Conclusion

The article has examined the OSH data in Slovenia. We adopted a two-level approach, including the individual level of selected datasets to describe the health status of workers in Slovenia and the process of data measurement, as well as the company level to describe OSH management and monitoring.

The analysis of data on the health of the Slovenian labour force shows that its health status may be denoted by a significant rise in sick leave days since 2014, a steady increase in (reported) occupational accidents since 2013, and a small number of reported occupational diseases based on incomplete data. Women in Slovenia are a group of the working population with a greater increase in sick leave days, which also increases with age. Women in Slovenia also consistently report high work intensity, which is negatively correlated with their health. Women also report more stress symptoms than men and are significantly less optimistic about their future ability to work than men, with this difference appearing to increase over time.

Our analysis additionally shows that the OSH system in Slovenia is characterised by a poor recording system. Data on sick leave days are provided by general practitioners, not by employers or occupational physicians. The two medical professions perform their activities essentially alongside each other and have no hand in monitoring employers and their management of occupational safety and health. Data on occupational accidents and diseases are also reported by employers. These data depend on the employer's decision to report such injuries and to warn workers when an occupational disease is suspected. Therefore, the low numbers may be due to underreporting rather than the absence of hazards. The use of the current data system for sick days, injury outcomes, and occupational diseases as the major measures of safety performance may therefore act as an obstacle to improving safety in Slovenia. The lack of comprehensive reporting on work-related health problems makes it difficult to determine the contribution of work-related injuries and illnesses to overall rates of illness and disability. A look at the data on perceived health shows that the Slovenian labour force suffers from occupational stress to a greater extent than most other EU countries, and that Slovenian women in particular are significantly less optimistic about their future ability to work.

On the operational level, our analysis shows that the IRSD plays a crucial role in the Slovenian OSH system. It is the only supervisory authority in the Slovenian OSH system that can monitor employers' performance and take appropriate action. Inspections are hence the most important indicator of OSH performance. However, the Inspectorate conducts only a limited number of inspections per year in an area of more than 220,000 Slovenian companies, which means that a large proportion of work environments (69% in 2018) have never been inspected (Krištofelc, 2022). Our analysis of company data reveals that employers in Slovenia focus more on legal compliance than on regularly monitoring activities that contribute to their OSH performance. Prevention should become the focus for employers in Slovenia. Risks are indicators and precursors of harm that provide early warning signals of potential failure. As such, they give organisations the opportunity to identify and mitigate risks or increases in risk before an occupational safety and health incident occurs. Improving working conditions by reducing workplace hazards and other health risks can help to protect workplace health and keep all workers employed.

It appears that several deficiencies in the Slovenian OSH system are hindering efforts to implement effective OSH measures. These deficiencies are not the lack of occupational health professionals like in some other countries (Drakopoulos, 2012: 59), but the lack of a thorough understanding and management of the risks that lead to injuries and illnesses, and subsequently the absence of oversight capabilities of the supervisory authority while enforcing the law. Slovenia needs to introduce systemic measures to integrate the various OSH stakeholders and bring occupational medicine back into the health system. This integrated system would overcome the existing dependence on funding by employers, who have a strong incentive to limit their costs. Their interests must not compromise the integrity of the professionals who perform their main task, which is to monitor working conditions and act on workers' health.

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*Nika FERBEŽAR, Marko GAVRILOSKI**

REZILIENTNOST LGBTQ+ MLADIH V OKVIRU VZGOJE IN IZOBRAŽEVANJA: INTEGRATIVNI PREGLED LITERATURE**

Povzetek. *Vzgojno-izobraževalne ustanove posedujejo velik potencial za zmanjševanje vpliva manjšinskega stresa na življenja mladih LGBTQ+. V članku se osredotočamo na rezilientnost mladih LGBTQ+ v okviru šolskega okolja. Opravljen sistematiziran integrativni pregled literature je zajel 57 empiričnih in teoretičnih kosov gradiva. Kvalitativna vsebinska analiza kaže, da lahko vzgojno-izobraževalne ustanove za učenke_ce LGBTQ+ predstavljajo pomemben vir skupnostnih procesov rezilientnosti, medtem ko je njihova vloga pri krepitvi individualnih procesov rezilientnosti manjša. Kot pomembna so se izkazala tudi področja, ki niso neposredno vezana na šolsko polje, a je v okviru le-teh za optimalen razvoj mladih LGBTQ+ zaželena zavzetost šolskega strokovnega osebja.*

Ključni pojmi: *mladi LGBTQ+, vzgojno-izobraževalni sistem, rezilientnost, manjšinski stres, spol, spolna usmerjenost, sistematiziran integrativni pregled literature*

Uvod

Življenja oseb LGBTQ+ v nadpovprečnih deležih zaznamujejo negativni izidi nepravičnih in sovražnih družbenih procesov v obliki težav z duševnim (Austin et al., 2022; Hatchel et al., 2019; Jadva et al., 2021; Price-Feeney et al., 2021; Witcomb et al., 2019) in fizičnim zdravjem (Herman, 2013; Lick et al., 2013), pa tudi v obliki drugih neugodnih vplivov na njihova življenja, npr. brezdomnost (Bruce et al., 2014; Green et al., 2022), uporaba substanc (Lehavot in Simoni, 2011; Robinson, 2021), zmanjšanje akademske perspektivnosti (Herman, 2013; Robinson, 2021; Sešek in Margon, 2021; Koletnik, 2019), znižani občutki šolske pripadnosti (Hatchel et al., 2019) in izzivi

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pri vzpostavljanju ter ohranjanju zdravih družbenih odnosov (Edwards in Sylaska, 2013; Hatzenbuehler in Pachankis, 2016; Johns et al., 2021; Witcomb et al., 2019). Vzroke za navedene in podobne negativne izide Meyer (1995, 2003, 2013, 2015) vidi v temeljnih družbenih strukturah in procesih nepravičnosti (nasilje, diskriminacija, stigma, predsodki itn.), ki jih doživljajo osebe LGBTQ+ zaradi svojih marginaliziranih življenjskih kontekstov, kar pojasnjuje z modelom o manjšinskem stresu. Manjšinski stres je prisoten v življenjih oseb LGBTQ+ zaradi stigmatiziranih osebnih okoliščin, ki temeljijo na spolu in spolni usmerjenosti; to je tudi eden od virov stresa za mlade LGBTQ+ v vzgojno-izobraževalnih ustanovah, na kar nakazujejo tudi nekatere slovenske raziskave (Ferbežar et al., 2021; Koletnik, 2019; Komidar in Mandeljc, 2009; Kuhar in Švab, 2014; Kuhar in Švab, 2019; Maljevac in Magić, 2009; Perger et al., 2018; Sešek in Margon, 2021). Čeprav omenjene raziskave niso direktno naslavljale manjšinskega stresa, so bili posamezni elementi prepoznani in opredeljeni kot diskriminacija, stigmatizacija, predsodki, različne pojavne oblike nasilja itd., kar pomeni, da so tem mehanizmom nepravičnosti in sovražnosti tako na individualni kot sistemski ravni podvrženi tudi mladi LGBTQ+ v slovenskem vzgojno-izobraževalnem (VIZ) prostoru. Kljub posledicam teh mehanizmov mnoge mlade osebe LGBTQ+ preživijo negativne izkušnje in odraščajo v zdrave posameznice_ke ter dosegajo uspehe na različnih področjih življenja, kar pojasnjujemo s teorijo o rezilientnosti, ki predstavlja pomemben del nadgrajenega modela manjšinskega stresa (Meyer, 2015). V pričujočem besedilu se ne osredotočamo na procese manjšinskega stresa, saj so zaradi obsežne tematike predstavljeni v ločenem članku, čeprav gre za rezultate enotnega integrativnega pregleda. Namen članka je namreč prek obstoječe literature o manjšinskem stresu in procesih rezilientnosti poglobiti razumevanje izkušenj mladih oseb LGBTQ+ z vzgojno-izobraževalnim sistemom in s tem ponuditi teoretično izhodišče za nadaljnje empirično raziskovanje ter potencialne izboljšave VIZ-prakse, zaradi česar je bil cilj vključiti čim popolnejši del obstoječe vsebinsko relevantne literature. Teoretičnemu pregledu Meyerjevega modela manjšinskega stresa sledi opis sistematiziranega integrativnega pregleda literature ter podani rezultati individualnih in skupnostnih procesov rezilientnosti, ki jih v razpravi umeščamo v širši družbeni kontekst.

Meyerjev model manjšinskega stresa

Model manjšinskega stresa pojasnjuje vlogo kroničnega psihosocialnega stresa v življenjih oseb z marginaliziranim družbenim statusom (Meyer, 2015). Model manjšinskega stresa je sprva opredeljen v kontekstu manjšinskih spolnih usmerjenosti (Meyer, 1995, 2003, 2013), Hendricks in Testa (2012) pa ga dopolnita tako, da vključuje tudi posebne okoliščine transspolnih oseb. Njuno delo in nekatera druga (Bockting et al., 2013; Testa et al., 2015) Meyer (2015) kasneje vzame v ozir in model nadgradi z vključitvijo transspolne populacije in izpostavitvijo pomena rezilientnosti. Model sestavljajo procesi manjšinskega stresa, ki se delijo na zunanje distalne stresorje in notranje proksimalne stresorje. Distalne stresorje predstavljajo zunanji dogodki, ki so povezani z negativno družbeno klimo (nasilje, diskriminacije, mikroagresije itn.) (Meyer, 2015). Riggs in Treharne (2017) opozarjata, da pri tem ne moremo govoriti le o eni osebni okoliščini (npr. o spolni usmerjenosti), temveč je v ozir potrebno vzeti pomen intersekcionalnosti (Crenshaw, 1991) in privilegije ter s tem upoštevati kompleksne neenakosti (Kuhar in Pajnik, 2022) življenjskih kontekstov posameznic_kov (Riggs in Treharne, 2007). Distalni procesi manjšinskega stresa imajo neugoden vpliv na blagostanje oseb LGBTQ+. Izkušnje različnih oblik diskriminacije tako na primer predstavljajo dejavnik tveganja za samomorilno vedenje, uporabo psihoaktivnih substanc (Lea et al., 2014; Lelutiu-Weinberger et al., 2020; Romanelli et al., 2018) in samopoškodovalno vedenje (Treharne et al., 2020). Tveganje za duševno zdravje predstavljajo tudi različne oblike nadlegovanja in nasilja (Bränström, 2017; Liu in Mustanski, 2012). Lick et al. (2013) pa dodatno ugotavljajo, da ima manjšinski stres negativne vplive tudi na telesno zdravje oseb LGBTQ+.

Proksimalni stresorji, ki jih razumemo kot notranje odzive ponotranjene negativne sporočilnosti distalnih stresorjev, so: 1) anksiozno pričakovanje zavrnitev; 2) prikrivanje stigme oz. upravljanje z vidnostjo stigme zaradi stalno prisotnega tveganja viktimizacije; 3) ponotranjena stigme (Meyer, 2013, 2015). Pričakovanja zavrnitev so vir kognitivnega in čustvenega napora ter različnih negativnih občutkov (strah, sram, jeza itn.) (Rood et al., 2016). Pri upravljanju z (ne)vidnostjo stigme je glede na Pachankis (2007) potrebno upoštevati psihološke napore in določene vedenjske implikacije (npr. nenehne premisleke o potencialnih (ne)varnostih določenih okolij zaradi razkritja, strah pred neželenim razkritjem, prisilno socialno izoliranost od stigmatiziranih oseb na osnovi enakih osebnih okoliščin, nezmožnost avtentičnega življenja). Ponotranjena stigma pa je izrazito obstojen proces, ko oseba LGBTQ+ ponotranji negativna sporočila družbe o lastni identiteti LGBTQ+. Negativni vplivi ponotranjene stigme na osebe LGBTQ+ se kažejo na primer kot tveganje za samomorilno vedenje (Perez-Brumer et al., 2012), povišane občutke stresa (Lea et al., 2014), depresijo, anksioznost (Newcomb in Mustanski, 2010), zlorabo drog in alkohola (Weber, 2008).

Poleg stresorjev so ključni tudi procesi rezilientnosti in varovalni dejavniki, saj imajo oboji potencial zmanjševanja negativnih vplivov manjšinskega stresa med osebami LGBTQ+. Rezilientnost razumemo kot sposobnost preživeti in uspevati navkljub oteženim okoliščinam, ki jih narekujejo manjšinski stresorji. Med dejavnike rezilientnosti tako prištevamo vse obrambne strategije oseb LGBTQ+, institucionalne ukrepe, socialne mreže itn., ki na kakršenkoli način omejujejo vpliv stresorjev. Rezilientnost se pomembno razlikuje od soočanja s stresom v tem, da soočanje ne vodi nujno do zmanjšanega vpliva stresorjev, medtem ko rezilientnost vplive stresnih dejavnikov vedno tudi uspešno zmanjšuje. Rezilientnost nadalje delimo na individualne procese rezilientnosti (IPR) in skupnostne procese rezilientnosti (SPR) (Meyer, 2015).

IPR predstavljajo individualne značilnosti notranjega delovanja (npr. motivacija za spremembe), osebnostne značilnosti osebe (npr. ekstrovertiranost) in svetovni nazor osebe; le-ti vplivajo na zmožnost uspešnega soočanja z dejavniki manjšinskega stresa (Meyer, 2015). Hill in Gunderson (2015) v svojem pregledu literature navajata več IPR populacije LGBTQ+: 1) socialna motivacija (interes posameznice_ka za pridobivanje družbene podpore); 2) čustvena odprtost (zmožnost oseb LGBTQ+, da sprejmejo in predelujejo čustva, vezana na travmatične dogodke, saj bi jih naj poglobljeno razumevanje družbenega ozadja teh dogodkov in vzrokov zanje ščitilo pred negativnimi vplivi predsodkov); 3) optimizem in upanje v prihodnost, ki naj bi – prek povišane volje za premagovanje ovir in učinkovitejših strategij za soočanje s stresom – kljub oviram v okolju osebam LGBTQ+ omogočala lažje soočanje s trenutnimi manjšinskimi stresorji; 4) pozitivna identiteta LGBTQ+, ki vključuje pozitivne občutke do lastnega spola oz. spolne usmerjenosti in naj bi zviševala duševno zdravje ter omogočala boljše družbeno delovanje.

Meyer (2015) v okviru IPR izpostavi obstoj potencialnih tveganj, ko se raziskovalke_ci in strokovno osebje v praksi pretirano osredotočajo na IPR. To opozorilo temelji na ideji meritokracije, ki je še posebej značilna za kapitalistične države globalnega severa in predpostavlja, da imamo ljudje ne glede na različna izhodišča enake možnosti za družbeno mobilnost navzgor. Meyerjevo stališče je, da posameznice_ki zaradi neenakosti v družbenih strukturah nimajo enakih možnosti za rezilientnost, saj različni dejavniki (rasizem, seksizem, socioekonomski status) in mehanizmi neenakosti vplivajo na zmožnosti uspešnega odzivanja na stres. Kot ugotavlja Meyer (2015), pretirano izpostavljanje IPR vodi do diskurza, ki krivdo za negativne posledice manjšinskega stresa usmerja v žrtev oz. subjekt manjšinskega stresa, ki ni zmožen rezilientnega odziva na stresno situacijo. Posledično se prek tovrstnega diskurza pomembno zmanjša kolektivna odgovornost za zaščito skupin z osebnimi okoliščinami, ki v danih družbenih razmerah vodijo do številnih ranljivosti (Meyer, 2015). S tem tvegamo družbeno akcijo, ki bi se prekomerno usmerila v krepitev oseb LGBTQ+ za zmožnost soočanja z neenakostmi, namesto da bi bile moči usmerjene v izhodiščni problem – odpravljanje neenakosti, ki vodijo do negativnih izidov (Meyer, 2015; Riggs in Treharne, 2007).

Družbeno osredinjen pristop predstavljajo SPR, ki poudarjajo pomen in potencial skupnosti za krepitev rezilientnosti med mladimi LGBTQ+ (Meyer, 2015). Glede na Meyerjev model so razdeljeni na oprijemljive in neoprijemljive vire (po)moči, ki jih ponuja skupnost. Oprijemljive vire predstavljajo denimo dokumenti za zagotavljanje enakosti, specifične organizacije LGBTQ+, vzorniki LGBTQ+ itn. Na drugi strani pa neoprijemljive vire predstavlja zavzemanje za spremembe vrednot in norm v smeri večjega spoštovanja skupnosti LGBTQ+ (Meyer, 2015). Kwon (2013) v svojem pregledu literature navaja pozitivne posledice družbene podpore na duševno zdravje prek: zmanjšanega vpliva depresije in anksioznosti, manj osamljenosti, večjega zadovoljstva z življenjem in višjimi občutki lastne vrednosti ter pripadnosti. Družbena podpora je na primer še posebej učinkovita, ko so osebe LGBT+ v družbenih strukturah varno razkrite in ko je podpora vezana na spol in spolno usmerjenost.

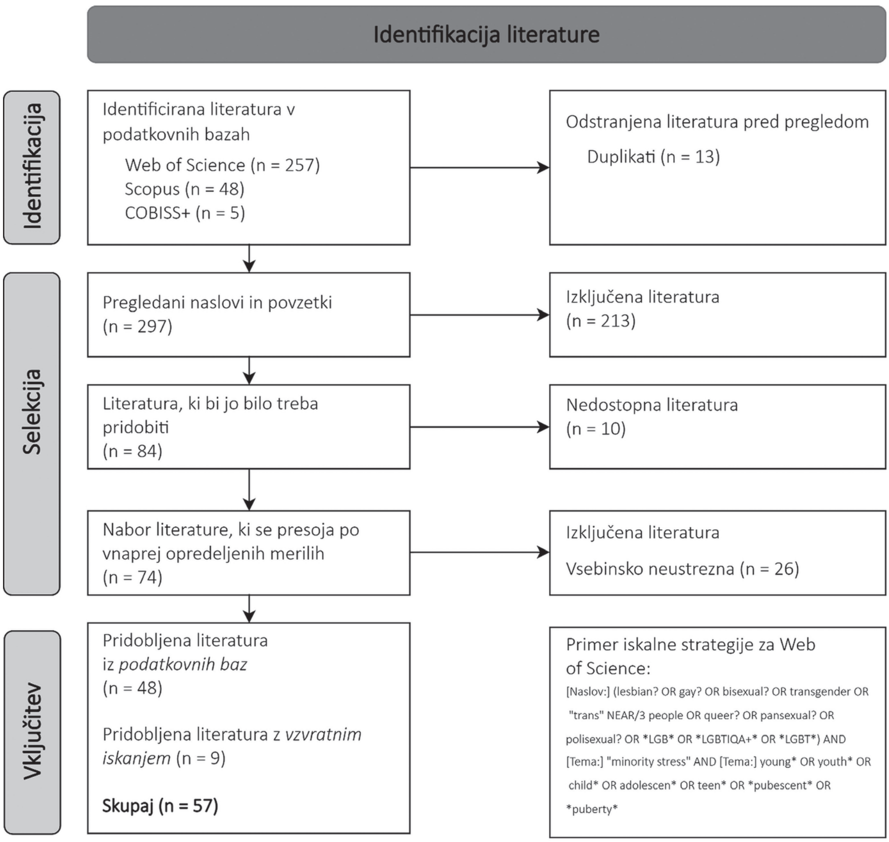
Kljub temu da v teoriji med IPR in SPR vlečemo jasne ločnice, sta v praksi koncepta tesno povezana. Za dostop do nekaterih skupnostnih virov rezilientnosti mladi LGBTQ+ namreč potrebujejo določene individualne vire rezilientnosti (Meyer, 2015). Podpora, ki jo ponuja skupnost LGBTQ+, je pogojena z določeno mero samoidentifikacije s skupnostjo. Na drugi strani na dostop do virov rezilientnosti v kontekstu intersekcionalnosti (Crenshaw, 1991) vplivajo tudi druge osebne okoliščine, npr. posebne potrebe, ekonomska situiranost družine, etnična pripadnost itn. (Meyer, 2015). V drugem delu besedila se osredotočamo na udejanjanje manjšinskega stresa v kontekstu VIZ ter s tem povezane posledice za mlade osebe LGBTQ+.

Metoda

Opravljen je bil sistematiziran integrativni pregled literature (Torraco, 2005; Post et al., 2020). Ta metodološki pristop je bil izbran zato, ker predvideva vključitev tako teoretičnih gradiv kot tudi kvalitativnih in kvantitativnih študij. Integrativni pregledi literature ne sodijo nujno med sistematične preglede literature (Torraco, 2005; 2016), vendar smo z namenom zagotavljanja večje mere objektivnosti in zanesljivosti pregled literature sistematizirale_i v skladu z bistvenimi smernicami za sistematične preglede literature. Pri tem smo sledile_i načelom The PRISMA 2020 statement (Page et al., 2021) in uporabile_i pripadajočo predlogo za prikaz postopka identifikacije literature v podatkovnih bazah (PRISMA 2020 diagram).

V marcu 2022 so bile sistematično pregledane podatkovne baze Web of Science, Scopus in COBISS+. Za iskanje literature smo uporabile_i kombinacijo ključnih besed in njihovih sinonimov, simbolov za krajšanje besed in Boolovih logičnih operatorjev ter operatorjev bližine. Od začetnih 310 prispevkov je bilo v končno analizo vključenih 48 prispevkov. Selekcijo smo opravile_i z izključevanjem ponavljajočih se prispevkov, s pregledom naslovov in povzetkov ter nazadnje s celostnim vsebinskim pregledom. K temu so bili dodani še najvidnejši prispevki (9), pridobljeni z metodo vzvratnega iskanja (Webster in Watson, 2002). V raziskavo so bili vključeni kosi gradiva, ki temeljijo na modelu manjšinskega stresa, se usmerjajo v raziskovanje mladih LGBTQ+ in se vsebinsko osredotočajo na tematike, ki so del VIZ-prostora (medvrstniški odnosi, kurikulum, šolska klima itn.) oz. so z njim povezane prek (družine) LGBTQ+ oseb. Izključile_i smo gradiva, ki so opredeljena kot pregledni članki ali zaključna dela in gradiva, ki so tematsko (zdravstvo, management itn.) ali kulturno (staroselska ljudstva, množična streljanja itn.) manj relevantna za slovensko VIZ-področje. Proces identifikacije gradiv v omenjenih podatkovnih bazah in metoda vzvratnega iskanja sta prikazana v sliki 1.

Slika 1: PROCES IDENTIFIKACIJE LITERATURE PREK PODATKOVNIH BAZ WEB OF SCIENCE, SCOPUS IN COBISS+ TER METODE VZVRATNEGA ISKANJA



Vir: lastni prikaz.

Kvalitativna vsebinska analiza je vključevala 57 kosov empiričnih in teoretičnih prispevkov. Gradivo je bilo urejeno v programu Nvivo in obdelano v skladu z deduktivnim pristopom kodiranja. Po vzoru Meyerjevega modela so bile določene enote kodiranja, izbrano besedilo je bilo kodirano, oblikovane so bile kategorije in na koncu teoretična formulacija (Mesec, 1998; Vogrinc, 2008). Oblikovani sta bili dve glavni kategoriji: 1) procesi manjšinskega stresa, ki jih obravnavamo v drugem prispevku, in 2) procesi rezilientnosti, ki so predmet pričujočega besedila. Tipološke značilnosti vključenih prispevkov so sledeče: 49 empiričnih znanstvenih prispevkov, 6 teoretičnih znanstvenih prispevkov, 1 kritična analiza dokumentov oz. konkretneje smernic za poučevanje vključujočih odnosov in spolne vzgoje v Združenem kraljestvu Severne Irske in Velike Britanije ter 1 komentar, ki ga lahko po slovenski tipologiji znanstvenih del uvrstimo v razdelek 1.21 (polemika, diskusijski prispevek, komentar). Večina empiričnih raziskav (tj. 44) je bila opravljenih v Združenih državah Amerike, od teh pa je ena raziskava vključevala tako udeleženke_ce iz ZDA kot iz Kanade. Ostale raziskave so bile opravljene v Avstraliji (1), Belgiji (1), na Irskem/v Nemčiji (1), v Italiji (1), na Nizozemskem (2) in Norveškem (1). Kljub temu da gre za različne družbeno-kulturne kontekste in vzgojno-izobraževalne specifike posameznih držav, ki jih ne moremo nekritično prenesti v slovenski prostor, ob tem ne bo odveč poudarek, da se v članku osredotočamo na rezilientnost mladih LGBTQ+ v okviru kateregakoli šolskega okolja, ne glede na kulturno-družbeno okolje. V tem smislu so tako individualni kot skupnostni procesi rezilientnosti, ki jih opredelimo v nadaljevanju, lahko skupni vsem mladim LGBTQ+ pri upravljanju z manjšinskim stresom ne glede na kulturno-družbeno okolje, v katerem se mladi LGBTQ+ izobražujejo.

Rezultati

V skladu z Meyerjevo opredelitvijo rezilientnosti v okviru modela manjšinskega stresa smo rezultate razdelili na individualne in skupnostne procese rezilientnosti (Meyer, 2015).

Individualni procesi rezilientnosti

Glede na opravljeno analizo se na IPR osredotočajo predvsem strokovnjaki_nje za duševno zdravje, zaradi česar se v kontekstu VIZ-sistema pojavljajo redkeje kot SPR.

Z manjšinskim stresom se mladi uspešno soočajo 1) s pomočjo humorja; 2) z zaupanjem, da ljudje okoli njih ne delujejo iz škodoželjnosti, vezanim na perspektivo o vseživljenjskem učenju; 3) z opominjanjem na kulturno in generacijsko razliko drugih ljudi; 4) s samozavestnim usmerjanjem pozornosti na svoje sposobnosti (Johns et al., 2021); 5) z asertivnim in ponosnim postavljanjem za svoje pravice in posledično varovanjem svojega ugleda; 6) s sprejetjem, da so distalni stresorji neizogiben del njihovih življenj; 7) z (za)upanjem, da bo prihodnost boljša; 8) z ljubeznijo do sebe; 9) z zaupanjem vase in 10) z zadovoljstvom s slogom življenja (Bry et al., 2018). Sprejemanje samega sebe z manjšim vplivom psihološkega stresa povezujejo tudi Woodford et al. (2014). Ob tem je bila pozitivna samopodoba povezana s pogostejšo uporabo storitev za potrditev spola, kar ima dvojen pozitiven učinek, saj procesi za potrditev spola varujejo duševno zdravje transspolnih oseb (Chodzen et al., 2019; Goldenberg et al., 2020). Poleg navedenega se je kot pomemben dejavnik pokazala tudi finančna neodvisnost tistih mladih LGBTQ+, za katere družina predstavlja vir distalnih in proksimalnih stresorjev (Bry et al., 2018).

V okviru tega dela analize je bila zaznana posebna oblika IPR, ki poteka vzporedno s SPR. Aktivizem se je v raziskavi Frost et al. (2019) izkazal kot dejavnik, ki ščiti zdravje in počutje oseb LGBTQ+ v povezavi z manjšinskim stresom in ekonomsko negotovostjo.

Skupnostni procesi rezilientnosti

V nadaljevanju se osredotočamo na skupnostne vire rezilientnosti, ki se neposredno navezujejo na VIZ-prostor in jih dopolnimo z viri, vezanimi na družine, za katere je bilo ocenjeno, da lahko ravno tako pomembno prispevajo k intervencijam znotraj šolskega polja. Najprej predstavljamo procese rezilientnosti, ki delujejo na institucionalni ravni, nato še tiste, ki so značilni za medosebne ravni.

Raziskava Goldbach et al. (2021) je proučevala učinkovitost enega izmed šolskih socialno-psiholoških programov za zmanjševanje posledic manjšinskega stresa, ki se izvaja v ZDA. Tovrstni programi imajo zmožnost za nižanje ravni manjšinskega stresa in specifično anksioznosti, strokovnemu kadru pa omogočajo, da mlade opremijo z orodji, ki jim pomagajo pri krmarjenju z manjšinskim stresom. Iz tega sledi, da bi morali biti VIZ-programi usmerjeni tudi v strukturne spremembe. V tem kontekstu Scandurra et al. (2021) sklepajo, da bi lahko pred leti implementiran dokument na nacionalni ravni za zaščito oseb LGBTQ+ v šolah prispeval k zmanjšani ravni manjšinskih stresorjev in s tem k zaznani višji splošni izobrazbi populacije LGBTQ+, kar bi morali še empirično preveriti. Poleg tega vpliv distalnih in proksimalnih stresorjev zmanjšujejo vključujoča stranišča in slačilnice, saj med transspolnimi osebami bistveno krepijo občutke varnosti, zmanjšujejo spolno disforijo, pozitivno vplivajo na duševno zdravje in ščitijo pred samomorom (Price-Feeney et al., 2021). Varno šolsko okolje se je kot ključen varovalni dejavnik izkazal tudi v raziskavi Jadva et al. (2021), ki navajajo, da osebe s pretežno pozitivno šolsko izkušnjo 40% redkeje poročajo o samopoškodbenem vedenju in 65% redkeje o poskusu samomora. Dodatno so se kot varovalni dejavniki pred samomorilnim tveganjem znotraj VIZ-sistema izkazale vključujoče prakse, ki: 1) aktivno delujejo proti pojavom mikroagresij (npr. raba pravilnih zaimkov, imen); 2) spoštujejo raznolikost spolov (npr. s spolno nevtralnimi stranišči); 3) javno izražajo spoštovanje do oseb LGBTQ+ prek različnih simbolov (npr. zastave ponosa, kvir knjige, video vsebine); 4) zagotavljajo prostor ter sredstva za aktivnosti medvrstniške podpore in zagovorništva (Jadva et al., 2021). Obenem sta se kot varovalna dejavnika za duševno zdravje oseb LGBTQ+ pokazala še občutek pripadnosti šoli (Hatchel et al., 2019) in splošno zmanjšanje ravni heteroseksizma v šolah (Woodford et al., 2014).

Na medosebni ravni so transspolne osebe v eni od raziskav (Johns et al., 2021) poročale o tem, da jim pri soočanju s strukturno diskriminacijo, predsodki in občutki izločenosti znotraj šolskega prostora pomagajo: 1) vzpostavljene vezi z zaposlenimi in vrstnicami_ki; 2) poskusi sodelovanja z zaposlenimi na šoli, ki so namenjeni doseganju vključujočih sprememb; 3) možnosti za opozarjanja na izključujoče programe in prakse (npr. stranišča, slačilnice); 4) možnosti za predlaganje in uresničevanje sprememb (informiranje o zaimkih in izbranih imenih, odzivanje na nasilje). V raziskavah je bil izpostavljen tudi pomen drugih družbenih odnosov, npr. romantičnih partnerskih odnosov, v okviru katerih imajo mladi občutek varnosti, intime in povezanosti. Poleg tega so se kot varovalna pokazala prijateljstva z drugimi osebami LGBTQ+, konkretno v navezavi na tvegana vedenja, povezana s kajenjem (Johns et al., 2013; Johns et al., 2021), čeprav so nekatere osebe dodale, da so tovrstna prijateljstva redka, saj v nekaterih šolah ni oz. je premalo razkritih oseb (Johns et al., 2021). Pomen prijateljstva z drugimi osebami LGBTQ+ nakazuje podatek, da so se mlade osebe o svoji samomorilnosti najpogosteje pripravljene zaupati ravno drugim osebam LGBTQ+, ljudem s podobno izkušnjo in specifičnim organizacijam LGBTQ+ (Chang et al., 2020). Vloga teh organizacij se pokaže predvsem v okviru povezovanja VIZ-ustanov s širšim lokalnim okoljem (Bry et al., 2018).

Dodatno so raziskave razmeroma pogosto naslavljale pomen družine. Kot faktor pozitivnega vpliva na razvoj mladih oseb LGBTQ+ se je v raziskavah pokazalo ozaveščanje skrbnic_kov oseb LGBTQ+ v okviru šolskega sistema (npr. informacije o trans spoštljivi vzgoji in dokazih o tveganjih, ki jih predstavlja nesprejemanje). Ena od možnih podpor šole mladim osebam LGBTQ+ pri soočanju z manjšinskim stresom v okviru družine je mediacija v okviru šolske svetovalne službe med mladimi osebami LGBTQ+ in njihovo družino (Austin et al., 2022; Bry et al., 2018; Grossman et al., 2021). Na tak način je možno aktivirati družinske vire in povišati podporo staršev oseb LGBTQ+. Ključna je predvsem družinska podpora, ki je vezana neposredno na spolno usmerjenost mladih LGBTQ+, saj Feinstein et al. (2014) ugotavljajo, da – v primerjavi z generalizirano podporo – pozitivne učinke prinaša le specifična podpora, ki zmanjšuje raven manjšinskega stresa ter depresivne simptome in je povezana z manjšim številom izkušenj diskriminacije ter redkejšimi pričakovanji zavrnitve. Med transspolnimi mladimi se je podpora staršev izkazala kot dejavnik, ki vpliva na redkejše pojavljanje depresivnih simptomov, nižje ravni stresa v povezavi z razkrivanjem in boljše splošno duševno zdravje transspolnih mladih (Grossman et al., 2021). Mlade osebe LGBTQ+ izpostavljajo še pomen izbrane družine, ki v marsikaterem primeru uspešno nadomešča sovražno oz. nenaklonjeno izvorno družinsko okolje. Ena_eden izmed udeleženk_cev v raziskavi Bry et al. (2018: 1449) izbrano družino opisuje:

> *Imaš družino in imaš sorodnice_ke. Ljudje, ki ne stojijo za tabo in te ne podpirajo pri vsem, kar si, in pri vsem, kar delaš – to so sorodnice_ki. Ljudje, ki podpirajo vse, kar si, in vse, kar delaš, in te imajo radi ne glede na vse – to je družina. Poznavanje razlike med temi ljudmi ti lahko pomaga prebroditi marsikaj.*

Podporna izvorna družina je v marsikaterem primeru pomemben varovalni dejavnik, a tudi dejavnik tveganja, če mladi v njej doživljajo različne oblike nasilja in zavračanja (Bry et al., 2018).

Razprava in sklep

Pričujoči rezultati kažejo na velik potencial, ki ga ima šolsko okolje za uspešno spodbujanje rezilientnosti pri mladih LGBTQ+. Med IPR imajo osrednjo vlogo predvsem strokovnjaki_nje za duševno zdravje, ki lahko z različnimi oblikami terapij uspešno krepijo osebne vire rezilientnosti mladih oseb LGBTQ+, vezanih na duševno zdravje. Poleg tega se je v primeru, ko je vir stresa izvorno družinsko okolje, kot rezilienten dejavnik izkazala finančna neodvisnost mladih oseb.

Kot opozarja Meyer (2015), je IPR in SPR na določenih mestih težko jasno razmejiti. V okviru obravnavanega tematskega področja to zlasti velja za že omenjeno finančno neodvisnost in aktivizem mladih LGBTQ+. Finančno neodvisnost izpostavljajo osebe, ki jim izvorna družina predstavlja (pre) velik vir proksimalnih in distalnih stresorjev. Finančna samostojnost mladim LGBTQ+ omogoča, da se iz okolja, ki ni varno, umaknejo, kar pa za izobražujoče mlade osebe predstavlja velik izziv, saj so razpete med izobraževanjem, zagotavljanjem finančnih sredstev in iskanjem varne namestitve, ob tem pa običajno še vedno potrebujejo podporo odraslih. Ker tovrstni izzivi predstavljajo pomembno tveganje za izpad iz izobraževalnega sistema in za splošno zdravje mladih oseb (McCann in Brown, 2019; Shelton in Bond, 2017), je ključno, da se za mlade v takih situacijah zavzamejo tudi šolske svetovalne službe. Ustreznih sistemskih rešitev v Sloveniji ni, zaradi česar se tovrstne težave težko razrešujejo. Parcialne rešitve se nanašajo predvsem na sodelovanje s centri za socialno delo, ki upravljajo krizne namestitve za otroke in mladostnice_ke, in Društvom Parada ponosa, ki skuša odgovarjati na problematiko brezdomstva mladih LGBTQ+ z zagotavljanjem začasnih bivanjskih rešitev (Ferbežar et al., 2021; SQVOT, b. d.).

Druga skupina procesov, ki se gibljejo med IPR in SPR, predstavlja različne oblike aktivizma mladih LGBTQ+, ki so se glede na pregled literature izkazale kot pomemben vir moči (Frost et al., 2019; Johns et al., 2021). Možnost sprožitve in udejanjanja sprememb v okolju za osebe LGBTQ+ poleg zmanjševanja občutkov ekonomske negotovosti in manjšinskega stresa na splošno (Frost et al., 2019) – glede na nekatere druge raziskave – predstavlja podporo pri soočanju s preteklo travmo; pomaga živeti bolj avtentično življenje; povečuje občutke varnosti, smisla in povezanosti z okoljem; zmanjšuje občutke strahu in vzbuja upanje za boljšo prihodnost (Scheadler et al., 2022). Poleg tega zmanjšuje enega izmed ključnih proksimalnih stresorjev – ponotranjeno homofobijo (Montagno in Garrett-Walker, 2021), ki ima številne negativne vplive na duševno zdravje mladih LGBTQ+ in njihova življenja na sploh (Chodzen et al., 2019; Edwards in Sylaska, 2013; Hatzenbuehler in Pachankis, 2016). Učenke_ci LGBTQ+ lahko zaposlenim pri načrtovanju in uresničevanju vključujočih sprememb v VIZ-sistemu predstavljajo ključno podporo, saj posedujejo znanje iz izkušenj in so za spremembe visoko motivirane. Tovrstna vpletenost pa lahko, kadar je preobremenjujoča in ne izhaja iz želje oseb LGBTQ+, negativno vpliva na njihova življenja. Johns et al. (2021) zato opozarjajo na potencialne nevarnosti, ko so učenke_ci LGBTQ+ preobremenjene_i z reševanjem težav, ki bi morale biti odgovornost ustanove in zaposlenih. Nepremišljeno vključevanje mladih LGBTQ+ v proces optimizacije pomeni prevzemanje odgovornosti učenk_cev LGBTQ+ za obstoj lastne viktimizacije, za katero ne nosijo nikakršne krivde (Goldbach et al., 2021). V takih primerih bi bila najbolj ustrezna rešitev vključitev organizacij, v katerih so marsikje zaposlene razkrite in opolnomočene osebe, ki so se za to poslanstvo odločile_i in za svoje delo tudi prejemajo plačilo. Spremembe se tako ne načrtuje brez vključenosti oseb LGBTQ+, vendar se obenem ne preobremeni učenk_cev LGBTQ+. Vključevanje nevladnih organizacij LGBTQ+ pri vzpostavljanju in ohranjanju spoštljivega šolskega okolja se je glede na pregled literature izkazala kot pozitivna rešitev v tujini (Bry et al., 2018; Chang et al., 2020), zato predpostavljamo, da bi enako veljalo za Slovenijo, kar predlagajo tudi Perger et al. (2018). Na to lahko navežemo izsledke raziskave o stališčih srednješolskih učiteljic_ev o izkušnjah s homofobijo v šolah, ki kažejo na neusposobljenost večine šolskega kadra za naslavljanje tematik LGBTQ+ in soočanje s homofobnim nasiljem (Magić, 2013), zato je nujna aktivacija zunanjih virov, dokler področje izobraževanja pedagoških kadrov o tematikah LGBTQ+ ostaja neurejeno. Omenjeno poročilo je sicer že staro, zato bi potrebovali novejše podatke in raziskave s pokritostjo celotne izobraževalne vertikale, ki bi poleg tega vključevale še teme transspolnosti in transfobije. Ob tem ni nezanemarljivo, da primerjava podatkov iz raziskav 2003–2004 in 2014–2015 o pojavnosti nasilja nad lezbijkami in geji kaže, da se je odstotek tistih, ki so potrdile_i, da so v osnovni oz. srednji šoli pri pouku obravnavale_i teme homoseksualnosti, zmanjšal s 55 % na 46 % (Kuhar in Švab, 2019). To kaže na širši strukturni problem, ki tudi zaradi nenaslavljanja tematik LGBTQ+ v šolskem prostoru tako dopušča kot reproducira pojave nasilja nad mladimi LGBTQ+ v VIZ-prostoru.

SPR v VIZ-okolju so vezani predvsem na vzpostavljanje varnega okolja in odpravljanje heteroseksističnih/transfobnih dejavnikov. Raziskavi Goldbach et al. (2021) in Scandurra et al. (2021), ki sta bili vključeni v pregled literature, kažeta na to, da lahko državni in institucionalni dokumenti pomembno zmanjšujejo pojave proksimalnih in predvsem distalnih stresorjev. Dodatno raziskava Bradlow et al. (2017) opozarja, da na šolah s pravilniki, ki specifično obsojajo homo- in bifobno nasilje, obstaja manjša verjetnost za medvrstniško nasilje na podlagi spolne usmerjenosti v primerjavi s šolami, ki tovrstnega nasilja ne obsojajo neposredno. V šolah z ustrezno urejenimi pravilniki obstaja manjša verjetnost, da bi osebe LGBTQ+ skrbelo doživljanje nasilja in večja verjetnost, da bi nasilje prijavile. Ti podatki kažejo na to, da pojave distalnih (npr. nasilje) in proksimalnih (npr. pričakovanje nasilja) stresorjev lahko zmanjšujejo dokumenti na ravni ustanov, ki specifično prepovedujejo nasilje na podlagi spola in spolne usmerjenosti. Glede na ugotovitve, ki jih podata Kuhar in Švab (2019), se nasilje nad lezbijkami in geji v šolskem prostoru povečuje, saj je leta 2003 o nasilju s strani sošolk in sošolcev zaradi spolne usmerjenosti poročalo 22 % oseb, v letu 2014 pa je bilo teh že 44 %. Avtorici_ja to pripisujeta različnim dejavnikom, tako večji vidnosti gejev in lezbijk v šolskem prostoru kot tudi senzibilnosti anketiranih za prepoznavo nasilja. V šolskem prostoru je glede na Perger et al. (2018) vsakdanje nasilje nad LGBTIQ+ osebami normalizirano, saj ga tudi učitelji_ce skozi lastno neaktivnost in pasivnost dopuščajo. A ne glede na to bi lahko ravno omenjeni pravilniki vplivali na vzpostavitev varnega okolja in zmanjšanja tveganja za nasilje nad mladimi LGBTQ+ v VIZ-okolju, kar bi vsekakor predstavljajo sistemsko spremembo.

V okviru SPR posebej izpostavljamo tudi tematiko vključujočih toalet in slačilnic, ki predstavlja eno izmed najbolj kontroverznih vprašanj. Raziskava Price-Feeney et al. (2021) je pokazala, da vključujoča stranišča in slačilnice bistveno zmanjšujejo elemente manjšinskega stresa, saj se transspolne osebe zaradi njih počutijo varneje, doživljajo manj spolne disforije in poročajo o pozitivnih učinkih na duševno zdravje. Poleg naštetega se je izkazalo, da vključujoča stranišča ščitijo pred samomorom, ki med transspolno populacijo predstavlja veliko tveganje. Slovenska raziskava s področja vsakdanjega življenja transspolnih oseb je pokazala, da ima 58 % vključenih v raziskavo izkušnje s samomorilnimi mislimi in 26 % s poskusom samomora. V poročilu za VIZ-ustanove predlagajo, da vsa stranišča spremenijo v spolno nevtralne prostore ali pogojno zagotovijo vsaj eno spolno nevtralno stranišče (Koletnik, 2019).

Zaradi disfunkcionalnosti družinskih dinamik, ki se praviloma pojavljajo spričo predsodkov bioloških bližnjih, so mlade osebe LGBTQ+ še posebej ranljive za socialno izključenost. Družbeno podporo zato iščejo v tesnih prijateljskih odnosih z ostalimi osebami LGBTQ+, ki presegajo tradicionalen pomen prijateljstva in prehajajo v vrsto družinske oblike, za katero najpogosteje uporabljamo izraz izbrana družina (Bry et al., 2018; Hull in Ortyl, 2019). Ta oblika podpore se je kot SPR izkazala tudi v našem pregledu literature (Bry et al., 2018). Gre za prijateljice_e, ki v marsikaterem primeru prevzemajo vloge, tradicionalno pripisane biološkim družinskim članicam_om, in nudijo na primer oporo pri procesih razkrivanja, ob starševski zavrnitvi in tekom grajenja manjšinske spolne identitete (Dewaele et al., 2011). Te v marsikaterem primeru predstavljajo najmočnejši in najbolj konsistenten vir družbene podpore (Hull in Ortyl, 2019), zaradi česar lahko sposobnost skupnosti LGBTQ+ za oblikovanje izbranih družin označimo za ključen dejavnik, ki spodbuja rezilientnost in jim omogoča obvladovanje kompleksnih in marginaliziranih življenjskih kontekstov (Dewaele et al., 2011). Šolske svetovalne službe lahko za krepitev rezilientnosti pri mladih osebah LGBTQ+ raziščejo možnosti za krepitev in izkoriščanje potenciala izbranih družin.

Opravljen integrativni pregled literature kaže, da imajo VIZ-ustanove v življenjih mladih oseb LGBTQ+ izredno pomembno vlogo, saj so eden izmed največjih virov manjšinskega stresa, hkrati pa predstavljajo ključno izhodišče rezilientnosti. Slednjo je v VIZ-prostorih glede na analizirane raziskave mogoče krepiti z raznolikimi varovalnimi mehanizmi, ki predstavljajo velik potencial za vzpostavitev varnejšega VIZ-okolja za učenke_ce LGBTQ+, zaradi česar je podobne empirične raziskave o manjšinskem stresu potrebno opraviti tudi v slovenskem VIZ-prostoru. Ravno izpostavljene slovenske raziskave kažejo, da konkretni raziskovalni potencial leži tako na manjšinskem stresu kot na procesih rezilientnosti mladih LGBTQ+ v slovenskem VIZ-prostoru, saj lahko rezultati predstavljajo podlago za konkretne sistemske rešitve, ki bi mladim LGBTQ+ omogočile varnejšo izobraževalno izkušnjo. Poleg tega bi bilo smiselno raziskati še morebitni obstoj razlik pri upravljanju z manjšinskim stresom ter razlike med IPR in

SPR mladih LGBTQ+ glede na različne tuje vzgojno-izobraževalne sisteme in druge kulturno-družbene kontekste.

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Steven O'Connor in
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Foreign Fighters and Multinational Armies: From Civil Conflicts to Coalition Wars, 1848–2015
Routledge, London in New York
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Leta 2022 je britansko-ameriška založba Routledge izdala knjigo z naslovom »Mednarodni borci in večnacionalne oborožene sile: Od državljanskih konfliktov do koalicijskih vojn, 1848–2015« (*Foreign Fighters and Multinational Armies: From Civil Conflicts to Coalition Wars, 1848–2015*), ki sta jo uredila Steven O'Connor in Guillaume Piketty. Sama knjiga je razdeljena na tri tematske sklope. Urednika sta prispevala uvod, v katerem sta poudarila pomen pričujoče knjige kot prepleta transnacionalne in vojaške (vojne) zgodovine, ki presega tako pod- kot nadnacionalno raven. Skoraj 150-letni razpon vpletenosti tujih pripadnikov oboroženih sil je prikazan prek posameznih prispevkov različnih avtorjev.

Prvi sklop je posvečen vplivu tujerodnih vojakov in borcev v sklopu Longue duréeja. Prvo poglavje je delo zgodovinarja Petra H. Wilsona z naslovom Tuja vojaška delovna sila v evropski tranziciji k moderni (*Foreign military labour in Europe's transition to modernity*). V prispevku avtor ugotavlja, kako so bili tujerodni vojaki v zgodovini vedno del evropskih vojska, pri čemer so predstavljali pomemben element v oboroženih konfliktih med 16. in 19. stoletjem. Toda z oblikovanjem modernih nacionalnih držav v poznem 19. stoletju in koncepta oboroženih državljanov so tujerodni pripadniki skoraj popolnoma izginili iz evropskih vojska.

David Malet je avtor naslednjega poglavja z naslovom Delavci sveta, združite se! Komunistični tujerodni borci 1917–91 (*Workers of the world, unite! Communist foreign fighters 1917–91*). V nasprotju s tujerodnimi vojaki iz predhodnih stoletij, ki so se vojskovali v drugih vojskah predvsem z vidika preživljanja (oz. pridobivanja finančnih sredstev), pa se je v 20. stoletju razširil koncept ideološko motiviranih tujerodnih pripadnikov. Na primeru komunizma oz. Sovjetske zveze avtor tako analizira pomen in obliko tega transnacionalnega projekta, ko je ena država širom sveta spodbujala, koordinirala in vodila vojaške operacije s končnim ciljem širjenja ideologije.

Zadnji del prvega sklopa je prispeval Nir Arielli (Tujerodni borci in vojni prostovoljci: med mitom in resnico; *Foreign fighters and war volunteers: between myth and reality*). Poglobil se je v splošno, a velikokrat napačno predstavo, kaj je sploh tujerodni pripadnik oz. prostovoljec v vojni. Hkrati se spopada tudi z mitom o (nadpovprečnemu) pomenu tujcev na bojišču, a vseeno pritrjuje pomenu tujerodnih prostovoljcev, ki imajo lahko močan propagandni pomen kot tudi vpliv na oblikovanje mednarodne percepcije konflikta.

Drugi sklop je namenjen analizi motivacije in izkušenj tujerodnih borcev. Prvo poglavje drugega sklopa je delo Anthonyja J. Cadeja; v njem se posveti vprašanju motivacije Nemcev, ki so se borili na zvezni strani med ameriško državljansko vojno (*Why they fought: the initial motivations of German American soldiers who fought for the Union in the American Civil War*). Nemci, ki so prišli v ZDA pred izbruhom državljanske vojne, so se množično odzvali pozivom k prostovoljnemu služenju in so nato predstavljali največji (tujerodni) kontingent v zvezni vojski. Avtor tako ugotavlja, da se je – v nasprotju s splošnim prepričanjem, da so bili Nemci (le) najemniki (kot njihovi predniki, ki so se borili proti Američanom v času osamosvojitvene vojne) – skoraj četrt milijona Nemcev oz. ameriških državljanov nemškega rodu prostovoljno borilo v vojni predvsem zaradi osebnih razlogov, pa tudi prepričanja, da se morajo bojevati za (novo) domovino, ki jih je sprejela. Z ideološkega vidika je bil pomemben element tudi nasprotovanje plemstvu in sužnjelastništvu (kar so v novem svetu figurativno predstavljali lastniki plantaž in sužnjev). Med drugimi motivatorji so bili tudi religija, politični nazor in moralna ideologija.

Naslednje poglavje drugega sklopa govori o prisotnosti zahodnih (evropskih) vojakov v vojski otomanskega imperija v 19. stoletju (*»Me among the Turks?«: Western commanders in the Late Ottoman Army and their self-narratives*). Houssine Alloul tako razkriva nekatere zahodne vojaške poveljnike, ki so iz različnih motivov pristali v oboroženih silah imperija, ki je nekaj stoletij prej predstavljal poglavitno (zunanjo) grožnjo krščanskemu svetu. Med njimi so tako bili begunci (ki so izgubili lastne vojne, lastne domovine), ubežniki pred (vojaško) pravico, iskalci bogastva in pustolovci, a tudi klasični najemniki. Medtem ko so nekateri v otomanski službi ostali le krajši čas, je veliko zahodnjakov prestopilo v islam in so do konca življenja ostali zvesti novi domovini, pri čemer so nekateri dosegli tudi zelo visoke (vojaške ali politične) položaje.

Poglavje z naslovom *»The recognized adjunct of modern armies«: foreign volunteerism and the South African War*, delo Matthewa Kennedyja in Chrisa Holdridgea, se ukvarja z zadnjo veliko vojno 19. stoletja in sicer južnoafriško vojno (1899–1902). Pri tem je zanimivo, da so se tujerodni pripadniki borili na obeh straneh, a večinoma prav na strani dveh burskih republik. Medtem ko so se nekateri tujci dejansko borili v vrstah komandosov, je večina tujcev pristala v nebojnih službah kot v posebnih tujskih enotah. S tem je južnoafriška vojna postala tudi prototip sodobnih oboroženih konfliktov, saj se je ponovno »normalizirala« prisotnost tujerodnih pripadnikov v sklopu nacionalnih konfliktov.

Sledi poglavje o delovanju nizozemskih borcev med špansko državljansko vojno, ki ga je napisal Samuël Kruizinga (*Fear and Loathing in*

Spain. Dutch Foreign Fighters in the Spanish Civil War). Okoli 700 Nizozemcev se je pridružilo mednarodnih brigadam v boju proti španskemu fašizmu, a njihova vojaška sposobnost je bila podpovprečna, tako da so iz njihovih vrst oblikovali samostojno nizozemsko enoto bolj z namenom dviga morale kot vojaške učinkovitosti. Pri tem avtor ugotavlja, da je bila percepcija njihove vojaške (ne)sposobnosti tudi posledica diskriminacije, ki jo je izvajalo vodstvo mednarodnih brigad. Pri tem je tudi zanimivo, da večina prostovoljcev ni bila članov komunistične partije, a je kljub temu percepcija nizozemskega kontingenta v Španiji vplivala tako na percepcijo nizozemske komunistične partije v domovini kot tudi v okviru komunistične internacionale.

Zadnji, tretji sklop je namenjen prispevkom, ki se nanašajo na koalicijsko vojskovanje med drugo svetovno vojno. Prvo poglavje v tem sklopu (*»Not on a purely nationalistic basis«: the internationalism of Allied coalition warfare in the Second World War*), delo Th. W. Bottelierja, se posveča vprašanju vzpostavitve, oblikovanja in delovanja mednarodne koalicije, ki se je borila proti silam osi. V nasprotju z dosedanjo literaturo se avtor ni posvetil političnim voditeljem, ki so (so)oblikovali koalicijo, ampak je preučil delovanje številnih (pod)odborov, ki so oblikovali združeno zavezniško politiko in vojaške operacije. Medtem ko so nekateri s koncem vojne prenehali delovati, pa so drugi nadaljevali z delovanjem v sklopu zahodnozavezniškega političnega in vojaškega sodelovanja.

Naslednji prispevek Stevena O'Connorja se še bolj poglobi v sodelovanje britanskih in svobodnih francoskih sil v času puščavske vojne leta 1942 (*The Free French and British Forces in the Desert War, 1942: the learning curve in interallied military cooperation*). Svobodne francoske sile so tako po okupaciji francoske domovine nadaljevale boj proti nemško-italijanskim silam, pri čemer so bile povezane z britanskimi silami. Poglavje tako razkriva problematiko integracije dveh različnih vojaških sil (z vidika opreme, ideologije in izkušenj), ki je bila uspešno rešena prek (britanskih) povezovalnih častnikov, ki so bili dodeljeni svobodnim francoskim silam in so nato predstavljali francoske sile v britanskem poveljstvu. To je posledično izboljšalo vojaško sposobnost francoskih sil, ki so se na afriškem bojišču borile tudi proti svojim sodržavljanom iz vrst vichyjske Francije.

Zadnje poglavje v knjigi, delo Paula Lenormanda (*The Palestinian triangle: Czechoslovaks, Jews and the British Crown in the Middle East, 1940–1943*), predstavlja posebno izkušnjo večnacionalnega elementa v sklopu transnacionalnega zavezništva. Po razkosanju Češkoslovaške se je več deset tisoč Čehov in Slovakov odločilo, da bo v tujini nadaljevalo z odporom. V Palestini so tako oblikovali bataljon, sestavljen iz Čehov, Slovakov, češkoslovaških Nemcev in palestinskih Judov češkoslovaškega rodu, ki je bil podrejen britanskemu poveljstvu. Bataljon je nadaljeval z uporabo češkoslovaške (vojaške) zakonodaje kljub nasprotovanju nekaterih častnikov, pri čemer pa so se znotraj kontingenta začela tudi nasprotovanja na podlagi narodnosti (Čehi, ki so predstavljali večino moštva in poveljstva, so se srečevali z obtožbami glede razpada skupne države in tiranije v bataljonu). Skoraj polovico moštva pa so predstavljali Judi (po rasni, verski ali nacionalni pripadnosti). Vseeno pa so skupaj izoblikovali novo kulturo, novo idejo sobivanja v večnacionalni enoti (če že ne v državi), medtem ko so se borili na afriškem bojišču.

Nabor prispevkov v predstavljeni knjigi dobro prikazuje evolucijo tujerodnih pripadnikov (v sklopu nacionalnih vojaških organizacij), kot tudi nazorno dokazuje, da bodo tujci še naprej sodelovali v oboroženih konfliktih drugih držav, pri čemer pa se spreminja njihova motivacija. Medtem ko so konec srednjega in v začetku novega veka prevladovali najemniki in pustolovci, dandanes prevladujejo ideološko motivirani tujerodni prostovoljci. Tudi najnovejši oboroženi konflikt na evropskih tleh, ruska invazija na Ukrajino, dokazuje, da se bodo tujci vedno borili za druge države.

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Nikola Tesla
Problem povečevanja človeške energije, s posebnim ozirom na pridobivanje energije Sonca
ZRC SAZU, Ljubljana 2021,
594 strani, 29,00 EUR
(ISBN 978-961-05-0520-4)

Knjiga *Problem povečevanja človeške energije s posebnim ozirom na pridobivanje energije Sonca* je izšla leta 2019 pri Založbi ZRC SAZU in založbi Litera. Potem ko je bila prva izdaja nepričakovano hitro razprodana, je leta 2021 izšla dopolnjena in razširjena izdaja. Obe izdaji obsegata prevod 70 strani dolgega poljudnoznanstvenega traktata Nikole Tesla, ki ga spremlja 300 strani obsežna študija Tiborja Hrsa Pandurja; v drugi izdaji jo je avtor dopolnil, razširil in predelal: dodal je nove vire in izbor pisem, ki so zamenjali v prvi izdaji priložene patente.

Nikola Tesla (1856–1943) je traktat *Problem povečevanja človeške energije s posebnim ozirom na pridobivanje energije Sonca* prvič objavil leta 1900 v junijski številki Century Magazine. Delo je nastalo na osnovi spoznanj, do katerih se je dokopal v letih 1899 in 1900, ko je eksperimentiral z brezžično postajo v mestu Colorado Springs, ki jih je nadgradil z raziskovanjem in razvojem brezžičnega sistema prenosa električne energije. Med letoma 1901 in 1907 je Tesla gradil postajo Wardenclyffe na Long Islandu v New Yorku, ki je pomenila opredmetenje teh novih spoznanj, vendar postaja ni bila nikoli dokončana in na koncu je bila povsem uničena. Te uvide je Tesla nadgradil z razmisleki o družbi, vojni in družbenotransformativnih tehnologijah, pa o možnosti izdelave »samogibnega toplotnega motorja«, ki bi pogonsko moč črpal iz okolja, ali »teleavtomata« oziroma daljinskega upravljanja ladjice (to je razumel kot robota, s čimer je napovedal razvoj umetne inteligence).

Aktualnost njegovih zamisli je očitna; Tesla je prepoznal problematičnost izkoriščanja fosilnih goriv, ki poganjajo eksponentno rast, oprto na neobnovljive naravne vire, in razmišljal o alternativi, ki bi presegala »potrato in porabo kateregakoli materiala« ali ki ne bi temeljila na prevladi bogatih nad revnimi; razvijal je samozadostne, trajnostne sisteme produkcije in distribucije energije, ki bi temeljili na etiki ohranjanja življenja in »znanstvenega človekoljuba«; zastavil je novo vizijo razvoja človeštva, oprto na drugačne sisteme produkcije energije.

Spremna študija v drugi izdaji prinaša razširjeno in dopolnjeno tolmačenje Teslove razprave, in sicer s sodobne perspektive razkriva predvsem tehnično, politično in ekonomsko ozadje njegove brezžične postaje Wardenclyffe, ki pojasnjuje, zakaj je postaja imela takšno usodo. Dopolnjena pa je študija tudi s tem, da »sooča različne interpretacije Teslovega dela, s posebnim poudarkom na njegovi družbeni in spoznavni teoriji, kozmologiji ter filozofiji« (Pandur).

Razširitev študije v drugi izdaji gre torej v več smeri: najprej prinaša ključne raziskave številnih fizikov. Omenimo raziskave bratov Corum, ki z matematičnimi analizami dodatno osvetljujejo razumevanje Teslove tehnologije v jeziku sodobnih elektroinženirjev ter razvoja sodobnih pospeševalnikov, radiofrekvenčnega procesiranja moči, Andrije Puharicha in Ernsta Willema van den Bergha, ki pojasnjuje Teslovo razumevanje »kozmičnih žarkov«, pa tudi »umetne inteligence«, ki se po Teslovem prepričanju ne bi smela utelešati samo v digitalni avtomatizaciji in robotizaciji, kot se to dogaja danes, temveč tudi v avtomatiziranem sistemu pridobivanja energije in njeni brezžični distribuciji.

Druga smer razširitve se navezuje na nov in doslej v slovenščino še nepreveden sklop pisem, ki govorijo o izmenjavi mnenj in idej med Teslom in njegovim urednikom Century Magazina Robertom Underwoodom Johnsonom med nastajanjem njegovega prelomnega teksta; ta korespondenca na posrečen način kontekstualizira traktat, ko razkriva milje in okoliščine, v katerih je Teslovo delo nastajalo, kar nedvomno plemeniti sporočljivost knjige same.

Tretja smer razširitve pa je vezana na sodobno raziskavo sintropije kot možnega novega načina pridobivanja električne energije fizika in izumitelja Andreja Detele.

Druga izdaja torej prinaša z najrazličnejših perspektiv osvetljene Teslove ideje in eksperimente, ki so po eni strani oprte na filozofska in ideološka ozadja, po drugi pa so podvržene političnim in ekonomskim dejavnikom, ki so preprečevali ali ovirali uresničevanje njegovih izumov in teorij iz obdobja med letoma 1900 in 1943, ki ga razumemo kot drugo fazo njegovega ustvarjanja.

Tesla je na nek način že leta 1900 svaril pred prekomernim izkoriščanjem neobnovljivih energetskih virov ter se usmeril v razvoj emancipacijskih tehnologij, ki naj bi pripomogle k energetski enakopravnosti človeštva ali k preseganju tedanje ekonomije pomanjkanja. Dandanes si je težko predstavljati, da bi lahko brez zavesti o okoljski in ekološki pravičnosti ter razviti ekološki zavesti sploh gradili tretji, tehnološki svet, s katerim bi lahko ohranjali prvi, naravni svet, v katerem bi lahko naprej živela vsa živa bitja, hkrati pa tudi ustrezno razvijali drugi, družbeni svet, v katerem bi bilo omogočeno vsem človeškim bitjem dostojno živeti.

Odlika, ki jo spremna študija prav tako izpostavlja pri Tesli, pa je dandanes pri znanstvenikih redek holistični pristop, ki je Tesli omogočal, da je predvideval, kakšen učinek bo imela uporaba določene tehnologije na družbo in naravo; to pa je kvaliteta, ki bi morala v današnjem času navdihovati predvsem tehnično orientirane inovatorje.

Naj izpostavimo še ugotovitev Pandurja, da se Teslove futuristične napovedi danes uresničujejo prav v nasprotni smeri; tako razvoj robotov in daljinsko upravljanje vozil ne gre ravno v smeri preprečevanja vojn, s čimer bi se zagotovil »večni mir«, in avtomatizacije proizvodnih procesov, ki bi človeštvo osvobodila težkega fizičnega dela.

Spremna študija tako pokaže na pomembnejše interpretativne strategije delovanja Teslovih tehnologij, predstavi njegov pogled na svet, ki je močno vezan na tedaj uveljavljene miselne tokove (od pozitivizma, progresivizma do transnacionalizma) in, če hočete, pokaže na njegov »tehnološki determinizem«, ki ga je krepil v prepričanju, da bosta znanstveni napredek in nova tehnologija rešila večino materialnih problemov človeštva ipd.

Tako lahko skozi prvo in dopolnjeno drugo izdajo *Problema povečevanja človeške energije, s posebnim ozirom na pridobivanje energije Sonca* uzremo Teslova ekološka in pluralistična prizadevanja, ki so v kontradikciji z njegovo intenco po obvladovanju narave. Prav ta dvojnost, ki jo tako lahko razberemo pri Tesli, pa je vgrajena v sedanje prevladujoče okoljske diskurze kot odraz realnih protislovnih tendenc kapitalističnega načina produkcije XXI. stoletja. V tem oziru nam poznavanje Teslovega etičnega gonila, ki vznika iz njegove vznemirljive filozofije znanosti, dandanes premalo poznane, in obširnega dokumentiranega zgodovinskega ozadja pomaga pri postavljanju vprašanj, usidranih v protislovja kapitalistične družbe, s katerim usmerjamo svojo radovednost in nadaljnja raziskovanja tako na tehnološki, družbeni in okoljski ravni posamezno kot tudi v njihovih medsebojnih povezavah in interakcijah.

Druga izdaja, tako razširjena, pa pridobiva še na družbeno-političnem pomenu, saj v zgodovinski perspektivi razkriva notranje omejitve, ki so vgrajene v sam politično-ekonomski sistem kapitalistične družbe XX. stoletja in ki so ovirale ali celo preprečile implementiranje revolucionarno drugačnih tehnoloških rešitev, kot jih načrtoval Tesla. Protislovna narava teh omejitev se v tem stoletju ni spremenila, zato lahko sklenemo s trditvijo, da je monografija *Nikola Tesla: Problem povečevanja človeške energije, s posebnim ozirom na pridobivanje energije Sonca* še kako aktualna in pomembna za razumevanje razmerja med tehnologijo, družbo in naravo, zaostrenega vse do eksistencialne ravni, do ravni preživetja; razumevanje protislovnosti šele ponuja adekvatno izhodno strategijo iz sedanjega občutka ujetosti v brezizhodnost.

Mitja DURNIK: ALI JE KONCEPT LIBERALNEGA INTERACIONALIZMA V ZUNANJI POLITIKI EU ONEMOGOČIL NJENO DELOVANJE V MEDNARODNIH KONFLIKTIH?
Teorija in praksa, Ljubljana 2023, let. LX, št. 1, str. 5–23

Ideje o moči v zunanji politiki Evropske unije in njeni vlogi v mednarodnih odnosih so bile po svojem izvoru pretežno liberalne. Razlog za to je bil v tem, da je imela EU v času hladne vojne posebno vlogo, po njej pa se je pojavljala bolj kot moralna, etična in normativna sila. Glavni razlog, da bi delovala kot velika sila ali velesila, je bil verjetno pomanjkanje vojaških zmogljivosti. Razlika med materialističnimi in nematerialnimi elementi moči je bila ključna točka spora med realisti in liberalnimi misleci. V mednarodnih odnosih (to je evidentno tudi v primeru ukrajinske krize) smo vedno bolj priča tudi trendu, da EU uporablja tudi geopolitični pristop, poleg normativnega. V članku smo primerjali različne koncepte zunanje politike EU glede moči v luči realizma in liberalizma, pri čemer smo poleg deskriptivne metode uporabili tudi SWOT-analizo.

Ključni pojmi: realizem, liberalizem, moč, Evropska unija, Ukrajina, zunanja politika, mednarodni odnosi

Matevž MALČIČ: POLITIČNA POLARIZACIJA V SLOVENIJI TER NJENI VPLIVI NA LIBERALNO DEMOKRACIJO
Teorija in praksa, Ljubljana 2023, let. LX, št. 1, str. 24–47

Morebitna povezava med naraščajočo politično polarizacijo in strahom pred avtokratizacijo v Sloveniji sproža zaskrbljenost. Soočeni s pomanjkanjem empiričnih podatkov bi radi odgovorili na dve vprašanji. Prvo je: kakšen je bil razvoj politične polarizacije v Sloveniji? Prikažemo, da je Slovenija doživela visok vzpon ideološke in afektivne polarizacije, tako na ravni državljanov kakor tudi političnih strank. Naše drugo vprašanje zadeva učinek politične polarizacije na liberalno demokracijo v Sloveniji. GLS-model od 1992 do 2022 potrdi negativni učinek afektivne, vendar ne ideološke polarizacije na V-Dem-ova indikatorja liberalne demokracije in sodnih omejitev izvršilne veje oblasti..

Ključni pojmi: Slovenija, afektivna polarizacija, ideološka polarizacija, avtokratizacija, SJM

Sebastjan JERETIČ: HEGEMONIJA, MORALA IN ČUSTVA:
MOČ V NEVRALNI ARHITEKTURI ČLOVEŠKEGA UMA
Teorija in praksa, Ljubljana 2023, let. LX, št. 1, str. 48–67

Za aktualno razpravo o krizi demokracije so pomembni trdni epistemološki temelji za analizo volilnih rezultatov in manifestacije moči kot pristanka. V članku je predstavljen biopsihosocialni model hegemonije kot orodja za manifestacijo moči v človeškem umu. Koncept, kot ga je postavil Gramsci, je razvit s Foucaultovim razumevanjem moči kot represije ali samoumevnega ustvarjanja. Koncept je nadalje razvit v paradigmi utelešenega uma na temelju ugotovitev iz psihologije in nevroznanosti o procesih ustvarjanja spomina in ustvarjanja pomena, pri čemer je poudarjena vloga čustev.

Ključni pojmi: hegemonija, morala, čustva, volitve, biopsihosocialni model, mentalne reprezentacije, utelešeni um

Arben FETOSHI, Dren GËRGURI: OBLIKOVANJE MEDIJSKE AGENDE
O VOJNI V UKRAJINI: VPLIV TELEVIZIJE NA KOSOVEM
Teorija in praksa, Ljubljana 2023, let. LX, št. 1, str. 68–89

V članku obravnavava dejavnike, ki vplivajo na oblikovanje medijske agende o vojni v Ukrajini na Kosovem. Zaradi kompleksne situacije na Zahodnem Balkanu in konteksta napetosti med Kosovim in Srbijo, predstavljena raziskava pojasni vlogo televizije v hibridnem medijskem okolju kot najpomembnejši vir informacij v času krize. V raziskavi ugotavljava, kako televizija vpliva na to, kako javnost vidi vojno v Ukrajini, in kako je poročala o razmerah pred in po napadu na Ukrajino. Na empirični ravni sva uporabila kombiniran metodološki pristop, sestavljen iz priprave vprašalnika, spremljanja televizije, vsebinske analize in teoretičnega raziskovanja. Na tej ravni sva med 1. februarjem in 31. marcem 2022 analizirala 716 novic ter v aprilu in maju 2022 izvedla anketo med 1312 respondenti s Kosova, da bi ugotovila, kateri dejavniki vplivajo na oblikovanje agende in kako vplivajo na mnenje o vojni v Ukrajini. Rezultati raziskave kažejo, da je vojna v Ukrajini osrednji predmet poročanja televizijskih postaj na Kosovem, učinki njihovega poročanja pa se razlikujejo glede na demografske značilnosti publike.

Ključni pojmi: oblikovanje agende, okvirjanje, Kosovo, javno mnenje, Ukrajina, vojna

Arash BEIDOLLAHKHANI: REGULIRANOST POLITIČNIH VED V JUŽNOKOREJSKEM IN TAJVANSKEM AKADEMSKEM KONTEKSTU: VZROKI IN POSLEDICE
Teorija in praksa, Ljubljana 2023, let. LX, št. 1, str. 90–108

Demokratizacija in gospodarska rast azijskih tigrov, zlasti Južne Koreje in Tajvana, sta prinesla strukturne spremembe v akademskih sistemih teh držav, zlasti na področju političnih ved in mednarodnih odnosov. V članku z metodo analize z opazovanjem in zgodovinsko-sociološkim mehanizmom podajam celovit in hibriden pogled na reguliranost političnih ved v akademskem okolju (univerzitetnih sistemih) vzhodnoazijskih držav, s posebnim poudarkom na Južni Koreji in Tajvanu. Povzamem ugotovitve in zagovarjam trditev, da sta peterokotni sistem demokratičnega državljanstva (pravnega, političnega, kulturnega, socialnega in ekonomskega) ter vzpostavitev strukturnih in posodobljenih političnoekonomskih odnosov z velesilami v mednarodnem sistemu dva glavna dejavnika, ki prispevata k prilagoditvi političnih ved v vzhodnoazijskih državah, vključno z Južno Korejo in Tajvanom. Članek sklenem z ugotovitvijo, da je poleg razvoja mednarodnih in nacionalnih dogodkov v Južni Koreji in na Tajvanu tudi na področju političnih ved v obeh državah prišlo do strukturnih sprememb ter postaja bolj regulirano in strukturirano.
Ključni pojmi: Južna Koreja, Tajivan, politične vede, demokracija, institucija

Eva ERJAVEC, Tjaša REDEK: VPLIV DIGITALIZACIJE IN INVESTICIJ V NEOTIPLJIV KAPITAL NA NEFINANČNO USPEŠNOST PODJETIJ V SLOVENIJI
Teorija in praksa, Ljubljana 2023, let. LX, št. 1, str. 109–135

Članek preučuje vpliv digitalizacije in investicij v neotipljiv kapital na nefinančno uspešnost podjetij v Sloveniji. Digitalizacija je izjemnega pomena za konkurenčnost podjetij, vendar pa so podjetja, ki hkrati veliko vlagajo tudi v neotipljiv kapital, uspešnejša. Članek analizira razmerja (1) med digitalizacijo in nefinančno uspešnostjo podjetij; (2) med digitalizacijo in odnosom podjetja do digitalizacije; (3) med naložbami v neotipljiv kapital in nefinančno uspešnostjo podjetja, pri čemer (4) pričakujemo tudi razlike po panogah in med podjetji, ki so vključena v globalne vrednostne verige. SEM z uporabo anketnih podatkov kaže, da je vpliv stopnje digitalizacije in naložb v neotipljiv kapital na nefinančno uspešnost pozitiven in statistično značilen. Pričakovana stopnja digitalizacije je odvisna od pomembnosti digitalizacije (prek zaznane strateške pomembnosti), pomembnost digitalizacije pa od pričakovanih dolgoročnih koristi digitalizacije v podjetju. Stopnja digitalizacije je odvisna od pričakovanih dolgoročnih koristi digitalizacije, ki sicer pozitivno, a statistično neznačilno vpliva na stopnjo digitalizacije v podjetju. Agilnost podjetja vpliva na pomen digitalizacije za podjetja, manj statistično značilno od pričakovanih koristi, a še vedno zelo pomembno. Nadalje rezultati kažejo, da je vpliv mednarodne menjave (izvoz in uvoz v EU15 in druge trge EU) na pomen digitalizacije pozitiven, a precej šibek in statistično neznačilen, podobno pa je vpliv mednarodne menjave na nefinančno uspešnost, čeprav pozitiven statistično neznačilen.

Ključni pojmi: neotipljiv kapital, digitalizacija, uspešnost podjetja

Helena KOVAČIČ: ZDRAVJE NA DELOVNEM MESTU V SLOVENIJI
Teorija in praksa, Ljubljana 2023, let. LX, št. 1, str. 136–150

Članek razpravlja o sistemskih vprašanjih glede podatkov o varnosti in zdravju pri delu (VZD) in pri tem upošteva pristop na dveh nivojih. Na ravni posameznikov analiziramo pojavnost primerov na področju VZD, ki prikazuje zdravstveno stanje zaposlenih v Sloveniji. Na operativni ravni analiziramo podatke o upravljanju sistema VZD in prikažemo sistem spremljanja VZD. Naša analiza pokaže, da v Sloveniji podatki o zdravju delovne populacije temeljijo na odločitvah delodajalcev – namesto na zdravnikih medicine dela, ki spremljajo zdravstveno stanje delavcev. Sistem VZD zasleduje zadoščanje normativnih zahtev namesto rednega spremljanja aktivnosti VZD. Članek predlaga sprejetje sistemskih ukrepov, ki bi povezali ločene akterje na področju VZD in medicino dela znova integrirali v zdravstveni sistem.

Ključni pojmi: medicina dela, zdravje na delovnem mestu, varnost pri delu, poklicne bolezni, poškodbe pri delu, Slovenija

Nika FERBEŽAR, Marko GAVRILOSKI: RESILIENCE OF LGBTQ+ YOUTH IN THE EDUCATION CONTEXT: AN INTEGRATIVE LITERATURE REVIEW
Teorija in praksa, Ljubljana 2023, Vol. LX, No. 1, pp. 151–169

Educational institutions hold the potential to reduce the impact of minority stress on the lives of LGBTQ+ youth. In this paper, we focus on the resilience of LGBTQ+ youth in the school environment. The presented integrative review of the literature included 57 empirical and theoretical papers. Qualitative content analysis showed the educational environment can act as an important source of community resilience processes for LGBTQ+ students, while they have a smaller role to play in strengthening individual resilience processes. Areas not directly related to the school environment were also found to be important; in these areas, the engagement of school professionals is desirable for the optimal development of LGBTQ+ youth.

Keywords: LGBTQ+ youth, education, resilience, minority stress, gender, sexual orientation, systematised integrative literature review

NAVODILA AVTORICAM IN AVTORJEM

Teorija in praksa sprejema v presojo za objavo izvirna znanstvena besedila, ki še niso bila objavljena drugje ali niso v recenzentskem postopku pri kateri drugi znanstveni reviji oziroma monografiji. Objava članka ali knjižne recenzije v Teoriji in praksi je brezplačna.

Besedilo pošljite na elektronski naslov teorija.praksa@fdv.uni-lj.si. Besedilo naj bo v formatu A4 z 1,5-vrstičnim razmikom, tip črk Times New Roman, velikost 12, obojestransko poravnano, z robovi 2,5 cm. Vse strani besedila morajo biti zaporedno oštevilčene. Ime in priimek avtorice/avtorja naj bo izpisano na posebni naslovni strani pod naslovom prispevka, skupaj s strokovnim nazivom in trenutno zaposlitvijo, s polnim naslovom, telefonsko številko in naslovom elektronske pošte. Priimek avtorice oziroma avtorja naj bo izpisan z velikimi tiskanimi črkami. Prva oziroma začetna stran besedila naj vsebuje le naslov besedila in povzetek besedila. Besedilo mora spremljati izjava avtorice oziroma avtorja, da besedilo še ni bilo objavljeno oziroma ni v pripravi za tisk pri kateri drugi znanstveni reviji ali monografiji. Avtorica/avtor naj v izjavi navede svoj predlog uvrstitve besedila v skladu s tipologijo dokumentov/del (izvirni, pregledni članek ali knjižna recenzija) za vodenje bibliografij v sistemu COBISS. O končni uvrstitvi odloča uredništvo revije.

ČLANKI

Znanstveni članki v slovenskem ali angleškem jeziku naj ne presegajo 6.500 besed. V kolikor želi avtorica oziroma avtor objaviti daljše besedilo, naj se o tem predhodno posvetuje z glavnim urednikom. Članek naj bo opremljen s povzetkom v slovenskem in angleškem jeziku v obsegu do 100 besed. Povzetek naj vsebuje natančno opredelitev teme besedila, metodo argumentacije in zaključke. Avtorica/avtor naj navede tudi do sedem ključnih pojmov, tako v slovenskem kakor tudi v angleškem jeziku. Naslovi morajo biti jasni in povedni. Glavni naslov, izpisan s krepkimi velikimi tiskanimi črkami, ne sme presegati dolžine 100 znakov. Besedila, daljša od 1.500 besed, morajo vsebovati podnaslove, ki so lahko največ dvonivojski. Podnaslovi druge ravni naj bodo tiskani poševno.

Tabele, grafi in slike morajo biti izdelani kot priloge (in ne vključeni v besedilo) z jasnimi naslovi, pri čemer naj avtorica/avtor uporabi velike tiskane črke v poševnem tisku; biti morajo zaporedno oštevilčeni (Slika 1: NASLOV SLIKE, Graf 2: NASLOV GRAFA, Tabela 3: NASLOV TABELE). Vsaka tabela in slika mora biti izpisana na posebnem listu papirja. V besedilu naj bo okvirno označeno mesto, kamor sodi. Avtorica/avtor naj pri vsaki tabeli, grafu in sliki opredeli, koliko prostora zavzema v besedilu. Tabele, grafe in slike naj avtorica/avtor šteje v obseg besedila bodisi kot 250 besed (pol strani) ali 500 besed (celotna stran). Pod tabelami in grafi je potrebno navesti vir. Navedba vira naj se zaključi s piko. Uporabljajte orodje za oblikovanje tabel v programu Word.

Tabela 1: UČINEK ODBOROV

Regulativni učinek	Mešani učinek	Distribucijski učinek
BUDG, TRAN, IMCO,	ECON, ENVI, ITRE, LIBE	EMPL, AGRI, PECH, REGI
JURI, AFET, DEVE, INTA	JURI, AFET, DEVE, INTA	JURI, AFET, DEVE, INTA

Vir: Yordanova, 2009: 256.

Opombe morajo biti v besedilu jasno označene z zaporednimi številkami od začetka do konca, napisane na ustreznem mestu v besedilu in po enakem vrstnem redu razvrščene pod besedilom. Število in dolžina opomb naj bo omejena. Opomba o avtorici/avtorju in morebitna zahvala naj vključujeta informacije o organizacijski pripadnosti avtorice/avtorja, ki so relevantne za obravnavano problematiko v besedilu, ter o finančnih in drugih pomočeh pri pripravi besedila.

Dobesedni navedki, ki so dolgi tri ali več vrstic, naj bodo postavljeni v poseben odstavek, robovi odstavka naj bodo obojestransko zamaknjeni, besedilo naj bo v poševnem tisku in brez narekovajev.

> *Če so gibanja za pravice vložila svoja telesa v aktivizem in mobiliziranje novih oblik diskurza, da bi tako omajala njihovo marginalizacijo in zatiranje, so filozofske in teoretske kritike kartezijanstva na novo pretehtale subjekt in ga opredelile kot hkrati razsrediščenega (ki v sebi ni v celoti koherenten) In utelešenega (ne čisti "kogito").* (Jones, 2002: 239)

RECENZIJE KNJIG

TIP sprejema v objavo recenzije domačih in tujih znanstvenih del, ki niso starejša od dveh let. Recenzija naj ne bo daljša od 1.500 besed. V recenziji naj se avtorica/avtor dosledno izogiba navajanju literature in virov. Recenzija naj ne vsebuje naslova ali podnaslovov. Na začetku recenzije naj navede podatke o sebi in recenzirani knjigi v spodaj navedeni obliki:

Ime PRIIMEK
Institucionalna pripadnost

Ime in priimek avtorja knjige
Naslov knjige: podnaslov
Založnik, Kraj letnica objave, število strani, cena (ISBN številka)

Janez NOVAK
Fakulteta za družbene vede, UL

Eviatar Zerubavel
Time Maps: Collective Memory and the Social Shape of the Past
The University of Chicago Press, Chicago in London 2003, 184 str., 25.00 $ (ISBN 0-226-98152-5)

NAVAJANJE

Osnovna oblika reference v besedilu je (Novak, 1994). Za navajanje strani naj avtorica oziroma avtor uporablja naslednjo obliko navajanja: (Novak, 1994: 27–29). Če sta avtorja reference dva, naj avtorica oziroma avtor navede oba: (Novak in Kosec, 2007). Če je avtorjev reference več, naj se v tekstu uporablja naslednja oblika navajanja: (Novak et al., 1994: 27), v seznamu LITERATURE pa naj se navedejo vsi avtorji. Če avtorica oziroma avtor besedila ne uporablja prve izdaje knjige, naj pri navajanju zabeleži tudi letnico prve izdaje: (Novak, 1953/1994: 7). Več referenc hkrati naj avtorica oziroma avtor loči s podpičjem: (Novak, 1994: 7; Kosec, 1998: 3–4; 2005: 58). Pri navajanju večjega števila referenc enega avtorja, objavljenih v istem letu, naj avtorica oziroma avtor reference med seboj loči s črkami a, b, c itd.: (Novak, 1994a: 27–29; Novak, 1994b: 1), in sicer v zaporedju, v kakršnem se prvič pojavijo v besedilu.

Seznam referenc sodi na konec besedila in naj ima podnaslov LITERATURA. V seznam referenc naj avtorica oziroma avtor vključi vso uporabljeno literaturo. Morebitne vire naj navede za seznamom referenc, in sicer s podnaslovom VIRI. Seznam referenc mora biti urejen po abecednem redu priimkov avtorjev referenc ter v primeru istega avtorja po časovnem zaporedju izdaj.

Knjige

Priimek, ime (letnica izdaje knjige): Naslov knjige: Podnaslov. Kraj: Založba.
Geertz, Clifford (1980): Negara: The Theatre State in Nineteenth Century Bali. Princeton, NJ: Princeton University Press.

Zborniki

Priimek, Ime (ur.) (letnica izdaje knjige): Naslov knjige: Podnaslov. Kraj: Založba.
Featherstone, Mike (ur.) in Mike Hepworth (ur.) (1991): The Body: Social Process and Cultural Theory. London: SAGE Publications.

Samostojni sestavek ali poglavje v monografiji

Priimek, Ime (letnica izdaje monografije): Naslov prispevka v zborniku. V: Ime Priimek urednika (ur.), Naslov zbornika, strani prispevka. Kraj: Založba.
Palan, Ronen (1999): Global Governance and Social Closure or Who is to Governed in an Era of Global Governance? V: Martin Hewson (ur.) in Thimothy J. Sinclar (ur.), Approaches to Global Governance Theory, 55–72. Albany: State University New York Press.

Članki

Priimek, Ime (letnica izida članka): Naslov članka. Ime revije letnik (številka): strani.
Bachrach, Peter in Morton S. Baratz (1963): Decisions and Nondecisions: An Analytical Framework. American Political Science Review 57 (3): 632–42.

Svetovni splet (WWW)
Priimek, Ime (letnica): Naslov. Dostopno prek Internetni naslov, datum dostopa.
Deluze, Gilles (1978): Spinoza. Dostopno prek http://www.imaginet.fr/deluze/TXT/420178.html, 10. 1. 2001.

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Avtorica oziroma avtor naj smiselno navede čim več podatkov o viru, kot so na primer avtor vira, mesto oziroma institucija, v kateri se vir nahaja, naslov, ime ali opis vira, evidenčna številka vira, naslov spletne strani, kraj in leto nastanka vira in podobno. Pri tem je smiselnost navajanja opredeljena kot zmožnost sledenja viru oziroma zmožnost intersubjektivne preverljivosti uporabljenega vira. Avtorica oziroma avtor naj navede tudi datum, ko je bil vir pridobljen, če gre za elektronski vir.

Priimek, Ime (letnica nastanka vira): Naslov/nosilec vira. Mesto hranjenja vira. Dostopno prek Internetni naslov, datum dostopa.
Koprivec, Daša (2005–2008): Avdio kasete. Kustodiat za slovenske izseljence in zamejce SEM. Dostopno prek http://www.imaginet.fr/deluze/TXT/420178.html, 10. 1. 2010.
ali
Luthar, Breda, Samo Kropivnik, Tanja Oblak, Blanka Tivadar, Mirjana Ule, Slavko Kurdija in Samo Uhan (2006): Življenjski stili v medijski družbi 2001. Ljubljana: Fakulteta za družbene vede, Arhiv družboslovnih podatkov.

Če gre za vir iz zasebnega arhiva avtorja članka, kakega drugega raziskovalca ali posameznika, naj bo to jasno navedeno. Navajanje identitete lastnika vira iz zasebnega arhiva je zaželeno, vendar ne nujno, kadar gre za zaščito njegovih materialnih pravic ali varovanje njegove osebne identitete.

Priimek, Ime morebitnega avtorja (morebitna letnica nastanka vira): Ime ali opis vira/arhivska številka. Mesto hranjenja vira. Zasebni arhiv.

Zbirka navijaških šalov. Avtoštoparski muzej, Kanal ob Soči. Zasebni arhiv Mirana Ipavca.
ali
Zbirka pisem Janeza Novaka. 1953–1989. Privatni arhiv.
Avtorica oziroma avtor naj v primeru znanega avtorja in leta nastanka vira

uporabi enako določilo o navajanju v besedilu članka, kot je to v primeru navajanja članka, prispevka v monografiji ali monografije. Kadar avtor in leto nastanka vira nista znana, naj avtorica oziroma avtor v besedilu članka smiselno uporabi naslov, ime ali opis vira. V primeru, da so naslov, ime ali opis vira daljši od petih besed, naj avtorica oziroma avtor pri navajanju vira smiselno uporabi začetne besede iz naslova, imena ali opisa vira tako, da bo nedvoumno razpoznavno, kateri v seznamu literature navedeni vir navaja.

(Poročilo o delu državnega zbora, 2000)
ali

(Zbirka navijaških šalov)

Glede ostalih dodatnih oblik navajanja uporabljene literature ali virov naj se avtorica oziroma avtor obrne na uredništvo TIP.

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Uredništvo TIP uporablja za vse vrste člankov in za knjižne eseje obojestransko anonimni recenzentski postopek. Članke in knjižne eseje recenzirata vsaj dva recenzenta. Postopek recenziranja, od oddaje besedila do seznanitve avtorice/avtorja z recenzentskimi mnenji, traja dva meseca. Uredništvo TIP lahko brez zunanjega recenziranja zavrne objavo besedila, če ugotovi, da avtorica oziroma avtor besedila ni pripravil v skladu z zgoraj navedenimi navodili, ali pa če oceni, da besedilo ne sodi na znanstveno področje, ki ga revija pokriva.

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Original or review articles written in the English language (British English) should not exceed 6,500 words. If the author wishes to publish a longer text, they should first consult the Editor. An article should be accompanied by an abstract of up to 100 words, written in both Slovenian and English, containing a definition of the subject under scrutiny, methods of argumentation, and conclusions. The author should also provide up to seven key words. The titles should be clear and indicative. The main title, printed in bold uppercase letters, should not exceed 100 characters. Texts longer than 1,500 words should contain subtitles of no more than two levels. The subtitles of the second level should be italicised.

Tables, graphs and figures should be designed as attachments (and not included in the text), with informative titles, in uppercase letters and italics; they should be numbered consecutively (Figure 1: TITLE OF FIGURE, Graph 2: TITLE OF GRAPH, Table 3: TITLE OF TABLE). Each table and figure should be on a separate sheet. Their approximate positions in the text should be marked in the text. The author should determine how much space each table, graph or figure will occupy in the text. The space required for tables, graphs and pictures should be included in the total text length, as either 250 words (1/2 page) or 500 words (1 page). The sources of tables and graphs should be written below the table and graph and should end with full-stop. Use the table feature in Word to create tables.

Table 1: COMMITTEE EFFECT

Relugative effect	Mixet effect	Distributional effect
BUDG, TRAN, IMCO,	ECON, ENVI, ITRE, LIBE	EMPL, AGRI, PECH, REGI
JURI, AFET, DEVE, INTA	JURI, AFET, DEVE, INTA	JURI, AFET, DEVE, INTA

Source: Yordanova, 2009: 256.

Footnotes should be clearly marked in the text with consecutive numbers from beginning to end; written in appropriate places in the text; and arranged in the same order under the text. Footnotes must be limited in both number and length. Notes about the author/s, as well as any acknowledgements, should include information on the organisation to which the author/s belongs when relevant to the subject addressed in the text, and should also include information regarding any financial or other assistance given for preparing the text.

Quotations of three or more lines in length should be placed in a separate centre-aligned paragraph, with the text appearing in italics and without inverted commas.

> *The fact that most of the posts have been liked is an evidence that citizens find the posts made by the local government interesting and useful, but they do not show any further interest by sharing the information with friends or by engaging in dialog commenting on them.* (Bonsón et al., 2013: 12)

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First Name LAST NAME
Institutional affiliation

Author's First and Last Name
Title: Subtitle
Publisher, City Year of publication, number of pages, price (ISBN number)

John SMITH
Oxford University

Eviatar Zerubavel
Time Maps: Collective Memory and the Social Shape of the Past

University of Chicago Press, Chicago and London 2003, 184 pages, USD 25.00 (ISBN 0-226-98152-5)

REFERENCES

The basic form of an in-text reference is (Smith, 1994). To indicate the page, use the following form: (Smith, 1994: 27–28). If two authors are referred to, they should both be stated: (Smith and Doe, 2007). When there are three or more authors, the following form should be used: (Smith et al., 1994: 27), while all authors should be mentioned in the reference list. If the author does not use the first edition of the book, the year the first edition was published should also be given: (Smith, 1953/1994: 7). Several simultaneous references should be separated by a semicolon: (Smith, 1994: 7; Doe, 1998: 3–4; 2005: 58). When citing several references by the same author published in the same year, references should be separated by letters a, b, c etc.: (Smith, 1994a; 27–29; Smith 1994b: 1) in the order they first appear in the text.

The list of references should be placed at the end of the text, under the heading BIBLIOGRAPHY. It should only include units of literature used in the text. Sources should be listed after the list of references under the heading SOURCES. The bibliography should be arranged in alphabetical order of the last names of the authors and, in the case of multiple works by the same author, by the consecutive order of editions.

Books

Last Name, First Name (year of publication): Title of the Book: Subtitle. City: Publisher.

Geertz, Clifford (1980): Negara: The Theatre State in Nineteenth Century Bali. Princeton, NJ: Princeton University Press.

Edited Books

Last Name, First Name (ed.) (year of publication): Title of the Book: Subtitle. City: Publisher.

Featherstone, Mike and Mike Hepworth, Bryan S. Turner (eds.) (1991): The Body: Social Process and Cultural Theory. London: SAGE Publications.

Chapters or Essays in Monographs

Last Name, First Name (year of publication): Title of the Chapter/essay in the Edited Book. In First Name Last Name of the editor (ed.), Title of the Edited Book, pages of the chapter/essay. City: Publisher.

Palan, Ronen (1999): Global Governance and Social Closure or Who is to Be Governed in an Era of Global Governance? In Martin Hewson and Timothy J. Sinclair (eds.), Approaches to Global Governance Theory, 55–72. Albany: State University New York Press.

Articles
Last Name, First Name (year of publication): Title of the Article: Subtitle. Name of Journal Volume (Number): pages.
Bachrach, Peter and Morton S. Baratz (1963): Decisions and Nondecisions: An Analytical Framework. American Political Science Review 57 (3): 632–642.

Internet (WWW)
Last Name, First Name (year of publication): Title. Accessible at Internet address, date of access.
Deluze, Gilles (1978): Spinoza. Accessible at http://www.imaginet.fr/deluze/TXT/420178.html, 10. 1. 2001.

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Featherstone, Mike (2005–2008): Audio cassettes. National Museum of New Zealand. Available at http://www.imaginet.nz/deluxe/TXT/420178.html, 10. 1. 2010.
or
Activity Report of the National Assembly of Republic of Slovenia, 1996–2000. Ljubljana: National Assembly of the Republic of Slovenia, 2000.

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or
Collection of letters by Janez Novak. 1953–1989. Private archives.

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(Activity Report of the National Assembly, 2000)
or
(Collection of supporters' scarves)
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