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David ELLERMAN

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VSEBINA / CONTENTS

ČLANKI / ARTICLES

David ELLERMAN ARE CORPORATIONS THE PROBLEM?	7-24
Jasna MIKIĆ LJUBI, Monika KALIN GOLOB, Jožica ČEHOVIN ZAJC, Igor LUKŠIČ, Aleksandra KANJUO MRČELA RAZUMEVANJE MOŠKOSTI MED SREDNJEŠOLSKO MLADINO V SLOVENIJI	25-47
Volety NAGA SREEDHAR, Parameswar NAYAK, Nadindla SRIVIDYA THE INDIAN EARNING COUPLE – ROLE STRESSORS, INTER-ROLE CONFLICT AND MODERATION IMPACT OF WORKPLACE SOCIAL SUPPORT	49-74
Elmedina NIKOČEVIQ-KURTI INSIGHTS CONCERNING HOW STUDENTS VIEW THE IMPACT OF TECHNOLOGY IN LIFELONG LEARNING	75-94
Tjaša POTOČNIK A DYADIC APPROACH TO ADDRESSING THE UNMET NEEDS OF CAREGIVING DYADS: ANALYSIS OF THE INCLUSIVENESS OF THE SLOVENIAN LONG-TERM CARE ACT	95-108
Mitja ŽAGAR PERCEPCIJE PRIPADNIKOV DRUŽBENIH MANJŠIN O LEGITIMNOSTI KRIZNEGA UPRAVLJANJA MED PANDEMIJO COVIDA-19: PREDSTAVITEV REZULTATOV TERENKEGA RAZISKOVANJA	109-128

Alenka KRAŠOVEC, Tina KOGOVŠEK NEZAUPANJE, NEZADOVOLJSTVO ALI NEZNANJE? KVALITATIVNA ANALIZA NEVELJAVNIH GLASOVNIC NA VOLITVAH V EVROPSKI PARLAMENT	129–146
Marko LOVEC SLOVENIAN ATTITUDE TO THE WAR IN UKRAINE: POLITICAL IDEOLOGIES, PUBLIC OPINION AND POLICY COSTS	147–170
Patrik REBRICA, Vladimir PREBILIČ DOKTRINI KIBERNETSKEGA VOJSKOVANJA RUSIJE IN UKRAJINE	171–188
Davorin ŽNIDARIČ RUDARSKO INDUSTRIJSKA REGIJA ZASAVJE, SKOZI RAZLIČNE OBLIKE (NE)PRAVIČNOSTI	189–204

PRIKAZI, RECENZIJE / BOOK REVIEWS

João Vale de Almeida: The Divorce of Nations: A Diplomat's Inside View on the Global Order Collapses (Simona LESKOVAR)	205–207
Miša Djurković: Fašizam u našoj epohi (Marko HOČEVAR)	208–211

David ELLERMAN*

ARE CORPORATIONS THE PROBLEM?**

Abstract. *Are corporations the problem? Can reforms in the area of corporate responsibility (e.g., more stakeholder governance) lead to any real changes? The goal of the article is to analyse debates concerning the Citizens United case, corporate personhood, the stakeholder theory, the affected interests principle and, finally, deeper fallacies with respect to the rights of capital embedded in Marxism and conventional economic theories of capital and corporate finance. The last analysis considers another institution at the root of the problems of the current economic system: the renting of human beings in the employment relationship – which has also corrupted the original idea of a corporation that dates back to medieval times.*

Keywords: *corporate personhood, employment or human rental relationship, fundamental myth about “ownership of the means of production”, Marxism.*

INTRODUCTION

Corporations are today the centre of much critical analysis of the economic system that creates and perpetuates obscene inequalities in income and wealth. In the Antebellum American South, a similar inequality existed in wealth and real income between masters and slaves. Was the root of this problem the legal form of the slave plantations or the master–slave relationship itself? Would a different legal form for plantations, leaving the master–slave relationship intact, have solved the problem? We face a similar quandary today. A large part of the social criticism focuses on the corporation’s legal form rather than the master–servant or employer–employee relationship. The analysis presented in this article questions the idea that the legal form of the corporation is really the root of the problem, and instead claims the core problem is the employment relationship. To address these questions, our entry point is the whole debate about corporate governance to argue that the problem is not the corporation *per se*.¹

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¹ For the current state of the debate on corporation governance, see Clarke and Branson (2012) or Gordon and Ringe (2018).

CITIZENS UNITED AND CORPORATE PERSONHOOD

In the American context, a good place to start is the debate on whether the Citizens United Supreme Court decision, supposedly based on the idea that a corporation is a legal person and thus should hold free speech rights just like natural persons.

The first point to make is that corporate personhood was not the basis for the decision. In fact, the decision relied on the idea that members (shareholders) of the corporation are (in)directly natural persons such that corporate political speech may then be construed as the associational speech of those natural persons, similar to the political speech of trade unions or NGOs is the associational speech of their members. Even though in the case of large publicly traded corporations, this reasoning might be factually absurd, it was nevertheless the reasoning used, not the rights that corporations hold as ‘persons’. Indeed, Justice Stevens’ dissent referred to the fancifulness of seeing corporations’ political actions as the voice of the natural person shareholders.

It is an interesting question ‘who’ is even speaking when a business corporation places an advertisement that endorses or attacks a particular candidate. Presumably it is not the customers or employees, who typically have no say in such matters. It cannot realistically be said to be the shareholders, who tend to be far removed from the day-to-day decisions of the firm and whose political preferences may be opaque to management. Perhaps the officers or directors of the corporation have the best claim to be the ones speaking, except their fiduciary duties generally prohibit them from using corporate funds for personal ends. Some individuals associated with the corporation must make the decision to place the ad, but the idea that these individuals are thereby fostering their self-expression or cultivating their critical faculties is fanciful. It is entirely possible that the corporation’s electoral message will conflict with their personal convictions. Take away the ability to use general treasury funds for some of those ads, and no one’s autonomy, dignity, or political equality has been impinged upon in the least. (Stevens 2010)

One can these days even find calls to abolish corporate personhood (Edwards and Morgan 2004; Ripken 2012 and 2019; Tombs and Whyte 2015). Yet, for several reasons, that would be a cure worse than the disease itself. Other forms of business ownership could just as well lead to political influence being purchased as long as money is allowed to play its current role in the political process regardless of where it comes from.² Moreover, whole use of the word “person” is not necessary to describe the characteristic features of a corporation; namely, it is a *legal party* that is separate from the shareholders. A corporation’s assets and liabilities are not the personal assets or liabilities of the shareholders. While it is said

² See the work of Lawrence Lessig (2011; 2019) for alternatives.

that shareholders have “limited liability” for corporate debts, this is misleading. Shareholders have *no* personal liability for such debts (albeit their shares may lose value) and the corporation is fully liable for its debts.

According to the original conception of a corporation, which goes back to Roman and medieval law, such a legal form permits a group of people to undertake the risks of a joint enterprise while keeping those corporate risks from reaching their personal assets. If the corporate form were to be abolished, then only wealthy people would be able to undertake the risks of sizable business enterprises, in turn condemning the rest of the population to merely being hired hands (for more, see below).

Similarly, it is hard to imagine any change more politically favourable to the rich 1% than restricting the exercise of political voice to natural persons. Such a change would rule out associational speech by trade unions, NGOs, and other civic associations, none of which are natural persons. John Q. Public and Charles Koch in that scenario would each have the right to as much of a political voice as they could individually afford.

STAKEHOLDERS' RIGHTFUL CLAIMS

An old maxim in Roman law states: “What touches all is to be approved by all” (Tierney 1982, 21). Today, this idea is often formulated as the “Principle of Affected Interests... Everyone who is affected by the decisions of a government should have the right to participate in that government” (Dahl 1970, 64). This principle is often used to support a stakeholder theory of corporate governance according to which stakeholders are the customers, workers, suppliers as well as any affected local residents (Robé 2011; Harrison et al. 2019). A valid component of this principle is that people should have the right and the means to protect their legitimate interests. Nevertheless, typical use of the principle suffers from the sin of omission: the failure to differentiate two very distinct ways to protect one’s affected interests.

(1) The *negative or decision-constraining control right* is the right to restrain the decision of another party that will affect one’s interests. In a market economy, this usually takes the form of the decision not to buy a product or not to supply a service. Conventional economics criticises a monopoly seller or a monopsony buyer as leading to inefficiency, yet another problem is that it effectively neutralises the buyer’s or seller’s negative control rights. Further, negative externalities (e.g., pollution) also adversely affect one’s interests beyond a market relationship and thus there must be a more effective means to protect these interests apart from individuals trying to bargain with corporations.

(2) The *positive or decision-making control right* is the right to participate in the decision of another party to protect one’s interests. This is the form of the Affected Interests Principle usually evoked to argue for all stakeholders (i.e., all whose interests are affected) to somehow participate in a corporation’s decision-making. Application of the principle is plagued by both practical and theoretical difficulties.

The problem in practice is the lack of any plausible form of representing all whose interests are affected. For instance, when a mobile phone manufacturer makes design or pricing changes this affects all users around the world who use these phones, yet there hardly seems to be any way for consumers to elect representatives to 'protect their interests'. Their best protection is afforded by competition in the marketplace, i.e., by their negative control rights. The representational notion of stakeholder control is hence often set aside in favour of a fiduciary notion. Still, this notion suffers from a similar problem of the accountability of the fiduciaries to their beneficiaries and the legitimacy of those beneficiaries holding positive decision-making rights in the first place.

Despite the affected interests principle being validly applied to the exercise of stakeholders' negative or decision-constraining control rights, in itself this entails no claim that stakeholders should somehow 'participate' in the other party's exercise of their positive or decision-making rights. The typical problem is that stakeholders may have little power or opportunity to exercise non-trivial negative control rights vis-à-vis large corporations due to corporations' capture of the state and the state's power to regulate. The conclusion is that such state capture should be abolished; it is not that private corporate overlords (managers and their corporate boards) should be empowered to serve some undefined 'social' interests without any means of true accountability or grounds for legitimacy.

The fundamental flaw in stakeholder theory or the affected interests principle is that it considers certain hypothetical positive control rights as the solution to the very real problem of negative control rights that are *ineffective* due to monopoly/monopsony power, negative externalities, a lack of information about corporate plans, and government regulations that are inadequate or poorly enforced because of state capture. Rather than reformers receiving a warm buzz by asserting ineffective claims to assert positive stakeholder governance rights, energy should be redirected to stronger anti-trust, environmental, and corporate transparency regulations.

WHAT ABOUT SHAREHOLDERS' DEMOCRACY?

Are shareholders like citizens in a democracy? The legal theory underlying the conventional corporation of today is that members³ of the corporation are the common shareholders – and those membership rights are ordinary property rights (more on this below) and thus the shareholders are also called "owners" of the corporation.⁴ Some legal commentators have argued that shareholders are not the 'owners' of a corporation *because* they do not own the assets of

³ "In general, the shareholders are the members of the company and the terms 'shareholders' and 'members' may be used interchangeably" (Hannigan 2012, 304).

⁴ See Chassagnon and Hollandts (2014) for a review of the literature on who 'owns the corporation', although the debate is somewhat linguistically ill-posed since it is the membership rights that are owned as property rights by the shareholders. Whether or not one interprets that as ownership of 'the corporation' is largely a linguistic and ideological interest.

the corporation as their personal assets (Robé 2011; Stout 2012). However, this seems a perfect *non sequitur* as it seems no one has claimed that shareholders are owners *because* they somehow personally own the corporate assets. Moreover, shareholders, again in theory, elect the corporate board and corporations are routinely bought and sold with the agreement of the shareholders, e.g., in daily transactions of private equity. Therefore, the argument that shareholders are not, in theory, owners of the corporation at best seems to be a suggestion to use some other linguistic euphemism for the legal role of shareholders.

For most of the 20th century, notably after Adolf Berle and Gardiner Means' classic book *The Modern Corporation and Private Property* (1932), it was well known that the actual control of a publicly traded corporation (by managers and the board) is separate from the corporation's ownership (by far-flung shareholders). Yet, since in theory member-shareholders elect the board, the board members and thus the managers were seen as agents of the shareholders as the principals in an agent–principal relationship. Nonetheless, given that it is so factually farcical to picture the far-flung shareholders as 'principals' supervising their 'agents', a few modern legal theorists, e.g., in the standard corporate law 'hornbook' by Harvard's Robert C. Clark (1986), have suggested that the theoretical agency relationship should be watered down to a fiduciary one. While that may sound a little more realistic, it is quite an odd 'fiduciary' relationship in which the 'beneficiaries' legally elect the 'fiduciaries' and can legally sell the entire organisation.

Even more far-fetched are the calls to undo the 'separation of ownership and control' by establishing shareholder democracy. In publicly traded companies, there is a huge collective action problem for any shareholders to privately shoulder the costs to obtain enough other shareholders to vote to defeat the management-supported slate of board candidates. Hence, in Albert Hirschman's terms, the realistic response of dissatisfied shareholders is to exercise their negative control rights to exit – even called the "Wall Street Rule" (Sell your shares) – rather than try to exercise their voice (their positive control rights as members of the corporation).

Still, these pragmatic problems pale next to the deeper problem with the whole concept of shareholders' democracy. In the course of a corporation's business activities, the management does not exercise managerial authority over the shareholders (qua shareholders), only over the (indirect) property of the shareholders, and democracy is a system for governing people, not governing property. The only people over whom management exercises authority (within the scope of business activities) are the corporation's employees.

The analogy between state and corporation has been congenial to American lawmakers, legislative and judicial. The shareholders were the electorate, the directors the legislature, enacting general policies and committing them to the officers for execution. ... Shareholder democracy, so-called, is misconceived

because the shareholders are not the governed of the corporation whose consent must be sought. (Chayes 1966, 39–40)

The “shareholder democracy” concept is analogous to the people of Russia going through the motions of running ‘democratic’ elections for the government of Ukraine.

Some legal theorists still object to restricting the ‘democratic’ franchise to “the governed”:

Yet in fact there is democracy in the typical investor-owned firm; it is just that the investors of capital do the voting rather than the workers. Converting to worker ownership means not only enfranchising the workers but also disenfranchising the firm’s investors while continuing to deny the franchise to the firm’s consumers. (Hansmann 1996, 43)

In a similar vein, one might say that the American Revolution enfranchised the Americans (or at least white male property owners) but also disenfranchised the English while continuing to deny the franchise to the French to elect a government of the Americans.

We have seen that the stakeholder notion of affected interests as well as the call for ‘shareholder democracy’ fail to address the theoretical and practical questions of:

1. who should legitimately control corporate management; and
2. who can do so effectively?

The democratic answer to the first question is: “the people who are managed by the corporate management”, and the answer to the second question is: “The only cohesive, workable, and effective constituency within view is the corporation’s work force” (Flynn 1973, 106). In spite of Robert Dahl’s mention of the affected interests principle (1970), when it came to later specifying ‘the alternative’ he made no use of that principle or the stakeholders theory. Instead, he advocated “a system of economic enterprises collectively owned and democratically governed by all the people who work in them”⁵ (Dahl 1985, 91).

Yet, these answers seem beyond the reach of almost all ‘responsible’ legal, economic, and political thinkers, and thus the kabuki theatre of the ‘corporate governance debate’ will continue.

⁵ The footnote reads: “In clarifying my ideas on this question I have profited greatly from a number of unpublished papers by David Ellerman, cited in the bibliography, as well as numerous discussions with and papers by students in my graduate seminar on The Government of Economic Enterprises and my undergraduate seminar on Democracy at Work”.

WHAT ABOUT COOPERATIVE CORPORATIONS?

The original concept of a corporation (in its Roman and medieval roots) was a group of natural persons engaged in certain joint activities “that possessed a juridical personality distinct from that of its particular members” (Tierney 1982, 19). However, the original idea of these joint corporate activities *carried out by the members* was completely corrupted by having these activities actually carried out by employees of the corporation – a change that fully developed when wage labour became the dominant form of work in the Industrial Revolution.

Many see the *cooperative* corporation as a revitalisation of the idea of people joining together to perform certain cooperative activities and to democratically govern those joint activities.

A co-operative is an autonomous association of persons united voluntarily to meet their common economic, social, and cultural needs and aspirations through a jointly-owned and democratically-controlled enterprise.

(International Cooperative Alliance 2015, ii)

This noble idea was nevertheless soon also undercut by the similar use of employees to perform actual cooperative activities – except for worker cooperatives where the work is carried out by the members.

Consider a consumer cooperative. What is the cooperative activity performed by its members? It is not consumption; that would be a commune or a kibbutz. The activity engaged in by the consumer-members is shopping done on an individual or family basis in the cooperative, which is a distribution business for food and other consumer goods. Still, those business activities are carried by employees of the consumer cooperative – aside from the vestigial ‘work requirement’ for members such as handing out cheese samples to customers for a few hours each month.⁶ For instance, in an upscale consumer cooperative many members were scandalised when it was discovered that some members were having their work requirement performed by their nannies or servants – seemingly without any recognition that all members have the same relationship to the cooperative’s employees.

Corruption of the cooperative ideal is even more pronounced in agricultural marketing and processing cooperatives (e.g., Land O’Lakes or Ocean Spray), sometimes known as “producer cooperatives”, where members are supposed to be the farmers selling their raw products through the cooperative. The problem is not simply that the ‘farmers’ may be agribusinesses running on hired labour but that the ‘cooperative’ activities in the cooperative corporations’ huge processing facilities are all performed by employees.

⁶ Most consumer co-ops do not have a work requirement and are thus perfectly mirrored by non-cooperative supermarkets which give ‘members’ a discount secured by showing a bar-coded ‘rewards card’ at checkout.

It is only in worker cooperatives that the actual activities of the corporation are performed by the members and the people being governed by the management are the same members of the company.

PERSONAL RIGHTS AND PROPERTY RIGHTS

To understand the difference between membership in a cooperative and ownership in a conventional corporation, one must appreciate the difference between personal rights and property rights. People generally hold both types of rights. For instance, a citizen's voting rights in a municipality are based on having the functional role of residing in the city, but those rights may not be bought or sold and are hence personal rights, not property rights. In a cooperative corporation, membership rights are based on the functional role of 'patronage' in the cooperative (e.g., working in a worker cooperative or shopping in a consumer cooperative). When membership rights are intended to be based on holding a certain functional or patronage role, it makes no sense to treat them as alienable property rights. A 'buyer' may not have a functional role, and if that person has a functional role there would be no need to 'buy' the rights.

It is easy to distinguish personal rights from property rights in terms of inheritability (or 'bequeathability'). When a person dies, personal rights like one's vote in municipal elections are extinguished whereas property rights like the votes attached to one's corporate shares are passed on to one's estate and heirs. If membership rights, like in a conventional corporation, may be inherited or generally may be bought and sold they are property rights and the members are then usually referred to as "owners".

WHAT ARE THE RIGHTS OF CAPITAL?

The Fundamental Myth

Misconceptions when it comes to corporations are typically accompanied by a far more basic falsehood that is a fundamental misunderstanding of the rights held by capital in the current economic system.

The *fundamental myth* is that the discretionary decision-making control rights over the productive process and the rights to the product of that process are legally part and parcel of the ownership of the capital assets employed in the process, i.e., the "ownership of the means of production".⁷ The point is not that capital should not have those rights but that capital in fact does not possess such legal rights in the present legal system.

During the last century, a 'Great Debate' raged between (so-called) Capitalism and Socialism/Communism concerning:

⁷ I am using "capital" in the older sense of capital assets used in production, i.e., the 'means of production', not in the sense of wealth in general like in the works of Thomas Piketty (2014 and 2020).

the classical distinction between firms with privately-owned production means and firms with publicly-owned production means. In this case one will have capitalism on the one hand and two or more forms of socialism on the other.... (Jossa and Cuomo 1997, 113)

In any case, the whole debate was ill-posed from the outset since (like the very name “capitalism”) it was based on a misconception about the rights of capital. It is often said that Marx did not provide details of his vision of socialism or communism. Yet, if one spends one’s adult life condemning Y (e.g., *private* ownership of the means of production), it is clear that one’s image of a better society will not include Y. The alternative of socialism or communism in the Marxist tradition accordingly *had* to have social, public or state ownership of the means of production along with the public employment relation – as indeed was the case in every Marxist country (with the possible exception of Yugoslavia).

Marx also popularised the capital-based phraseology of “capitalist” and “capitalism”. To understand Marx’s (mis-)conception of the ‘rights of capital’ embodied in the ‘ownership of the means of production’, one must go back to the medieval notion of dominion based on the ownership of land. What today we might call the “landlord” was then the Lord of the land exercising both political/juridical control over the people living on the land and rights to the fruits of their labour. As the legal historian Frederic Maitland (1850–1906) put it: “ownership blends with lordship, rulership, sovereignty in the vague medieval *dominium*...” (Maitland 1960, 174). Or as the German legal scholar, Otto von Gierke (1841–1921) simply stated: “Rulership and Ownership were blent” (Gierke 1958, 88).

It is this medieval notion of dominion associated with land ownership or ‘landism’ that Marx carried over to the ownership of capital in his conception of ‘capitalism’.

It is not because he is a leader of industry that a man is a capitalist; on the contrary, he is a leader of industry because he is a capitalist. The leadership of industry is an attribute of capital, just as in feudal times the functions of general and judge were attributes of landed property. (Marx 1977, 450–51)

Marx’s blunder has been a staple of socialist thought ever since, as noted by Bo Rothstein.

It is astonishing that a hundred years of socialist thought have not confronted the basic capitalist idea – that owners of capital have the right of command in the relations of production. The idea behind nationalization, wage earner funds, and the like is in fact fundamentally the same idea as that on which capitalism is based, namely, that ownership of capital should give owners the right to command in the production process (be they democratically elected

politicians, state bureaucrats/ planners, workers' representatives, or union officials). Indeed, this is a nice example of what Antonio Gramsci called bourgeois ideological hegemony. (Rothstein 1992, 118)

The defenders of 'capitalism' are more than happy to accept this view that the management rights ('leadership of industry') and the rights to the product are all 'an attribute of capital', of 'ownership of the means of production'. Any change in the employer's role can then be pitched as a violation of 'property rights'.

What is Wrong with the 'Fundamental Myth'?

The myth is *simply* incorrect; capital has no such rights in the 'capitalist system'. Notwithstanding Marx's imprimatur and the constant ideological assertion of the 'rights of capital', it only takes an understanding of the *renting out of capital* to see the fallacy.

Suppose capital assets are *rented out* to another legal party who buys, hires or already owns the other inputs and undertakes a productive process. Then, that legal party, by virtue of being the hiring party (not the owner of the capital assets), exercises the discretionary management rights within the limits of the input contracts (i.e., management rights) over that process and has ownership of whatever product emerges.

Capital is in fact routinely rented out. In addition to banks and other financial firms in the business of lending financial capital, real estate companies, equipment rental companies, and computer hardware companies are also in the business of hiring, renting or leasing physical capital assets out.

Let us consider some simple examples. When an individual owns, say, a widget-making machine, it is easy to understand that the machine could be rented out. However, if the individual forms a corporation and puts in the machine and other capital as initial capital, many people then think that the individual's ownership of the corporation somehow makes a fundamental difference in the logic of rentability as if the machine can no longer be rented out. Yet, of course, the machine can still be rented out, in which case the owner of the corporation does not have management or product rights in the going-concern operation using that machine. The process of incorporation does not miraculously transubstantiate the ownership of a capital asset into the ownership of the net results produced using the capital asset in a going concern.

The identity of the legal party holding those management and product rights in a going concern is legally determined by the pattern of market contracts, i.e., by who hires or rents what or whom, not by the prior ownership of capital.

This contract theory of the power over the corporation fundamentally changes the parameters for establishing economic democracy. Not realizing the

importance of this logic has probably been the second most important mistake by the socialist and Marxist left over the last hundred years.

(Rothstein 2020, 10)⁸

This is a conceptual point about the structure of property rights in the current system and is not about the bargaining power (typically in the hands of capital owners) or transaction costs involved in renting capital out of a corporation or renting people into a corporation.⁹

The ownership of capital gives the owner negative control rights over the use of the capital, as in: “No, you may not use this machine, building, or land”. This right is sufficient to turn those who nevertheless use the machine, building or land into trespassers – but it does not automatically turn them into employees.

Central to ownership is the right to exclude others from contact with an item. Ownership thus gives the owner of an item the right to control the uses to which others put it in the sense that he may veto any use of it proposed by someone else. But it does not give him any right to tell anyone to put that property to the use that he wants. It is not a right to command labor. (McMahon 1994, 16)

The positive discretionary control or management rights over employees legally arise from the employer–employee contract, not ownership of the capital that the employees are using.

The Briggs Manufacturing Example

It is the pattern of contracts (who hires what or whom) that determines who owns the product made using some of the corporation’s assets (which could be leased out). On top of the fundamental myth being involved in the common misunderstanding of the ‘ownership of a corporation’, it is expressed in the usual notion of ‘owning a factory’. Still, the simple logic of the rentability of capital does not stop at the ownership of a whole factory.

In the early 1950s, automobile manufacturer Studebaker-Packard Corporation had the Packard bodies produced in the Detroit Conner Avenue plant of the Briggs Manufacturing Company. After the Briggs founder died, all 12 of the US Briggs plants were sold to the Chrysler Corporation in 1953. “The Conner Ave.

⁸ Rothstein considers the foremost mistake to be “that the industrial working class would be the engine behind a new (socialist) mode of production” (ibid., 10).

⁹ The author has been making this distinction between the corporation and the contractually-defined firm-as-a-going-concern for almost half a century (Ellerman 1975). A French legal scholar, Jean-Philippe Robé, has independently made essentially the same distinction between the corporation and “the firm – the organization built via contracts transferring control over resources to the corporations used to legally structure the firm” (Robé 2011, 4). For instance, paying attention to this corporation/firm distinction in the previous quote from Rothstein, it would read the “*contract theory of the power over the [firm]*” (Rothstein 2020, 10).

plant that had been building all of Packard's bodies was leased to Packard to avoid any conflict of interest" (Theobald 2004).

This example illustrates the vacuity of the common idea that 'being the firm' is determined by 'ownership of the corporation'. Where was the 'ownership of the corporation' that included who owned the car bodies coming off the assembly line or the management rights over that production process? Of course, the shareholders of Studebaker-Packard owned that company and similarly for the shareholders of Chrysler, yet that did not answer the question of 'who is the firm' in that going-concern operation in the Conner Avenue plant. That was determined by the pattern of new market contracts – by who hires, rents, or leases what or whom. Studebaker-Packard leased the factory from Chrysler. The Studebaker-Packard Corporation would then hold the management rights over the hired workers and product rights for the operations of the factory owned by the Chrysler Corporation.

In spite of the logical argument and real-life examples, most economists and legal theorists (not to mention the Marxist faithful) seem unwilling to draw out the implications of capital being rentable. Of course, conventional economists and legal thinkers *can* understand that capital is able to be rented out, but they find no convenience in teasing out the consequences. Out of learned ignorance or intellectual lassitude, they assume the fundamental myth that serves as *pons asinorum* in understanding of the 'rights of capital'. For them, it is a bridge too far.

Sorry Karl, Even the Name "Capitalism" is a Misnomer!

In the Middle Ages, there was little or no developed market for renting out land. This led those governance and product rights to be rolled into the medieval notion of land ownership as dominion. Still, capital assets, including land, are *routinely* rented out in the 'capitalist' system. Given the central role of the Marxist notion of 'ownership of the means of production', it may be understandable why Marxists cling on to the fundamental myth and the 'capitalist' phraseology as a matter of quasi-religious dogma.¹⁰ Many defenders of the 'capitalist' system seem equally dogmatic in failing to think through the consequences of capital being rentable in a private property market economy.

There was, however, one economist who stood out as the most philosophically and economically sophisticated defender of the 'capitalist' system, which he did not refer to by that name. This was Frank Knight (1885–1972), one of the founders of the Chicago School of Economics. Knight was perfectly clear that

¹⁰ The point here is that Marx was wrong to adopt the fundamental myth that the product and management rights are part of the ownership of the means of production – "the second most important mistake by the socialist and Marxist left over the last hundred years" (Rothstein 2020, 10). Instead of understanding the point, many will just think of other reasons to use the name "capitalism", e.g., to refer to the high-school level banality that organised capital has overwhelming bargaining power over unorganised workers.

“capitalism” is a misnomer and concerning Marx’s role in propagating that myth about capital ownership.

Karl Marx, who in so many respects is more classical than the classicals themselves, had abundant historical justification for calling, i.e., miscalling – the modern economic order “capitalism.” Ricardo and his followers certainly thought of the system as centering around the employment and control of labor by the capitalist. In theory, this is of course diametrically wrong. The entrepreneur employs and directs both labor and capital (the latter including land), and laborer and capitalist play the same passive role, over against the active one of the entrepreneur. It is true that entrepreneurship is not completely separable from the function of the capitalist, but neither is it completely separable from that of labor. The superficial observer is typically confused by the ambiguity of the concept of ownership.

(Knight 1956, 68, fn. 40)

The system today is not characterised by capital being unrentable, but by *both* persons and capital goods being legally rentable.

Since slavery was abolished, human earning power is forbidden by law to be capitalized. A man is not even free to sell himself; he must rent himself at a wage. (Samuelson 1976, 52 [italics in the original])

Similar remarks are made by other economists.

The commodity that is traded in the labor market is labor services, or hours of labor. The corresponding price is the wage per hour. We can think of the wage per hour as the price at which the firm rents the services of a worker, or the rental rate for labor. We do not have asset prices in the labor market because workers cannot be bought or sold in modern societies; they can only be rented. (In a society with slavery, the asset price would be the price of a slave.) (Fischer et al. 1988, 323)

A better name for the current system is a *human rental system* (Ellerman 1992, 2015, 2021) that differs importantly from the previous system in which workers were owned rather than rented. Moreover, the human rental relationship is voluntary in the usual juridical (and un-‘theorised’) sense of the word.¹¹

¹¹ We are not indulging in the usual left-wing parlour game of escalating one’s theorised notion of ‘voluntariness’ so as to exclude the employment contract – and thus stay within the conventional classical liberal criterion of voluntariness as being a necessary and sufficient condition for accepting a legal contract – instead of developing the notion of inalienable rights that descends from the Reformation idea of the ‘inalienability of conscience’ in the Abolitionist and Democratic movements.

It is a shame that so many economists and conventional classical liberals think that since they and Marxists all agree on the 'rights of capital' that it must be a valid characterisation of the misnamed 'capitalist' system. Frank Knight possessed the intellectual clarity to draw out the consequences of capital being rentable for the "superficial observer" who cannot move beyond easily refuted banalities to do with the 'rights of capital'. Capital is rentable in any private property market economy and "in a free society the larger part of the productive capacity employed (as matters stand today in a typical Western nation) consists of the services of human beings themselves, who are not bought and sold but only, as it were, leased" (Knight 1936, 438). And it is that hiring, renting or leasing of persons that is the characteristic feature of the present system.

CONCLUSIONS

The aim of this article was to analyse a miscellany of misconceptions about corporations and the rights of capital. Yet, the corporate form itself, at least in its original conception, is not the problem. Blaming 'corporations' for the ills of the current system of renting human beings is like blaming glass bottles for alcoholism.

An important idea to preserve is the original and ancient idea of a corporation as a group of natural persons engaged in certain joint activities "that possessed a juridical personality distinct from that of its particular members" (Tierney 1982, 19). This original conception of the corporation is well described in Davis (1961), Raymond (1966), and in Abram Chayes' *Introduction* in the book by Davis.

We can here perhaps note a final irony, at least. The concept of the corporation began for us with groups of men related to each other by the place they lived in and the things they did. The monastery, the town, the gild, the university, all described by Davis, were only peripherally concerned with what its members owned in common as members. The subsequent history of the corporate concept can be seen as a process by which it became progressively more formal and abstract. In particular the associative elements were refined out of it. In law it became a rubric for expressing a complicated network of relations of people to things rather than among persons. The aggregated material resources rather than the grouping of persons became the feature of the corporation. (Chayes 1961, xix)

The point that is hardly, if at all, mentioned in the corporate law literature is that the original associative activity of the members was squeezed out since it was replaced by the joint activity of the employees (including the managers) of the corporation. Conceptually speaking, the modern *absentee-owned* corporation is a 'wholly-owned subsidiary' of the human rental relationship: the employment contract.

The key problem lies *not* in the original idea of a corporation but in the legal institution that has completely corrupted and undermined this conception – namely, the employment relationship, the renting of human beings.

Thus, the original notion of the corporate embodiment for people engaged in a joint human activity was turned into a piece of property like a piece of real estate or “a large, composite machine” to be bought and sold in the marketplace. When an occupant of the White House in America suggested purchasing Greenland, leading thinkers in political science, economics and law along with various pundits and thought-leaders ridiculed the suggestion and did not accept the justification that “it’s just a real estate deal”. Yet, the same thinkers find no problem in the daily purchase and sale of corporations (whose workforce is many times the population of Greenland); after all, it is supposedly just the purchase and sale of ‘aggregated material resources’ – since “the associative elements were refined out of [the modern corporations].”

An interesting aspect of the whole corporate governance debate is how so many legal, political and economic thinkers have completely lost sight of the concept of democracy in the organisations where people spend most of their waking hours. The human rental relationship and subsequent debasing of membership into ownership seems to have eclipsed the democratic ideal among so many learned thinkers today who would otherwise pledge their undying allegiance to democratic self-governance in the public sphere. The feminist movement has learned well that “It’s private” is no justification for denying women basic human rights ‘within the household’. Still, many people (including many feminists) seem to take “It’s private” as a sufficient reason to deny the basic human rights of self-governance within the firm. It is only as a result of this professionally prudent forgetting of democratic ideals in the workplace that the whole question of corporate governance and purpose is ‘up for grabs’ in the first place. There is no analogous debate concerning who should govern a municipality.

Today, more worker ownership would certainly help improve the distribution of income (Rieger 2016). However, the root problem is systemic. We now have the institution for the voluntary renting of other human beings – and that in turn has allowed the complete corruption and debasement of the original idea of the corporate embodiment for people performing certain joint activities. The human rental relationship allows absentee owners of corporations to legally appropriate all of the assets and liabilities created as the fruits of the labour of the people who work in the corporation – with those people’s labour being merely treated as an expense item. This is the hub of the problem, and that statement should be as obvious as saying that at its core the problem of inequality in the Antebellum American South was the master–slave relationship.

The idea of a corporation is not the root of the present inequality problem – anymore than the legal form of cotton farms (as slave plantations) was in Antebellum times. The essential problem today is the employer–employee (or master–servant) institution for the employing, hiring, leasing or renting of human

beings. Hence the rise of neo-abolitionist calls (Ellerman 2021) to do away with that human rental institution in favour of all corporations being democratic associations of the people who carry out the corporations' activities.

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SO PROBLEM RES KORPORACIJE?

Povzetek. So korporacije res problem? Ali lahko reforme na področju korporativne odgovornosti (npr. več ukvarjanja z deležniki) pripeljejo do resničnih sprememb? Cilj tega prispevka je analizirati razprave v zvezi s primerom *Citizens United*, obravnavo korporacij kot pravnih oseb, teorijo deležnikov, načelo prizadetih interesov in nazadnje globlje zmote v zvezi s pravicami kapitala, zakoreninjene v marksizmu in konvencionalnih ekonomskih teorijah kapitala in korporativnega financiranja. Zadnja analiza obravnava še eno institucijo, ki leži v temelju težav trenutnega gospodarskega sistema, in sicer najemanje ljudi v okviru delovnega razmerja – kar je prav tako pokvarilo prvotno idejo korporacije, ki sega v čas srednjega veka.

Ključne besede: obravnavo korporacij kot pravnih oseb, zaposlovanje oz. najemanje ljudi v okviru delovnega razmerja, temeljni mit o "lastništvu proizvodnih sredstev", marksizem.

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RAZUMEVANJE MOŠKOSTI MED SREDNJEŠOLSKO MLADINO V SLOVENIJI**

Povzetek. Temi moških in moškosti je v svetu posvečeno veliko raziskovalne pozornosti, v slovenskem akademskem prostoru pa obstaja vrzel v raziskovanju in splošnem diskurzu. Na podlagi izvedbe pilotne študije, ki neposredno meri percepcije slovenskih srednješolcev in srednješolk o moškostih, smo ugotovili, da zaznave mladih močno temeljijo na vzorcih zahodne hegemonске moškosti, pri katerih je v ospredje postavljena podoba močnega, tekmovalnega, neustrašnega moškega, ki mora finančno poskrbeti za svojo družino, ne sme izkazovati čustev ali poiskati pomoči, od katerega se pričakuje pogosto menjavanje spolnih partneric in tudi nasilno reševanje problemov. Pilotna raziskava prinaša pomembne izsledke za področje moškosti v Sloveniji in je odlično izhodišče za nadaljnje raziskovanje te teme.

Ključni pojmi: spol, moškost, moškosti, mladi, stereotipi.

UVOD

Tema moškosti je v mednarodnem znanstvenem prostoru že zelo dobro raziskana, kar je prispevalo k pomembnim ugotovitvam na področju študij spolov. V Sloveniji je deležna razmeroma malo pozornosti, predvsem posredno v okviru 1) raziskovanja spolno pogojenih vlog v zasebni in javni sferi ter podrejenega položaja žensk in ženskih/feminiziranih vlog/del (Jogan, Hrženjak, Renner, Kanjuo Mrčela, Antić Gaber, Mikić idr.); 2) drugih raziskav, povezanih s spolom v okviru lezbičnih in gejevskih študij (Perger, Kuhar idr.); in bolj neposredno 3) v

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raziskavah, ki obravnavajo vloge moških v zasebni sferi, npr. kot očetov (Hrženjak, Šori, Humer, Frelih idr.).

Članek ima dva cilja, ki temeljita na ugotovljenih vrzelih v raziskavah in vedenju. Prvič, spodbuditi želimo razpravo o moškosti, ki v Sloveniji še ni v središču raziskovanja študij spolov; drugič, tematizirati in raziskati želimo stališča srednješolcev in srednješolk v Sloveniji do moškosti ter njihova mnenja o praksah moškosti. Zato je naše glavno raziskovalno vprašanje, kako srednješolska mladina v Sloveniji dojema moškost(i)?

V prvem delu članka predstavljamo pregled ključnih konceptov, ki jih je razvila Raewyn W. Connell ([2000]2005) ter so odločilno vplivali na področje in raziskave moškosti. Na tej podlagi predstavljamo nekatere novejšje poskuse redefinicije moškosti in nekoliko nasprotujoče si poglede na politike sprememb. Na koncu predstavljamo rezultate pilotne študije, ki ena prvih v Sloveniji neposredno proučuje različne vidike moškosti in odnos mladih do nje. Njen prispevek k boljšemu razumevanju položaja moških in moškosti v družbi bo dobro izhodišče za nadaljnje, obsežnejše raziskave, ki jih nameravamo izvesti na to temo.

TEORETIČNE KONCEPTUALIZACIJE MOŠKOSTI

Zgodovinsko gledano so raziskave o spolu posvečale veliko več pozornosti proučevanju žensk (in vprašanjem, povezanim z ženskostjo) kot moških (vprašanjem, povezanim z moškostjo; Wharton 2012, 20). To raziskovanje dobro dokumentira šibkejši in podrejeni položaj žensk v družbi, ki ga je večina raziskovalk in raziskovalcev spola zaznala kot ponavljajoči se (zgodovinski) vzorec pri opazovanju različnih režimov moči (Mikić 2020). Moški so bili v raziskovanju dolgo obravnavani kot neospoljeni, saj je bil koncept spola in odnosov med spoloma razumljen predvsem kot stvar žensk in za ženske (Hearn in Howson 2019). Javne in zasebne vloge ter prakse so veljale za spolno nevtralne, to »navidezno spolno nevtralnost kategorije moških in moškosti« pa je mogoče razumeti kot »specifično obliko ospoljene moči« in način spolne dominacije, ki vzpostavlja moškost kot normalnost in univerzalno normo, s katero se merijo »drugi« spoli (Hrženjak 2017, 9).

Zanimanje za vprašanja, povezana s konceptom moškega in moškosti, je v zadnjih desetletjih postalo zelo aktualno in je pomembno prispevalo k razumevanju razmerja moči med spoloma (in spoli) v družbi. Na to so močno vplivali feminizem, zlasti drugi feministični val, ki je temeljil na preizpraševanju vseh predpostavk družbenih in političnih razmerij, ki so posredovane s spolom ter gibanj za osvoboditev gejev in moških. Elliott (2016) poudarja, da je bila v zgodovini proučevanja moških predvsem pomembna razprava v devetdesetih letih prejšnjega stoletja o tem, ali so moški lahko feministi.

Kritične študije moških in moškosti (KŠMM) so se kot področje sociološkega raziskovanja pojavile v osemdesetih in devetdesetih letih 20. stoletja. Edwards (2006, 2-3) opisuje tri faze njihovega razvoja: prva temelji na paradigmi spolnih vlog iz sedemdesetih let, v kateri so bili moški in moškost razumljeni relativno

statično, kulturno vezano in/ali mikrosociološko; druga se je pojavila v osemdesetih letih, predvsem kot posledica kritike prve, z bolj politično utemeljitvijo, ki je poudarjala razmerja moči; na tretjo pa je jasno vplivala poststrukturalistična teorija, zlasti vprašanja normalnosti, performativnosti in seksualnosti. Hearn in Howson (2019) trdita, da smo zdaj priče četrte fazi KŠMM, ki je več pozornosti namenila mednarodnim, primerjalnim, nadnacionalnim, globalnim, postkolonialnim in transnacionalnim pristopom, materialistično-diskurzivnim, novim materialističnim analizam in pristopom ter bolj radikalnim stališčem o hegemoniji spolov.

Ključne koncepte, ki so bili osrednjega pomena pri institucionalizaciji KŠMM od konca sedemdesetih let prejšnjega stoletja, je razvila Raewyn W. Connell¹ v delih *Gender and Power: Society, the Person and Sexual Politics* (1987), *Masculinities* (1995), *The Men and the Boys* (2000) in *Gender* (2009). V tem poglavju se opiramo na njene konceptualizacije moškosti.

Najpomembnejše izhodišče KŠMM je konceptualizacija moškosti. Connell se v svojih delih (2000, 2005) veliko ukvarja prav s to nalogo. Prepozna in je kritična do treh različnih pristopov k proučevanju moškosti, ki so prevladovali v dvajsetem stoletju: 1) klinično znanje in vodilne ideje Freudove teorije (psihanalitični pristop); 2) socialna psihologija, ki se je osredotočala na priljubljeni koncept o »spolnih vlogah« ter raziskovanje in poudarjanje razlik med moškimi in ženskami, ter 3) razvoj novega pristopa v antropologiji, zgodovini in sociologiji, znan tudi kot socialni konstrukcionizem.

Z opredelitvijo spola kot družbene strukture in družbenega razmerja ponuja kritično feministično analizo moškosti. Connell (2000) trdi, da ne obstaja samo en vseprisoten vzorec moškosti. Norme in pojmovanja moškosti se razlikujejo v različnih družbeno-kulturnih kontekstih (pa tudi znotraj skupin in omrežij) in zgodovinskih obdobjih. Connell (2000) zato poudarja, da je pomembno govoriti o več vrstah moškosti, torej o moškostih, in ne o moškosti kot splošni, enoviti lastnosti moških. Moškost vidi kot prakso izvajanja spola in nujno tudi družbeni konstrukt, strukturo, ki vključuje institucije, ekonomske odnose, spolnost ter odnose med posamezniki in posameznicami. Obstaja tudi v jeziku in drugih simbolnih sistemih. Avtorica poudarja, da je zato ključno utemeljiti analizo moškosti na intersekcijskem (presečnem) pristopu, ki upošteva spol in druga posredovanja razmerij moči. Trdi, da spola in moškosti ni mogoče razumeti in raziskovati ločeno od drugih družbenih struktur, saj so družbene prakse vedno vzpostavljene skozi prizmo spola (tudi rase, etničnosti itd.).

Connell (2005) pri analizi moškosti v zahodni sodobni kulturi opredeljuje štiri dinamične sisteme praks, ki so odgovorni za njihovo strukturiranje: hegemonijo, podrejenost, sodelovanje in marginalizacijo. S tem poudarja, da so

¹ Raewyn W. Connell je najbolj znana kot soustanoviteljica področja študij moškosti in po uvedbi koncepta hegemonске moškosti. Je avtorica številnih del o moškostih, med katerimi sta najbolj znani *Masculinities* ([1995]2005) in *The Men and the Boys* (2000).

različne moškosti med seboj v hierarhičnem razmerju. Dominantni kodeksi v družbi delujejo tako, da nad moškimi izvajajo pritisk in ustvarjajo pričakovanja do njih – to so običajno najbolj čaščene ali zaželene oblike moškosti, ki jih Connell (2000) imenuje hegemonška moškost: »Ni nujno, da je hegemonška oblika najpogostejša oblika moškosti, kaj šele, da je najbolj udobna. Številni moški namreč živijo v določeni napetosti s hegemonško moškostjo svoje kulture ali skupnosti ali v distanci do nje« (Connell 2000, 10–11). Gre za »moškost, ki zaseda hegemonški položaj v določenem vzorcu odnosov med spoloma, položaj, ki je vedno vprašljiv« (Connell 2005, 76). Hegemonija upravičuje podrejanje ene skupine (moških ali oblike moškosti) drugi. Connell (2005) govori o sodelovanju, ko določene skupine moških sodelujejo ali so del hegemonške moškosti (od popolnega sledenja hegemonškemu vzorcu do njegovega delnega prakticiranja), in o marginalizaciji, ko ena vrsta moškosti – običajno hegemonška moškost – odriwa vse druge na rob in nepomembnost. Connell (2000, 102) tudi poudarja, da je hegemonška moškost vedno heteroseksualna, zaradi česar so homoseksualne moškosti avtomatsko podrejene. Mehanizmi hegemonije temeljijo na zatiranju homoseksualnih moških in fantov ter nadzoru heteroseksualnih. Tako obstaja stalna napetost znotraj moškosti in med njimi, ki lahko vodi tudi v nasilje. Ideologija patriarhata legitimira nasilje nad ženskami in podrejenimi oblikami moškosti kot posledico superiornosti hegemonške moškosti. Nasilje² je po Connell (2005) del sistema dominacije, vendar je tudi znak šibkosti sistema (Connell 2000, 13). Globalna širitev kapitalističnih odnosov pomeni tudi globalno širitev zahodnih norm hegemonške moškosti. Pri raziskovanju hegemonške moškosti Connell (2000) priznava, da jih oblikujejo globalne sile (npr. transnacionalni mediji, multinacionalne korporacije, globalni trgi in geopolitični boji), ter uvaža koncept »svetovnega reda spolov«, ki je »celota odnosov, ki na svetovni ravni povezuje spolni režim institucij in spolni red posamezne družbe« (Connell 2000, 41). Obravnava različne oblike moškosti, ki so se pojavile skozi zgodovino, vključno z moškostmi osvajanja in naseljevanja, moškostmi imperija ter moškostmi postkolonializma in neoliberalizma. V sedanjem svetovnem redu opredeljuje kot hegemonško obliko moškosti »transnacionalno poslovno moškost« z značilnostmi, kot so egocentrizem, pogojna zvestoba, nižanje etičnih standardov in skrbi za druge ter osredotočenost na kopičenje in bogatenje.

Ena od pomembnih razprav, ki jih je Connell (2005) prispevala k področju moškosti, je njen pogled na moška telesa in njihovo povezavo z moškostjo, ki temelji na dveh nasprotujočih si koncepcijah, v zadnjih desetletjih prevladujočih

² Connell (2000) ponuja razpravo o povezavi med moškostjo in nasiljem ter o posledicah te povezave za strategije miru. Poudarja dejstvo, da so moški večinoma vključeni v »nasilne« institucije, kot sta vojska in organi pregona, ter da je večja verjetnost, da se bodo moški nasilno vedli tudi v zasebnem življenju. Za razvoj učinkovitih strategij za zmanjšanje nasilja in spodbujanje miru je pomembno razumeti kompleksnost in raznolikost moškosti. Connell (2000) predlaga, da mora strategija za mir vključevati strategijo za spreminjanje moškosti, ter opisuje različna področja za aktiviranje in delovanje. Cilj je demokratično preoblikovanje delovanja spolov, spodbujanje enakosti, nenasilja in medsebojnega spoštovanja med spoloma.

v razpravah o tem vprašanju. Prva je odraz prevladujoče ideologije bioloških znanosti, v kateri je »telo naravni stroj, ki proizvaja razlike med spoloma – z genetskim programiranjem, hormonskimi razlikami ali različno vlogo spolov pri reprodukciji« (Connell 2005, 45). Druga je bila najbolj izrazita v humanističnih in družboslovnih vedah ter spodbuja idejo, da je »telo bolj ali manj nevtralna površina ali pokrajina, na katero je vtisnjena družbena simbolika« (Connell 2005, 46). K temu »staremu sporu 'narava proti vzgoji'« so drugi pristopi predlagali kompromisen pogled, ki združuje biologijo z družbenim vplivom. Connell zavrača vse tri poglede. Biološki pristop in njegova metafora telesa kot stroja se ji zdita napačna in nepodprta z znanstvenimi dokazi, in čeprav se strinja z nekaterimi vidiki družbenega semiotičnega pristopa, opozarja na več težav z njim. Prav tako zavrača tretji pogled, ker po njenem prepričanju med prvima dvema teorijama ni možnosti kompromisa. Avtorica predstavi novo sociologijo telesa (Connell 2000), na katero sta vplivala Foucault in feminizem, ki je »prefinjen opis načina, kako so telesa vpletena v družbene in zgodovinske procese« (Connell 2000, 57), ter v katerem telesa niso »pasivni nosilci kulturnih odtisov« (Connell 2000, 58). Prepričana je, da moškosti nikakor niso programirane v naših genih, temveč se nenehno ustvarjajo, ko se izvajajo v družbeni interakciji v procesih reprodukcije vladajočega načina produkcije družbe. Podobno tudi moška telesa ne določajo vzorcev moškosti (kot trdi biološki esencializem), temveč so »/.../ arene za ustvarjanje spolnih vzorcev« (Connell 2000, 12). Connell (2000) analizira telesne refleksivne prakse v povezavi s štirimi strukturami spolnega reda – strukturami razmerij moči, produkcijskih razmerij, razmerij kateheze in simbolizma. Avtorica trdi, da je reforma tega, kako moški izkazujejo spol, mogoča in nujna za družbeno pravičnost in mir.

Politike sprememb: nove moškosti

Predstavljene konceptualne predpostavke R. W. Connell o moških in moškosti so zlasti v zadnjih letih spodbudile številne strokovnjake in strokovnjakinje z različnih področij k raziskovanju negativnih posledic, ki jih povzroča hegemon-ska moškost, saj moške socializira k izkazovanju moči in prevlade nad drugimi, ter temelji na škodljivih spolnih stereotipih, ki od moških zahtevajo, da so sto-ični, neodvisni, tekmovalni in močni (Courtenay 2000; Pappas 2019). Ta vrsta moškosti, ki jo nekateri imenujejo toksična moškost,³ opisuje družbeno destruktivne vidike hegemon-ske moškosti ali tradicionalnih norm, ki so škodljivi za moške, ženske in družbo (Flood 2019). Izraz poudarja, da patriarhalni družbeni red, ki reproducira moškocentrične norme in prepričanje, da so moški in moško-sti superiorni ženskam in ženskostim (Lindsey 2016; Wharton 2012), ni škodljiv le za ženske, temveč tudi za moške. Ti škodljivi in omejujoči vidiki moškosti se

³ Izraz *toksična moškost* v slovenščini razumemo kot pripisovanje toksičnosti (strupenosti) moških do drugih. V izvorni rabi v anglosaksonski literaturi pa toksična moškost pomeni *škodljiv predvsem sebi*, česar slovenščina asociativno ne sporoča, saj toksičnost razumemo predvsem kot strupen za druge.

imenujejo »cena moškosti« (angl. the cost of masculinity). Patriarhalne kulture namreč prinašajo vrsto obveznosti, s katerimi morajo moški dokazati svojo moškost, in če v obeh oblikah patriarhata (zasebni in javni) ne delujejo ustrezno, jih čakata ponižanje in sramota (Kimmel 2018a). To je še posebej očitno v primeru mladih moških ali fantov (angl. guys),⁴ kot jih imenuje Kimmel v svoji knjigi *Guyland: The Perilous World Where Boys Become Men* (2008). *Guyland* (deželo fantov) opisuje kot stopnjo med deškostjo in moškostjo oziroma vrzel/prostor med odvisnostjo in pomanjkanjem avtonomije na eni strani ter žrtvovanjem in odgovornostjo na drugi. Kimmel (2008, 41) trdi, da je ta vmesna stopnja »najbolj spolno zaznamovana stopnja razvoja osebe« in v ospredje postavlja vprašanje, kaj pomeni biti moški, zlasti v družbi, ki ne predpisuje spolnih vlog tako očitno kot prej. Srednje šole in fakultete so pomemben prostor, kjer fantje lahko ali morajo dokazati svojo moškost. Večina fantovskega vedenja, s katerim želijo dokazati svojo moškost, je razmeroma neškodljiva (npr. pitje, spolnost, videoigre, spletna igre na srečo, televizija, pornografija), vendar pa je lahko podton velikega dela njihovega vedenja problematičen, npr. nasilje v videoigrah, pornografija in pornografske slike po sobah in računalnikih, opijanje vsako noč, homofobija⁵ (»that's so gay«, to je takooo gejevsko, kot podcenjevanje) itd. Kimmel (2008) posebno pozornost namenja iniciaciji kot dogodku, namenjenemu dokazovanju moškosti, ki se dogaja na kolidžih in univerzah po vsej Ameriki, pri čemer ima pretirano pijančevanje pomembno vlogo pri ustvarjanju podobe in prijateljstev fantov, vendar ima lahko tudi nevarne posledice. Drug pomemben vidik so potegavščine, ki običajno vključujejo razne trike in šale, ki so lahko tudi nevarne in celo potencialno smrtonosne.

Z dokazovanjem moškosti (mladi) moški tekmujejo za vire, ki jih imajo kot skupina (vire pridobivajo na račun dominacije nad ženskami), kar Connell imenuje »patriarhalna dividenda«. Čeprav imajo moški na splošno veliko korist od patriarhalne dividende, pa imajo nekatere skupine moških vseeno zelo malo od nje (Connell 2000, 202). Podobno meni Kimmel (2018b), ki trdi, da je patriarhat dvojni sistem moči, v katerem obstaja nesimetrija med družbenim in individualnim – moški kot skupina imajo moč, vendar posamezni moški te moči niso deležni v svojih vsakdanjih interakcijah. Dokazovanje moškosti tako postane za (mlade) moške ključnega pomena, ne (samo) zato, ker želijo narediti vtis na ženske, ampak ker želijo biti »možati moški« (angl. man's men). Če jim ne

⁴ Kimmel (2008) opredeljuje »fante« predvsem kot bele, srednjega sloja, univerzitetno izobražene, heteroseksualne moške, stare od 16 do 26 let. V besedilu razlikujejo *dečke* za *boys* (osebe moškega spola do pubertete) in fante za *guys* kot dorele moške, v slovenščini se samostalniki *fantje* uporablja tudi v ekspresivni rabi za osebe moškega spola, ki jih družijo skupni interesi. Kimmel uporablja učinkovito besedno igro *being gay or guy*, kar v prevodu smiselno prevajamo kot *biti gej ali frajer*.

⁵ V srednji šoli je najpogostejši razlog za nasilno vedenje homoseksualnost (lahko samo navidezna), kar je običajno prispodoba za opisovanje moških/fantov kot »ne dovolj možatih« ali »nepravih moških/fantov«. »Neka raziskava je pokazala, da bi večina ameriških fantov raje dobila udarec v obraz, kot da bi jih označili za geje« (Kimmel 2008, 77). Fantje imajo možnost izbire: biti gej ali frajer (angl. *being gay or guy*).

uspe uprizoriti svoje moškosti uspešno in v primeru, ko prestopijo meje moškosti, lahko pričakujejo opozorilo in/ali kazen »spolne policije« (torej vrstnikov). Vsak takšen zdrs od ideala moškosti vodi v povezovanje s homoseksualnostjo, ki »postane nekakšna kratica za 'nemoškost'« (Kimmel 2008, 50). S tem mladi moški tvegajo, da bodo izgubili vse, svoje prijatelje, občutek lastne vrednosti, celo življenje. Tako je za moške (zlasti mlade) cena moškosti običajno visoka in se kaže predvsem v nasilju⁶ (nad drugimi in seboj), tveganem vedenju, pomanjkanju skrbi zase, večji nevarnosti poškodb in osiromašenih odnosih (Elliott 2016). To potrjujejo tudi številne študije, ki opozarjajo na povezavo škodljivih tipov moškosti ter slabega (duševnega) zdravja moških in fantov ter kažejo: da moški z močnimi predstavami o moškosti enkrat manj pogosto poiščejo zdravstveno oskrbo kot moški z zmernejšimi predstavami o moškosti (Springer in Mouzon 2011); da moški, ki bolj upoštevajo norme moškosti, pogosteje intenzivno uživajo alkohol in tobak (Mahalik, Burns in Syzdek 2007); da moški, ki bolj verjamejo v tradicionalno moškost, tudi redkeje poiščejo pomoč glede duševnega zdravja kot moški z bolj prožnimi stališči do spola (Yousaf, Popat in Hunter 2015) itd. V povezavi s tem raziskave kažejo tudi, da samomor naredi bistveno več moških kot žensk⁷ (Pappas 2019).

Kimmel (2008) ugotavlja, da so se pravila moškosti (sledenje »fantovskemu kodeksu«, angl. Guy Code, ki temelji na prepovedi čustev, nepriznavanju šibkosti – vedno prikazujejo, da imajo vse pod nadzorom –, zmagi in veliko spolnosti) v zadnjih nekaj desetletjih presenetljivo malo spremenila, in odgovor zakaj, je zelo preprost: ker fantje te ideje dosledno slišijo (in se jih naučijo) od moških v svojem življenju (očetov, bratov, prijateljev, trenerjev, dedkov, stricev), kar oblikuje njihovo predstavo o tem, kaj je moškost. Zato Elliott (2016) poudarja, da je analiza cene moškosti ključnega pomena pri prikazovanju koristi, ki jih bodo imeli moški od prizadevanja za enakost spolov in razvoja novih oblik moškosti.

Razprava o kritikah⁸ koncepta hegemonске moškosti R. W. Connell (Hearn 2011; Anderson 2009) je v zadnjih letih opozorila na možnost alternativnih moškosti, tj. moškosti, ki se kritično distancirajo od idealov hegemonске moškosti in sistematično raziskujejo načine, kako biti moški na nehegemonски način. Eric Anderson (2009) govori o vključujoči moškosti, ki v današnjih družbah postaja

⁶ Kimmel (2008) govori o tem, da je nasilje v šolah postalo »nova normalnost« in dobilo nove oblike, ki niso ne fizične ne verbalne, temveč virtualne (kibernetsko ustrahovanje). Po njegovem mnenju so posledice ustrahovanja, šikaniranja homoseksualcev in nasilja katastrofalne – mladi moški skušajo pobegniti pred resničnostjo tako, da se omrtvičijo z drogami in alkoholom, čutijo, da ne zmorejo obvladati situacije, in se zatečejo k samomoru ali pa so polni jeze, ki jo izražajo z nasilnimi izbruhi – v zvezi s tem avtor omenja čedalje pogostejša množična streljanja na ameriških šolah.

⁷ Ameriško psihološko združenje prepoznava, da spolno pogojene družbene vloge pri psihološki obravnavi zahtevajo pristope, ki so spolno specifični. Združenje je leta 2019 objavilo prve smernice v podporo delu psihologov in psihologinj z moškimi in dečki. Smernice za delo z ženskami in dekleti so bile prvič objavljene leta 2007 (Pappas 2019).

⁸ Kritike imajo podlago v širjenju različnih moškosti, ki dobivajo »glas«, kot so gejevske ali skrbne moškosti. Vendar pa glede na nedavne trende nasprotovanja »teoriji spolov« ostaja vprašanje, ali lahko te nove oblike moškosti resnično ponudijo stabilno in trajno alternativo, ki bo vzdržala pritisk »prave« (hegemonске) moškosti.

vse pomembnejša in temelji na tesnejših čustvenih odnosih z drugimi moškimi ter sprejemanju različnih vedenj, ki so tradicionalno veljala za ženska. Drug primer bolj odprtega tipa moškosti je koncept hibridnih moškosti, ki ga je predstavil Demetrakis Z. Demetriou (2001). Ta trdi, da je hegemonna moškost hibridni blok, ki vključuje prakse različnih moškosti. Tako meni, da sama hegemonna moškost ni monolitna, saj lahko nosilci hegemonne moškosti kažejo tudi značilnosti, ki niso njen del. Njegova predpostavka temelji na opažanju, da beli moški, ki v moški hierarhiji zasedajo položaje moči, prevzemajo kulturne elemente podrejenih in marginaliziranih moškosti ter tako ustvarjajo hibridno različico moškosti, v kateri moški ostajajo močni, vendar lahko pokažejo tudi občutljivost. Naslednja pomembna alternativna oblika moškosti je skrbna moškost, teoretični okvir, ki ga je razvila Karla Elliott (2016) in zavrača dominantnost ter vključuje vrednote, ki izhajajo iz etike skrbi, kot so soodvisnost, podpora, empatija, pozornost in soodgovornost. Velik pomen vidi v vključevanju pogleda na dejansko čustveno življenje moških v raziskave o moškosti. Avtorica izhaja iz pristopov kritičnih študij moških in moškosti ter feministične teorije skrbi⁹ in uporablja koncept skrbnih moškosti v množini (po Connell 2005). Skrbne moškosti vidi kot tiste, ki si prizadevajo za doseganje enakosti spolov in imajo pomembne pozitivne učinke ne le za moške. Elliott (2016) ugotavlja, da imajo skrbne moškosti pomembnejši potencial za uvajanje sprememb, in trdi, da lahko skrbstveno delo s praktičnega vidika spremeni spol.

V zadnjih nekaj desetletjih so se s transformacijo kapitalizma možnosti za druge vrste moškosti vse bolj odpirale ter vplivale na odločitve in prakse mladih moških o njihovi vlogi. Connell (2000) govori o zgodovinskem trenutku sprememb v spolni zavesti, zlasti v zvezi z moškostjo, in obravnava politične možnosti, ki izhajajo iz te zgodovinske zavesti. Elliott (2020) v svoji konceptualizaciji »odprtih in zaprtih moškosti«¹⁰ na podlagi obsežnega dela bell hooks (1990, 2000, 2004) v zgledni neoliberalni maniri opisuje obrobje kot prostor, ki odpira revolucionarni potencial za moškosti, saj spodbuja bolj odprte moškosti, in ne kot prostor, v katerem so moški prikrajšani. Avtorica konceptualizira obrobje tudi kot »prostor sprememb« in zanika, da so »marginalizirani ali podrejeni moški nekako bolj regresivni ali patriarhalni ali da so vedno obsojeni na to, da se na

⁹ Elliott (2016) se osredotoča na feministično teorijo skrbi, ki se je začela razvijati v sedemdesetih letih prejšnjega stoletja in se sprva osredotočala na problematično predpostavko, da je neplačano skrbstveno delo rezervirano za ženske, pa tudi na vidik enakih pravic in socialne pravičnosti moških in žensk. Danes to področje zajema tudi druga vprašanja in dileme, kot so skrb za starejše, skrb za otroke, samooskrba in do neke mere skrbstveno delo, ki ga opravljajo moški. Elliott poudarja, da je na današnje feministično delo o skrbnosti močno vplivala »feministična etika skrbi«. S feministične perspektive skrbnost ni obravnavana le kot praktična, temveč tudi kot relacijska, emocionalna, intimna in afektivna.

¹⁰ Elliott (2020) v svoji raziskavi uvaja in opredeljuje koncepta odprte in zaprte moškosti (*angl. open and closed masculinities*) kot ključnih orodij za razumevanje in obravnavo privilegijev v povezavi z moškimi in moškostmi. Zaprte moškosti, kot so hegemonne ali sodelovalne moškosti, vidi kot tiste, ki so postavljene v središče, bolj odprte moškosti, kot so skrbne, podrejene ali marginalizirane, pa na obrobje. Z opazovanjem različnih privilegijev (bela rasa, srednji sloj in heteroseksualnost), ki delujejo kot mehanizmi središča, jo zanima, kako se ti med privilegiranimi prepletajo in množijo.

pomanjkanje privilegijev odzovejo z nasiljem in agresijo» (Elliott 2020, 181-82). S tem prispeva k nastajajočemu korpusu raziskav o moških na obrobju, ki modelirajo preoblikovane in odprte moškosti ter predlagajo njihove nove egalitarne oblike.

Odzivi in odpor proti alternativnim moškostim

Odzivi na alternativne oblike moškosti so bili pozitivni, pa tudi skrajno negativni. Slednji so se oblikovali kot odgovor na širše in včasih radikalne spremembe v sodobni družbi, ki so veliko moškim povzročale težave. Vzpon storitvenega gospodarstva (na račun upada industrijske proizvodnje) in nestandardnih delovnih mest je močno spremenil javno sfero ter prispeval k: 1) povečanju brezposelnosti moških, kar je ogrozilo njihovo vlogo hraniteljev družine, in 2) množičnemu vključevanju žensk ne le v plačano delo, temveč tudi na področja, ki so bila prej rezervirana za moške (maskulinizirani poklici in sektorji, politika, ipd.), kar je spodkopalo predstavo o moški (ekonomski) superiornosti in moške postavilo v položaj, ko morajo tekmovati z ženskami za delovna mesta. Spremembe v javni sferi so povzročile tudi spremembe v zasebni, kjer je prišlo do preizpraševanja domneve o naravni moralni avtoriteti moških v družini, hkrati pa se je za moške razširil tudi prostor za večje vključevanje v skrbstveno delo. K eroziji tradicionalne podobe moških je prispevalo tudi javno problematiziranje intimnopartnerskega nasilja in nasilja v družini (npr. Podreka 2024), ki je zasenčilo podobo moških kot zaščitnikov družine, pomemben vpliv pa je zagotovo imel tudi napredek reproduktivne tehnologije, ki omogoča ločevanje spolnosti in razmnoževanja, pa tudi očetovstva itd. (Hrženjak 2016, 9).

Vse omenjene spremembe odgovornosti v odnosu do družine in javne sfere so privedle do t. i. krize moškosti, ki sodobnega moškega vidi kot odtujenega od svoje naravne, primarne moškosti, kot moškega, ki je izgubil svoje mesto in identiteto, ter kot zmedeno žrtev, ki mu spopadanje z žensko emancipacijo in spreminjanje tradicionalnih spolnih vlog povzroča občutek nemoči, pritiska in tesnobe (Prašnikar 2010; Elliott 2020). Ta kriza temelji na prepričanju, da je družba bolj osredotočena na ženske, kar pomeni, da feminizem velja za skupnega sovražnika in temelj strukturne moške viktimizacije ter globalne mizandrije (Preston, Halpin in Maguire 2021; Pease 2000). Diskurz o prikrajšanosti moških so prevzela nekatera gibanja za pravice moških (npr. nekatere skupine za pravice očetov do skrbništva po ločitvi, nekatere skupine za moške žrtve nasilja, gibanja za tradicionalno družino) ter populistična gibanja, ki vse večjo revščino, brezposelnost in degradacijo »jeznih belih moških«, o katerih piše Kimmel (2013), povezujejo s ksenofobijo, rasizmom, homofobijo in seksističnim delovanjem. Kimmel (2018a) v svoji analizi o nasilnih ekstremističnih gibanjih uvede koncept prizadete upravičenosti (angl. aggrieved entitlement), ki opisuje občutek viktimizacije moških, ki ne uživajo družbenih in gospodarskih koristi, do katerih naj bi bili upravičeni v skladu z dominantno predstavo o moškosti. Vključevanje v ekstremistična gibanja velja za obliko moške kompenzacije in nadomestno pot za dokazovanje

moškosti, ki je ne morejo več izvajati na tradicionalen način (na delovnem mestu, kot hranitelji družine). Kimmel (2018a) poudarja, da ni samo moškost tista, ki omogoča razumevanje teh gibanj. Pomembne so tudi druge (strukturne, politične, gospodarske) okoliščine in osebne zgodbe (doživljanje travm – ustrahovanja, spolna, fizična zloraba itd.), ki močno vplivajo na številne mlade moške, da se pridružijo skrajnim skupinam.

Eden od pomembnih prostorov artikulacije moškosti v zahodni kulturi, ki se je razvila kot konglomerat sodobnih moških gibanj z različnimi ideološkimi stališči, je manosfera. V okviru vzpona populističnih/antifeminističnih gibanj smo bili v zadnjih letih priče vse bolj mizoginemu in nasilnemu nasprotovanju feminizmu v manosferi ali med inceli, mednarodni skupini mladih moških, ki svoj življenjski položaj opisujejo kot neprostovoljni celibat ter za svoje neuspehe krivijo ženske in feminizem. Gre za (v glavnem spletno) skupnost, ki je nekateri avtorji in avtorice ne povezujejo le s kaznivimi dejanji iz sovraštva, temveč tudi s terorističnimi dejavnostmi in jo obravnavajo kot primer spletnega ekstremizma (Kanjuo Mrčela in Eterović 2022). Jordan B. Peterson, kanadski psiholog, je eden najbolj znanih avtorjev, ki kot odgovor na težave incelov promovira idejo o »odporu proti (spremembi) moškosti« (angl. backlash against masculinity) in priporoča »prisilno monogamijo« (Brabaw 2018). Zaradi svojih stališč o družbenih in političnih vprašanjih je bil deležen velike pozornosti, njegovi pogledi na moškost pa so v zadnjem času postali vse bolj priljubljeni, sočasno s povečano priljubljenostjo promoških, pogosto mizoginih vplivnežev, kot je Andrew Tate. Pojavljanje tovrstnih, na YouTubu/TikToku znanih osebnosti ali političnih komentatorjev se je zadnja leta zelo povečalo.

DOSEDANJE RELEVANTNE RAZISKAVE O MOŠKOSTI V SLOVENIJI

Analiza pregleda slovenske literature o moških in moškosti kaže, da je bilo to področje raziskovalno zelo marginalizirano, saj se je večina znanstvenih del osredotočala na perspektivo žensk ter problematizirala njihov podrejeni in manj ugodni položaj tako v javni kot zasebni sferi. Raziskovanje moških in moškosti je bilo tako pogostejše del raziskav o spolnih vlogah žensk in moških na splošno ter je bilo večinoma zajeto v publikacijah, ki so bile rezultat dela pri mednarodnih projektih.¹¹

Raziskovanje spolnih vlog žensk in moških vključuje analize delitve vlog po spolu v javni in zasebni sferi. Pri analizi javne sfere so se analize osredotočale predvsem na vlogo žensk in moških na trgu dela na splošno ali v izbranih poklicih, reprezentacije spolov v medijih in teme, kot so spolni stereotipi, diskriminacija, seksizem. Analize, osredinjene na vlogo žensk in moških v zasebni sferi, so obravnavale teme neplačanega dela žensk, delitve gospodinjskih in skrbstvenih

¹¹ Med projekti so bili npr. CARMIA, ENGAGED IN EQUALITY, ECAROM, STAND BY ME 2.0, STELLA in EMPATH. Za več glej Poročilo EMPATH o stanju in rezultatih raziskav; poglavje Projekti: https://www.fdv.uni-lj.si/docs/default-source/cpocv-doc/empath-report_2023-04-28_final-version_ul.pdf?sfvrsn=2.

obveznosti med spoloma, usklajevanja dela in družine, skrbstvenega dela v okviru skrbi za starejše, nasilja nad ženskami itd.

Konkretna analiza moškosti kaže, da je bila moškost v javni sferi analizirana predvsem z vidika političnih vlog, ki jih moški prevzemajo, in predstav o moškosti v politiki (npr. Antić Gaber, Crnović in Selišnik 2017; Crnović; 2014, 2017). Moškost v javni sferi je bila proučevana tudi v povezavi s feminiziranimi poklici/sektorji, kot so izobraževanje (npr. Kanjuo Mrčela in Revinšek 2017) in skrbstveni poklici (npr. Hrzenjak, Humer in Frelih 2018; Holtermann et al. 2019), analizo moškosti pa najdemo tudi v kontekstu vojske (Abram 2017), ki osvetljuje genealogijo (re)produkcije hegemonije moškosti v slovenski vojski.

Tematika moškosti je bila pogosteje tematizirana v kontekstu obravnave družbenih vlog v zasebni sferi, in sicer v povezavi s skrbstvenim delom (npr. Humer 2017; Šori 2018; Hrzenjak in Humer 2021a; 2021b), pri čemer so bile raziskovane predvsem prakse delitve dela doma med moškimi in ženskami ter vprašanja zastopanosti tematik spola in enakosti spolov v izobraževanju za poklic učitelja oz. učiteljice. Analize moškosti v kontekstu skrbi za otroke se osredotočajo med drugim na moške kot samohranilce (na primer Šori 2019; Humer, Hrzenjak in Frelih 2021; Humer 2022) ter moške kot zaposlene očete in njihove prakse usklajevanja poklicnega in zasebnega življenja (Humer in Frelih 2017). Moškosti v zasebni sferi so bile obravnavane tudi z vidika intimnopartnerskega nasilja (Podreka 2024).

V analizo dosedanjih raziskav o moškostih smo vključili tudi pregled analize mladih v Sloveniji, saj se naš članek ukvarja zlasti s to ciljno skupino, vendar pa nismo našli primerov, ki bi ti dve temi analizirali skupaj oz. intersekcijsko.

Metodološka zasnova

Pilotna raziskava, ki smo jo izvedli v okviru projekta EMPATH,¹² je temeljila na anketnem vprašalniku, ki je bil oblikovan in nadgrajen na podlagi elementov moškosti, opredeljenih v vprašalniku Conformity to masculine norms inventory (CMNI). Ta opredeljuje naslednje komponente toksične moškosti: zmagovanje, nadzor nad čustvi, tveganje, nasilje, dominantnost, promiskuitetnost, samozadostnost, dajanje prednosti plačanemu delu pred drugimi deli življenja, moč nad ženskami, prezir do homoseksualcev, prizadevanje za visok družbeni status. Na podlagi znanja iz kritičnih multidisciplinarnih študij moškosti smo vprašalnik dodatno razvili tako, da smo oblikovali šest dimenzij za analizo moškosti: 1) družbene vloge spolov v zasebni in javni sferi, 2) spolnost, 3) samozadostnost,

¹² Mednarodni projekt EMPATH, ki ga sofinancira Evropska komisija v sklopu programa Citizens, Equality, Rights and Values Programme (CERV), se zavzema za zmanjšanje diskriminacije na podlagi spola in krepitev enakosti spolov v izobraževanju. Pomemben poudarek projekta je obravnavati fante in moške kot del rešitve, ne le kot del problema. Za razliko od številnih drugih projektov se projekt EMPATH izrecno osredotoča na doseganje večje enakosti spolov z obravnavo in ugotavljanjem toksičnih vedenjskih vzorcev, povezanih z moškostjo, med srednješolci in srednješolkami v Sloveniji ter z dvigom senzibilnosti srednješolskih in univerzitetnih učiteljev in učiteljic za prepoznavanje in obravnavo vzorcev toksične moškosti v izobraževalnem procesu.

4) nadzor nad čustvi, 5) nasilje in 6) enakost spolov. Za vsako dimenzijo smo anketiranke in anketirance najprej vprašali, ali se strinjajo ali ne s trditvami o tej dimenziji (na petstopenjski Lickertovi lestvici). Nato sta bili postavljeni eno ali dve situacijski vprašanji, da bi ugotovili, kaj bi anketiranka ali anketiranec storil ali mislil v določenih okoliščinah.

V sklopu vprašanj o družbenih vlogah spolov v zasebni in javni sferi smo s petstopenjsko Likertovo lestvico analizirali različne dimenzije razumevanja družbenih vlog moških in žensk v zasebni in javni sferi: odgovornost za finančno stanje, gospodinjstva opravila, naravne razlike (na primer, ali so moški boljši vodje, bolj tekmovalni, bolj tvegajo, ali se jim zdi zmaga pomembnejša v primerjavi z ženskami). V sklopu vprašanj o spolnosti smo se osredotočili na stališča naših anketirank in anketirancev o štirih dimenzijah, in sicer o heteronormativnosti, heteroseksualnih vlogah, homofobiji in kulturi playboya (ženskarja), pri čemer smo se dotaknili tudi nasilja, povezanega s spolnostjo. Poglavje o nadzoru nad čustvi je vključevalo vprašanja o zatiranju in izražanju čustev ter vprašanja o deljenju čustev in iskanju pomoči v primeru čustvene stiske ali telesnih zdravstvenih težav. V sklopu vprašanj o nasilju smo analizirali več razsežnosti doje-manja nasilja moških, žensk in nasilja v odnosih ter razloge, s katerimi je nasilje upravičevano. V zadnjem sklopu vprašanj smo postavili šest trditev o enakosti spolov in odnosu do feminizma ter anketiranke in anketirance prosili, da ocenijo določena stališča.

Raziskava EMPATH je bila izvedena med srednješolci in srednješolkami ter srednješolskimi in univerzitetnimi učitelji in učiteljicami, vendar smo za ta članek analizirali le podatke srednješolk in srednješolcev. Zbirali smo jih od 21. februarja 2023 do 6. aprila 2023 s spletno anketo 1ka. O poteku ankete smo obvestili nekaj šol prek učiteljev in učiteljic družboslovja.

V vzorec pilotne študije je bilo vključenih 67 srednješolcev in srednješolk. Med njimi je bilo 64 % moških in 34 % žensk. Približno 2 % anketiranih je svoj spol navedlo v kategoriji »drugo«. Večina obiskuje štiriletno srednjo poklicno šolo (72 %), sledijo srednje šole in gimnazije (18 %). Starost anketiranih je bila od 15 do 23 let; največ jih je bilo starih 19 let (45 %).

Rezultati

V nadaljevanju predstavljamo ključne rezultate pilotne raziskave med slovenskimi srednješolci in srednješolkami ter utemeljujemo njihove odgovore glede: 1) družbenih spolnih vlog v zasebni in javni sferi, 2) spolnosti, 3) samozadostnosti, 4) nadzora nad čustvi, 5) nasilja in 6) enakosti spolov. Čeprav smo posebno pozornost namenili fantom in njihovem odnosu do moškosti, so nas zanimala tudi pričakovanja in odnos deklet do moških/fantov, saj domnevamo, da ta vplivajo na njihovo dojemanje in mnenje o praksah moškosti. Pri predstavitvi rezultatov smo zato vključili odgovore deklet in fantov ter po potrebi izpostavili razlike.

Rezultati so razdeljeni v šest omenjenih komponent moškosti, izvirna analiza

z vsemi podatki pa je na voljo v poročilu EMPATH Report on state of the art and research results.¹³

1) Družbene spolne vloge v zasebni in javni sferi

Pilotna študija je pokazala, da imajo srednješolci in srednješolke precej tradicionalna stališča glede družbenih vlog spolov v javni sferi. Menijo, da so moški po naravi boljši vodje kot ženske (71 %), da so bolj nagnjeni k tveganju kot ženske (71 %), da je tekmovalnost bolj v naravi moških kot žensk (65,4 %) in da je želja po zmagi moškim bolj pomembna kot ženskam (52 %), kar potrjuje povezanost lastnosti, kot so tekmovalnost, zmagovanje, tvegano vedenje, vodenje, izključno z moškimi.

V zvezi z vprašanjem zaslužka zlasti med fanti prevladuje prepričanje, da mora moški preskrbeti svojo družino¹⁴ in imeti zato boljšo plačo kot ženska. Večina srednješolcev in srednješolk (71 %) je situacijo, v kateri »ženska napreduje in dobi boljšo plačo kot moški«, dojela kot »odlično, saj bi to prineslo več denarja za vso družino«, vendar so rezultati glede na spol pokazali, da sprejema to situacijo manjši delež fantov (65 %) kot deklet (80 %). Skoraj četrtina vseh srednješolcev in srednješolk (23 %) je izrazila mnenje, da bi situacijo »sprejeli, vendar bi se počutili neprijetno«, prav tako pa ni nepomembno, da 6 % srednješolcev (vsi fantje) meni, da bi bila ta situacija zanje »neprijetna, ker mora imeti moški boljšo plačo«.

Podobno situacijo lahko vidimo pri zaznavi spolnih vlog v zasebni sferi. Rezultati kažejo, da srednješolci in srednješolke sicer sprejemajo, da očetje in matere izmenjajo svoje vloge pri skrbi za otroke, tako večina srednješolcev in srednješolk (52 %) meni, da bi v situaciji, »ko gre mama predšolskih otrok na službeno pot, moral oče v celoti poskrbeti za otroke in gospodinjstvo v času, ko je mama odsotna od doma«. Vendar so predstave četrtine vzorca o družini in odgovornostih staršev še vedno v veliki meri tradicionalne. Srednješolci in srednješolke namreč izberejo tudi dva odgovora, ki največ zasebnih odgovornosti nalagata materi – »da mati ne sme pustiti predšolskih otrok doma in oditi na službeno potovanje v tujino« (15 %) in da »mora mati pred službenim potovanjem poskrbeti za pomoč pri varstvu otrok in gospodinjskih opravilih« (10 %). Večina srednješolcev in srednješolk se tudi ne strinja, da mora moški/oče bolj kot ženska/mati skrbeti za gospodinjska opravila in vzgojo otrok.

2) Spolnost

Podatki pilotne študije kažejo, da je veliko srednješolcev in srednješolk konservativnih, ko gre za spolnost. Izrazili so mnenja, ki temeljijo na heteronormativnosti, saj menijo, da je edino pravo razmerje med žensko in moškim (tako

¹³ Poročilo je dostopno na: https://www.fdv.uni-lj.si/docs/default-source/cpocv-doc/empath-report_2023-04-28_final-version_ul.pdf?sfvrsn=2.

¹⁴ Večina srednješolcev in srednješolk (46 %) meni, da mora mož/oče bolj kot ženska/mati poskrbeti za dobro finančno stanje družine, vendar se še vedno razmeroma velik delež (31 %) srednješolcev in srednješolk s to delitvijo vlog po spolu ne strinja.

meni nekaj manj kot 40 % srednješolcev in srednješolk), in pretežno izražajo negativna čustva glede homoseksualnosti, pri čemer izstopajo predvsem fantje. Skoraj dve tretjini (62 %) srednješolcev in srednješolk bi se »počutilo grozno, če bi drugi ljudje mislili, da so homoseksualno usmerjeni«, kar še posebej velja za 76 % fantov v primerjavi z manj kot 50 % deklet. Študija je tudi pokazala, da bi se srednješolci in srednješolke počutili predvsem »jezne in osramočene, če bi kdo mislil, da so homoseksualno usmerjeni«, kar velja bolj za dekleta kot za fante, medtem ko bi fantje raje »poskušali pojasniti situacijo«. Polovico srednješolcev in srednješolk prav tako odbija intimnost med dvema moškima – znova več fantov (60 %) kot deklet (40 %). Dojemanje intimnosti med ženskami je pri srednješolcih in srednješolkah precej manj negativno – več kot polovica anketiranih ne čuti odpora do intimnosti med ženskami, pri čemer fantje bolj podpirajo to vrsto intimnosti kot dekleta.

Veliko srednješolcev in srednješolk (39 %) se tudi strinja s tradicionalnimi vlogami spolov v zvezi s promiskuitetno spolnostjo, saj menijo, da je »normalno, da moški pogosteje menjavajo spolne partnerje/partnerke kot ženske«, kar so odgovorila predvsem dekleta (65 % deklet in 23 % fantov), vendar se prav toliko anketiranih (39 %) s tem (močno) ne strinja. Več kot četrtnina srednješolcev in srednješolk (29 %) tudi meni, da je »želja po več spolnih partnericah za moške naravna, za ženske pa ne«.

V zvezi s spolnim soglasjem je študija razkrila nekaj skrb vzbujajočih informacij. Čeprav velika večina srednješolcev in srednješolk (90 %) meni, da ženske zavračajo spolne odnose, ker »si tega preprosto ne želijo«, več kot četrtnina srednješolcev in srednješolk meni tudi, da ženske to počnejo »kot del flirtanja«, ali ker želijo, da moški »še naprej hodi z njimi«. To velja tako za fante kot za dekleta. Medtem ko so predvsem fantje videli žensko zavračanje spolnosti kot »draženje«, rezultati kažejo, da žensko zavračanje spolnosti vidijo tudi kot »način manipuliranja z moškimi« in »igranje težko dosegljive«. Zmedenost glede privolitve v spolni odnos in glede razlogov za zavrnitev spolnega odnosa je problematična in osvetljuje pomemben vidik pri razumevanju razmerij (moči) med spoloma. Dejstvo, da se večina anketiranih (57 %) strinja s trditvijo, da »moški/fantje včasih ne razumejo, zakaj jih ženske/dekleta, ki se sprva do njih vedejo spolno provokativno, na koncu zavrnejo«, le še dodatno potrjuje to težavo.

Podobno je glede privolitve v spolnost v razmerjih: velika večina anketiranih meni, da dober partner drugega ne sili v nobeno obliko spolne aktivnosti (poljubljanje, dotikanje, spolni odnos itd.). Vendar se s tem ni strinjalo 10 % fantov (in nobeno dekle). V zvezi z varanjem v razmerju so srednješolci in srednješolke najpogosteje poročali, da bi prekinili razmerje (47,1 %), ob tem pa bi občutili razočaranje (41,2 %), žalost (45,1 %), jezo (37,3 %) in sovraštvo (13,7 %). Nekateri med njimi bi se s partnerjem/partnerko tudi pogovorili (19,6 %) ali se napili (15,7 %). Čeprav to velja le za izredno malo anketiranih, je mogoče opaziti, da je tudi nasilje, usmerjeno proti sebi ali drugim, obstoječa možnost, pri čemer so o možnosti samopoškodovanja poročala le dekleta, o možnosti poškodovanja druge osebe pa le fantje.

Rezultati na področju spolnosti kažejo na številna skrb vzbujajoča prepričanja in prakse, ki pa postanejo vsaj delno razumljiva, če razumemo, kje srednješolci in srednješolke prejmejo največ informacij o spolnosti. Raziskava je pokazala, da velik del anketiranih verjame, da se »lahko veliko o spolnosti naučijo iz pornografije« (četrтина srednješolcev in srednješolk), in si želi, da bi »izkusili partnerski odnos, kot je prikazan v romantičnih filmih« (več kot polovica srednješolcev in srednješolk).

3) Samozadostnost

Na splošno anketirani menijo, da je »dobro imeti bližnje, s katerimi se lahko posvetujejo o svojih težavah«, vendar pa rezultati kažejo prevladujočo prisotnost prepričanja, da morajo moški pokazati stoičnost in moč v težavnih okoliščinah, v katerih ni primerno, da prosijo za pomoč, in sami nikoli ne prosijo za pomoč. To prepričanje izkazujejo predvsem fantje. Kljub temu pa je problem še nekoliko širši, saj podatki kažejo tudi, da 40 % srednješolcev in srednješolk težko prosi za pomoč (brez večjih razlik glede na spol).

4) Nadzor nad čustvi

Rezultati kažejo, da anketirani menijo, da je »neprimerno, da moški govori o svojih čustvih« (22 %), kar so pogosteje izražali fantje kot dekleta. Vendar pa niso vsa čustva enako nesprejemljiva. Analiza kaže, da so predvsem čustva, kot so strah, žalost in sram, tista, ki za moške niso sprejemljiva, medtem ko sta čustvi, kot sta jeza in bes, videni kot povsem sprejemljivi.

Zadrževanje čustev se kaže tudi v okoliščinah, ko so bili srednješolci in srednješolke naprošeni, naj si predstavljajo, da so se razšli z osebo, ki jo imajo še vedno radi. Čeprav bi bil njihov prvi odziv »zaupati svoja čustva družinskemu članu/članici ali prijatelju/prijateljici« (večina vseh odgovorov), bi še vedno velik del srednješolcev in srednješolk (41 %) »zadržal svoja čustva zase in jih ne bi nikomur zaupal/a«, kar je zopet bolj verjetno pri fantih (47 %) kot pri dekletih (35 %). Pomemben vpogled v to področje razkrivajo tudi odgovori srednješolcev in srednješolk, ki kažejo, da nihče od anketiranih svojih občutkov ne bi zaupal strokovnjaku/strokovnjakinji, tj. ne bi poiskal strokovne pomoči.

Podobno se kaže tudi v primeru (ne)iskanja pomoči ob doživljanju nenavadne telesne bolečine, pri čemer so bile razlike med spoloma eksplicitno izražene. Namreč, več deklet (70 %) kot fantov (57 %) bi v tem primeru poiskalo zdravniško pomoč, več fantov (59 %) kot deklet (15 %) pa bi počakalo, da bolečina preneha, in se z njo ne bi ukvarjali.

5) Nasilje

Pilotna študija kaže na visoko pojavnost uporabe fizičnega nasilja v družbi. Rezultati kažejo, da le 33 % srednješolcev in srednješolk ni bilo nikoli fizično napadenih ter da le 22 % srednješolcev in srednješolk ni nikoli uporabilo fizične sile. Pri tem obstajajo pomembne razlike med spoloma, saj so fantje veliko

pogostejše vključeni v obe obliki pojavljanja nasilja (kot napadalci in kot napadeni) kot dekleta.

Na splošno pa srednješolci in srednješolke fizične sile v večini primerov ne vidijo kot upravičen odziv, vendar menijo, da je v nekaterih primerih uporaba fizične sile potrebna, in sicer kadar se morajo braniti pred fizično silo drugih ali v odzivih na intimne dotike osebe istega ali nasprotnega spola. Delež anketiranih, ki ne odobravajo, da se jih intimno dotika oseba istega spola, je večji (41 %) v primerjavi z osebo nasprotnega spola (25 %), kar prav tako potrjuje heteronormativnost med mladimi.

Pri trditvah, ki opisujejo moške in njihov odnos do nasilja, se večina srednješolcev in srednješolk z njimi ne strinja, kljub temu pa se 35 % (močno) strinja, da je »uporaba fizične sile v moški naravi«, kar utrjuje prepričanja o naravi določenih moških lastnosti, četrтина srednješolcev in srednješolk pa je neopredeljena, ko gre za trditev, da bi »moški/fant moral uporabiti fizično silo za doseganje ali ohranjanje svojega položaja v družbi«. Fantje, ki jim je predstavljena določena (nevarna) situacija, v kateri je prisotno nasilje, menijo, da ženske od moških pričakujejo nasilno vedenje oziroma reševanje konflikta – da uporabijo fizično silo za zaščito ženske, vendar se izkaže, da dekleta od fantov/moških pričakujejo bolj mirno reševanje konfliktov (da pokličejo policijo). Podobno se je pokazalo v odgovorih srednješolcev in srednješolk, ko jim je bila predstavljena situacija, v kateri dekle že eno uro kritizira svojega partnerja, pri čemer so srednješolci in srednješolke izmed vrste možnosti ocenili, da bi moški razmišljal tudi o uporabi bolj nasilnih reakcij, kot so kričanje in vpitje, razbijanje kakšnega bližnjega predmeta, zapijanje in pretepanje partnerke.

Po drugi strani pa velik del anketiranih (49 %) meni, da so ženske/dekleta tiste, ki pogosto izvajajo psihično nasilje nad moškimi/fanti, 28 % pa je neopredeljenih. To je pomemben vpogled v večinoma neizgovorjeni svet nasilja nad moškimi.

6) Enakost spolov

Stališča srednješolcev in srednješolk glede enakosti spolov odpirajo prostor za analizo tega, kaj si mladi predstavljajo pod feminizmom in enakostjo spolov. Velika večina anketiranih (61 %) meni, da je »feminizem odigral pomembno vlogo, vendar zdaj postaja škodljiv«, da »feministke zagovarjajo postopno prevlado žensk nad moškimi« (46 %) in, podobno, da »feministke (dejansko) sovražijo moške« (45 %). Prav tako ne verjamejo, da se feminizem bori za enakost spolov (47 %), in so prepričani, da je bila družbena enakost spolov že dosežena (43 %). Podrobno analizo bi zahtevalo tudi prepričanje, da »(družbene) enakosti spolov ni mogoče doseči zaradi naravnih razlik med moškimi in ženskami« (43 %). Velik delež srednješolcev in srednješolk (v povprečju tretjina pri vsakem vprašanju) je bil glede teh trditev neodločen, kar kaže na precejšnjo raven nevednosti oz. neozaveščenosti o vprašanju enakosti spolov.

Podobno smo ugotovili tudi pri vprašanju, kaj menijo o tem, da ženske v Sloveniji prevzemajo vodilne položaje v politiki in gospodarstvu ter to razglašajo

za veliko pridobitev za vso družbo. Le tretjina srednješolcev in srednješolk je to videla kot dobro stvar, saj se zavedajo, da družbena enakost med moškimi in ženskami še daleč ni bila dosežena. Na splošno pa rezultati kažejo, da srednješolci in srednješolke v velikem deležu (skupaj 43 %), izražajo predvsem strah in jezo. Navajajo strah pred ženskami, ki bi rade prevladovale nad moškimi, ter v zvezi s tem izpostavljajo jezo in ogorčenje nad ženskami, ki se preveč hvalijo (da je njihov položaj velika pridobitev za družbo), v resnici pa mislijo le na svojo kariero. Petina vseh srednješolcev in srednješolk tudi meni, da bi morali ob takšnih trditvah tudi moški na vodilnih mestih javno poudarjati svoj spol pri zasedanju položaja.

RAZPRAVA IN SKLEP

V članku smo se na podlagi pilotne študije osredinili na to, kako srednješolska mladina v Sloveniji dojema moškost(i).

Analiza je pokazala, da anketirani srednješolci in srednješolke moške in moškost povezujejo predvsem s tekmovalnostjo, zmagovalnostjo, tveganim vedenjem in vodstvenimi lastnostmi, moške in njihove dejavnosti pa povezujejo predvsem z javno sfero. Trdno so prepričani, da je moška naloga finančno poskrbeti za družino (moški kot hranitelj družine, ki mora imeti boljšo plačo kot ženska), in če tega ne zmore, se bo počutil nelagodno. Podobno je obravnavana tudi vloga moških v zasebni sferi. Naša preliminarne analiza potrjuje, da se dojemanje moškosti med anketirano srednješolsko mladino v Sloveniji osredotoča na problematične vidike hegemonске moškosti,¹⁵ ki vsebuje tisto, kar Kimmel (2008) imenuje fantovski kodeks, ki predpisuje prepoved čustev, nepriznavanje šibkosti in željo po zmagi kot najpomembnejše značilnosti »biti moški« ter vzpostavljanja in ohranjanja odnosov. Prevladuje torej mnenje, da moški ne smejo izražati svojih čustev, ker bi bili potem nemoški, razen če gre za tipično moška čustva, kot sta bes in jeza. Moški tudi ne smejo izraziti svojih čustev drugi osebi in se ji zaupati, s čimer bi razkrili svojo ranljivo plat. To vpliva tudi na iskanje (strokovne, medicinske) pomoči, saj moški in fantje običajno odlašajo z obiskom zdravnika ali drugega strokovnjaka oz. strokovnjakinje, kar ima lahko usodne posledice. Poleg tega mladi (zlasti fantje) menijo, da za moške ni primerno, da v stiski prosijo za pomoč, saj morajo pokazati stoičnost in moč.

Številne raziskave (Mahalik, Burns in Syzdek 2007; Springer in Mouzon 2011; Yousaf, Popat in Hunter 2015) potrjujejo, da stroge predstave o enodimenzionalnih vlogah moških in prisila k zadrževanju čustev pogosto vodijo v številne negativne navade in posledice, ki vplivajo na slabo (duševno) zdravje moških in fantov. Ta tako imenovana cena moškosti se najbolj očitno izrazi pri nasilju. Naša pilotna študija kaže, da je fizično nasilje med anketiranimi mladimi

¹⁵ Ugotovitev, da stališča mladih temeljijo na vzorcih zahodne hegemonске moškosti so (med drugim tudi) rezultat uporabe literature, ki ta koncept raziskuje v kontekstu zahodnih držav in bi z vključitvijo študij o moškostih iz sorodnih kulturnih kontekstov lahko pridobili tudi širše vpogled v hegemonске moškosti zunaj (zgolj) zahodnega konteksta.

zelo razširjeno, pri čemer so fantje v obeh oblikah nasilja (kot napadalci in kot napadeni) bolj udeleženi kot dekleta. V raziskavi se je potrdilo tudi delovanje mehanizmov hegemonije na način, ki temelji na ignoriranju ali distanciranju od homoseksualnih moških (Connell 2000). Strah fantov pred povezovanjem s homoseksualnostjo, ki »postane nekakšna kratica za ,nemoškost« (Kimmel 2008, 50), le še povečuje pritisk nanje, da se prilagodijo idealom moškosti. Eden od načinov, kako zavrni stigmo homoseksualnosti in vrstnikom dokazati svojo heteroseksualnost ter zagotoviti trdne dokaze, da so »pravi moški«, je, da imajo spolne odnose z dekleti, kar pa je za številne fante v resničnem življenju težko uresničljivo in jih postavlja v položaj, v katerem se počutijo nezadovoljene, v skrajnih primerih pa vodi v frustracije in sovraštvo do žensk (npr. inceli). V tem kontekstu srednješolci in srednješolke v Sloveniji žensko zavračanje spolnosti večinoma razumejo kot del flirtanja, draženja, igranja težko dosegljive punce ali celo kot način manipuliranja z moškimi, kar kaže na pomanjkljivo razumevanje koncepta spolne privolitve med njimi. Jasno je tudi, da fantje včasih ne razumejo, zakaj jih dekleta, ki se sprva do njih vedejo spolno provokativno, na koncu zavrnejo, kar problem le še pogloblja. To izkrivljeno dožemanje spolnosti ni nič nenavadnega, če upoštevamo, da veliko mladih v naši raziskavi znanje o spolnosti črpa iz pornografije ali romantičnih filmov. Oba vira informacij ustvarjata izmišljene in nerealne predstave o spolnosti in spolnih praksah, kar posledično ustvarja množico slabo obveščenih in nepripravljenih mladih ljudi, ki se (pogosto prvič) odločajo za spolne dejavnosti.

Naša pilotna raziskava je tudi pokazala, da mladi v Sloveniji enakosti spolov in feminizma ne dojemajo pozitivno ter si na splošno ne prizadevajo za večjo enakost spolov. To je problematično in asociira na konservativna, mizogina in »antigenderska« stališča, o katerih pišemo v našem članku, hkrati pa opozarja na to, da mladi po večini feminizma ne razumejo na isti način kot starejše generacije, (predvsem tiste) ki so sodelovale v feminističnem boju za enakost spolov in so novo priborjeno enakopravnost doživele na lastni koži.¹⁶ Mladi v naši raziskavi v zvezi s feminizmom in enakostjo spolov izražajo predvsem strah in jezo. Ne verjamejo, da se feminizem bori za enakost spolov, in ga vidijo kot škodljivega. Takšna mnenja imajo običajno (mladi) ljudje, ki spremembe v današnji družbi, ki so zamajale tradicionalne predstave o ženskah, moških, ženskosti in moškosti, vidijo kot nepravilne in problematične za (zlasti) moške (Hrženjak 2016), zato se poskušajo boriti proti okoliščinam, ki so prispevale k njihovemu negotovemu položaju v družbi, z različnimi oblikami nasilja ali eskapizma, kar ima lahko zanje uničujoče posledice (Kimmel 2008; Kimmel 2018a). Mnenje slovenske srednješolske mladine, ki je po naši oceni potrebno nadaljnje poglobljene analize, če hočemo nadaljevati v smeri emancipacije spolov in boljše družbe, je, da do

¹⁶ Velike razlike v razumevanju feminizma so vidne v primerjavi med srednješolci in srednješolkami ter drugimi anketiranimi skupinami – srednješolskimi in univerzitetnimi učitelji in učiteljicami, kjer slednji izkazujejo precej večjo podporo feminizmu in enakosti spolov.

(družbene) enakosti spolov ne more priti zaradi naravnih razlik med moškimi in ženskami. Čeprav je argument o naravnih razlikah med spoloma v akademskih razpravah zastarel, ga še vedno pogosto uporabljajo mainstreamovski avtorji in vplivneži (Peterson, Tate, Walsh idr.), ki poudarjajo potrebo po retraditionalizaciji spolnih vlog. Takšna prepričanja niso nevarna le za ženske, temveč tudi za moške, saj vodijo k ponovni potrditvi hegemonске moškosti in njenih škodljivih posledic za (mlade) moške. Ker gre za pomembno področje, bi bilo potrebno v nadaljnjih analizah ugotoviti, iz katerih praks se negativno mnenje o feminizmu napaja.

Na podlagi rezultatov pilotne študije ugotavljamo, da so predstave slovenske srednješolske mladine o moškosti še vedno zelo enodimenzionalne in temeljijo na podobi moškega, čigar glavna vloga je biti uspešen v javnem življenju in skriti tiste dele sebe, ki kažejo na šibkost in ranljivost. Omenjena študija je pilotna, kar pomeni, da je bil glavni namen preizkusiti merski instrument in postopke. Tudi rezultate študije je zato treba razumeti v tej luči, pri čemer govorimo zgolj o preliminarinih in indikativnih podatkih, ki jih ne moremo posploševati na vso populacijo srednješolske mladine v Sloveniji. Upoštevati je potrebno tudi, da se stališča mladih razlikujejo tudi glede na tip šole, pri čemer moramo omeniti, da so srednješolci in srednješolke gimnazij podreprezentirani glede na vso populacijo. Kljub temu pa je raziskava prispevala zelo pomembne uvide v tematiko moškosti ter odprla številna nova vprašanja in področja raziskovanja, ki jih želimo nasloviti v nadaljnjem raziskovanju te teme. Tematiki moškosti se tako želimo posvetiti bolj poglobljeno, z izvedbo kvantitativne raziskave na reprezentativnem vzorcu, in se usmeriti predvsem na raven analize moškosti na trgu delovne sile. Zanimajo nas tudi prakse komuniciranja o toksični moškosti, kar nameravamo raziskati s kvalitativno analizo. Pilotna študija je pokazala potrebo, da se mora vprašanje socializacije v spolne identitete še naprej poglobljeno raziskovati, ker je iz njih mogoče ugotavljati potenciale za napredovanje v emancipaciji posameznikov in posameznic in celotne družbe.

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UNDERSTANDING MASCULINITIES AMONG HIGH SCHOOL YOUTH IN SLOVENIA

Abstract. *The topic of men/masculinity has received considerable attention worldwide, albeit not so much in Slovenia. After conducting a pilot study to directly measure Slovenian high school youth's perceptions of masculinities, we established that their perceptions are based strongly on Western hegemonic models of masculinity that stress the image of a strong, competitive, fearless man who must financially provide for his family, is not allowed to show feelings or seek help, and is expected to frequently change sexual partners and solve problems violently. The study provides important insights into masculinity in the Slovenian context and is an useful starting point for further research on this topic.*

Keywords: gender, masculinity, masculinities, youth, stereotypes.

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THE INDIAN EARNING COUPLE – ROLE STRESSORS, INTER-ROLE CONFLICT AND MODERATION IMPACT OF WORKPLACE SOCIAL SUPPORT**

Abstract. *Due to a lack of support resources, the nature of family and work settings causes Indian earning couples to experience an imbalance while performing their work and family roles. The study developed and tested a model for investigating the moderation impact of two such social support resources in the workplace – supervisor and co-worker – on the inter-role conflict faced by an Indian earning couple. Data were collected and analysed in relation to 676 members of earning couples from 11 major Indian cities using snowball sampling. An interesting finding is that even though both Work Overload (WO) and Family Overload (FO) contribute significantly as role stressors, the individual variable impact created by WO is less effective than FO on inter-role conflict. Although workplace social support showed a moderating effect on inter-role conflict, on the individual variable level co-worker and supervisor support less effectively moderated the inter-role conflict created by FO compared with WO. Practical implications of the study are outlined with respect to business and future research directions.*

Keywords: *role stressors, work overload, family overload, supervisor support, co-worker support, inter-role conflict, indian earning couple.*

INTRODUCTION

The Indian economy's privatisation and globalisation have brought considerable changes. In the 21st century, urban areas in India have seen employment

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opportunities grow, necessitating the migration of workers, including women, to those locations. Urbanisation has also created a new economic context in which husband and wife have become family breadwinners (Sánchez-Mira 2021). However, their inflexible work hours mean that modern urban workplaces leave individuals with limited or no options for managing work–life balance. Workplaces have often overlooked the family roles played by their workforce (Beardshaw 2004). Technological advancements and global competition have added to work demands, pushing employees to increase their work delivery pace (Valcour 2007). Driven by technological advancements and organisational interventions, employees working in modern organisations can perform work anytime and from any location. This possibility provided by technology has eroded work and life boundaries, increasing the chances of inter-domain spillovers and more frequent influences (Ashforth, Kreiner, and Fugate 2000).

For a long time, the traditional Indian joint family system was a vital social institution that prioritised collective well-being over individual aspirations. Its foundational structure was crucial for ensuring its members' emotional and economic stability. Joint families provided a robust framework supporting children and elderly family members, showing remarkable adaptability and resilience amid changing societal norms (Gopalakrishnan 2021; Sudha G Hiremath 2023). By distributing household responsibilities equitably, with women managing domestic duties and men focusing on working outside and earning, joint families fostered strong familial bonds, reduced individual stress, and created an environment of security that nurtured emotional and mental well-being (Joshi and Sheorey 2019; S. Singh 2020).

The rise of dual-income households, driven by earning couples, has led to a shift in Indian family structures from collectivist joint families to individualistic nuclear arrangements. The transition has lowered reliance on extended family networks and reshaped family dynamics. Balancing work–life responsibilities alongside dual careers often leads to role strain, limited family bonding, and greater stress, negatively affecting earning couples' well-being (Gopalakrishnan 2021; Arsi 2020).

The growing participation of women in the workforce has disrupted traditional gender roles, adding complexity to family dynamics as couples have struggled to balance career aspirations and household responsibilities (Arsi 2020; S. Singh 2020). The nuclear family model, which often lacked intergenerational support, left earning couples solely responsible for managing child-rearing and elder care together with professional commitments. This led to emotional isolation, increased mental health challenges and weaker social support systems (Sudha G Hiremath 2023). The under-involvement of spouses (Natarajan and Thomas 2002), particularly men, with children and family members, also increased stress on the family and work fronts.

Large numbers of women participating in the Indian labour market created earning couples. The demanding job roles and cross-domain influences have

kept earning couples more occupied with work, preventing them from spending quality time with their families. Demanding work roles have altered the family structure and compositions, neglecting the boundaries of work and family aspects and the typical factors in work-family conflicts (Yucel, Şirin, and Baş 2023). Working simultaneously and full-time, both partners started to make demands in the work and family domains. The constant rise in demands led to overloads, making it harder for earning couples to balance work and family aspects (Hill et al. 2001). Earning couples' engagement in conflicting roles caused role overloads, resulting in inter-role conflicts (Greenhaus and Beutell 1985; Nimmi et al. 2023; Mellor and Decker 2020).

Cultural bondings, societal norms and economic factors unique to India compound the challenges earning couples face in balancing their work and family responsibilities. Most studies on Indian earner couples' work-family-related inter-role conflict focused primarily on general experiences with work-family conflicts (Baral 2020; Buddhapriya 2009; Uttam et al. 2011). Existing research on earning couples provides a good snapshot of workplace characteristics and job-related aspects as antecedents to work-family conflict (Michel et al. 2011; Kundu et al. 2016). Studies have examined the role of individual variables like cultural norms, work-life enrichment, organisational support, gender roles, and family support in moderating the impact of inter-role conflict caused by work and family overloads. Nevertheless, the relationship between role stressors, such as work and family overload, and inter-role conflict remains underexplored. In addition, previous studies have not sufficiently examined how workplace support variables, like co-worker support, supervisor support and organisational policies, moderate the impact of role stressors on inter-role conflict.

The need for empirical studies on work-family conflict in countries where the family as an institution is very strong and women's participation in work is growing is also noted in the literature (Poelmans 2011). A family with both the husband and wife making an income is still a new concept in India (Jyothi and Neelakantan 2014).

Noting the limited studies and the rising trend of earning couples in the Indian context, the study examines role stressors (work and family overload) as predictors of inter-role conflict among Indian earning couples. Also investigated is whether workplace support (supervisor, co-worker, and organisational policy support) moderates the inter-role conflict these stressors cause.

LITERATURE AND THEORETICAL BACKGROUND

Several theories provide insights into work-family reconciliation. In the Indian context, cultural, societal and institutional factors influence individuals' ability to balance their work and familial roles. The role conflict theory highlights the challenges posed by competing demands between work and family roles, notably for women in dual-earner households (Valk Reimara and Srinivasan Vasanthi 2011). The ecological systems theory (Urie Bronfenbrenner

1979) examines the influence of external systems such as family, workplace, and cultural norms on individuals, stressing the role of societal expectations in shaping work–family dynamics in India (Parveen Kalliath, Kalliath, and Chan 2017). The social exchange theory underscores the reciprocity between family members, such as providing emotional and practical support, which helps to reconcile professional and domestic roles (Rajadhyaksha and Velgach 2015). The gender role ideology emphasises the persistence of traditional gender roles that often restrict women’s career progress and impose greater caregiving responsibilities on them (Smita and Rajadhyaksha 2004). The work–family enrichment theory explores the possibility of a positive spillover between work and family domains, particularly among women entrepreneurs who find personal fulfilment through dual engagement (Sehgal and Khandelwal 2020). Cultural collectivism illustrates how the interdependence and shared responsibilities within Indian families can support and constrain work–family balance, reflecting the complex dynamics of collectivist societies (Raina, Ollier-Malaterre, and Singh 2020).

The inter-role conflict that work and family conflict creates can be a stressor (Zhang, Rasheed, and Luqman 2020). Stressor-related frameworks traditionally relied on role theory to deal with work roles. However, role theory places less emphasis on family roles, which are critical in analysing any impact of inter-role conflict (Barnett and Gareis 2006) in the Indian context. This led to the Conservation of Resources (COR) theory proposed by Hobfoll (Hobfoll 1989), which considers assets or resources, being selected for this study. According to the COR theory, stress happens at work and in the family due to asset erosion, mostly in one domain, causing resource imbalances (Hobfoll 1989) that eventually affect other domains and roles. Every individual possesses a finite number of resources. The consumption of resources in one domain (work) results in a shortage of resources in another domain (family). The resource shortage adds to the likelihood of a conflict emerging between the two domains (Ribeiro et al. 2023). When dealing with work and family roles, individuals may lose resources like time and energy, which leads to stress and role conflicts (Grandey and Cropanzano 1999). The COR theory states that work-related outcomes can be forecasted based on the resources available to employees, and any adverse work events will result in resource depletion. Therefore, the study used COR theory to derive its model based on the role stressors described below.

Earning couples often encounter role overloads since they play multiple roles in their family and professional lives. Work and family roles are important (Grandey, Cordeiro, and Crouter 2005). Different behaviour is expected in each role, which has its own challenges and demands. The desire to play several roles efficiently, effectively and simultaneously causes conflicts and stress (Grönlund and Öun 2010). Managing these roles with minimum conflict results in satisfaction and positive experiences (Clark 2000). Still, these roles establish substantial role overloads in family and work areas (Matthews et al. 2013), creating role conflicts.

Role conflict occurs when an individual simultaneously performs multiple varying roles. The demands arising from one role are inconsistent and conflict with another role being played by the individual at the same time (Vatharkar and Aggarwal-Gupta 2020). The demands or overloads created by discordant roles lead to inter-role conflicts.

Work and family are two domains that often have conflicting interests, causing inter-role conflicts. Managing and balancing aspects of these two domains at once with equal efficiency is daunting. Switching between family and work frequently leads to inter-role conflict (Zedeck and Mosier 1990). One-third of the earning couples who visited the American Association of Marriage and Family Therapy reported work–family issues related to balance (Haddock and Bowling 2008). In the case of an earning couple, inter-role conflict operates in two directions for each partner, i.e., the family role can interfere with work, and the work role can interfere with the family (Grzywacz and Demerouti 2013). Due to this, researchers started identifying inter-roles via the lens of role overloads and the conflicts created by these overloads.

Indian earning couples generally encounter two forms of role overload: work overload and family overload, which leads to inter-role conflict, otherwise known as work–family conflict (WFC) and family–work conflict (FWC) (Guterk et al. 1991).

Work–family conflict (WFC) occurs when the demands and responsibilities of work roles, such as long work hours and prolonged working weeks, are incompatible with the family domain (Allen 2001), thereby creating conflict. In terms of earning couples, work–family conflicts are more due to work infiltrating into family boundaries.

Family–work conflict (FWC) arises from family role events intervening in work-related roles, such as being unable to attend to office responsibilities because of a medical exigency in the family (Byron 2005; Viswesvaran, Sanchez, and Fisher 1999).

Inter-role conflicts arising from role stressors (work and family overloads) are associated with a range of adverse outcomes (Yavas, Babakus, and Karatepe 2008; Esson et al. 2004).

The workplace is the exact place or location where an employee performs their job. An employee spends over one-third of their life in the workplace. The workplace is also an important social space after one's home. Social support comes from various sources in the workplace, such as supervisors and co-workers (Parasuraman, Greenhaus, and Granrose 1992). Workplace social support acts as a coping resource that can ease the adverse effects of stressors encountered in work and family domains (Parasuraman, Greenhaus, and Granrose 1992; Thomas and Ganster 1995). Such social support also acts as a buffer and reduces the impact of psychological strain created by stressors (Ganster, Fusilier, and Mayes 1986). Supervisors and co-workers provide a supportive environment that helps improve productivity and maintain work–life balance.

With the workplace becoming ever more competitive and demanding, employees are becoming more vulnerable to inter-role conflict. Employees have begun looking at various resources and support systems to address the conflicts arising from the roles in which they are involved. One potential source of workplace social support is co-workers. A co-worker is a hierarchical peer (Raabe and Beehr 2003) who tends to use the same workspace, either shares or performs similar duties, and is an integral part of work life. A co-worker who is a confidant can enrich the work-life experience (Thomas W. H. Ng and Sorensen 2008) by providing support, easing the workload, and making the workplace environment more palatable (Neves and e Cunha 2018). Co-worker support contributes significantly to strain reduction (Terry A. et al. 2000), job satisfaction (L. Ducharme and Martin 2000), decreases occupational stress (L. J. Ducharme, Knudsen, and Roman 2007), and reduces psychological distress caused by the work environment (Sloan 2012).

The support co-workers provide makes the work environment better (L. et al. 2000), lowers work-related burnout (Constable and Russell 2010), and helps to reduce work-family conflicts (Blom et al. 2014).

One form of workplace social support is supervisor support (Parasuraman, Greenhaus, and Granrose 1992). Such support can be described as “supervisor behaviour towards employees to achieve a balance between their responsibilities at work and home” (Thomas and Ganster 1995). Yet, supervisor support can also be viewed as the extent to which an employee perceives that their supervisor appreciates their contribution to the work and cares about their family’s well-being (Eisenberger et al. 2002). Supervisors help employees boost their performance and assist them in coping with complex work situations. They also help alleviate work stress, which otherwise creates inter-role conflict. Any support received by employees empowers them to perform their work roles effectively and may also impact their family roles.

RESEARCH PROBLEM

With an increasing number of women joining the workforce, Indian earning couples are struggling to balance their family and work responsibilities. They are experiencing more significant conflicts from the demands to share family responsibilities (Haworth and Lewis 2010). Concerns related to inter-role conflict are thus becoming more important. This makes it necessary to understand the effect of the support co-workers and supervisors provide in reducing inter-role conflict (Allen 2001).

RESEARCH HYPOTHESIS AND MODEL

The study aims to answer two key questions: Is there any relationship between role stressors (work overload and family overload) and inter-role conflict? Can the support that supervisors and co-workers provide offset the harmful effects of role stressors and lower their impact on inter-role conflict?

It is argued in this study that the workplace support provided by supervisors and co-workers is essential for dealing with the inter-role conflict created by work and family overload. The perceived support from co-workers and supervisors helps couples to manage aspects of their work and family.

In line with the above, the study presents the following hypotheses:

H₁: There is a positive relationship between role stressors and inter-role conflict.

H_{1(a)} There is a positive relationship between work overload and inter-role conflict.

H_{1(b)} There is a positive relationship between family overload and inter-role conflict.

H₂: Workplace support has a negative moderating effect on the relationship between role stressors and inter-role conflict.

H_{2(a)} Supervisory support has a negative moderating effect on the relationship between work overload and inter-role conflict.

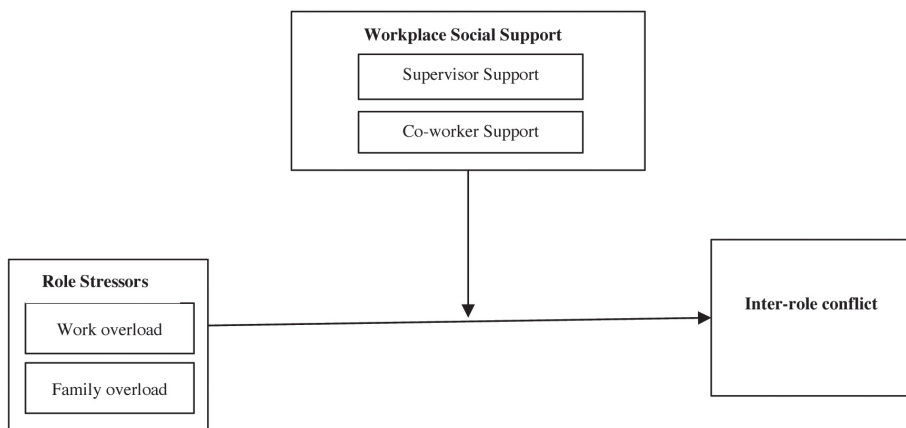
H_{2(b)} Supervisory support has a negative moderating effect on the relationship between family overload and inter-role conflict.

H_{2(c)} Co-worker support has a negative moderating effect on the relationship between family overload and inter-role conflict.

H_{2(d)} Co-worker support has a negative moderating effect on the relationship between work overload and inter-role conflict.

Conceptual model

Figure 1: CONCEPTUAL FRAMEWORK OF ROLE STRESSORS AND INTER-ROLE CONFLICT AMONG EARNING COUPLES WITH WORKPLACE SOCIAL SUPPORT AS A MODERATOR



Source: Researchers compilation.

MATERIALS AND METHODS

The study was conducted in 11 major Indian cities: Mumbai, Delhi, Bangalore, Chennai, Ahmedabad, Chennai, Kolkata, Surat, Pune, Jaipur, and Bhubaneswar. The primary data for the research were collected from one member of earning couples with full-time employment and who was working in the organised sector and meeting the age criteria of 20–60 years. Using a structured questionnaire and snowball sampling technique, the researchers collected data from 676 respondents. The questionnaire was prepared after reviewing the relevant literature using the existing scales. The researcher pre-tested the drafted questionnaire. Based on the pre-test inputs, certain items in the questionnaire were re-worded and reframed to avoid response bias.

Part 1 of the questionnaire consists of general demographic details, and part 2 of questions related to work overload, family overload, workplace social support, and inter-role conflict. The five-point Likert work overload instrument developed by Price and Mueller (Price and Mueller 1981) and later modified by Iverson (Iverson and Roderick Dale 1992) was used to measure work overload. The instrument consists of four questions. The five-point Likert family overload instrument developed by Thiagarajan (Thiagarajan, Chakrabarty, and Taylor 2006), a modified version of Michael D. Reilly's (Reilly 1982) instrument, was used to measure family overload. The workplace social support aspects in the study are measured using co-worker and supervisor support. A multidimensional instrument on perceived social support (MSPSS) (Zimet et al. 2010) was used to measure workplace support. The MSPSS instrument is a 12-item, self-reporting inventory measuring perceived social support. The friends' factor group part of the instrument is considered for co-workers and supervisors. The co-worker questions were interchangeably used by switching the word co-worker in each question to supervisor, and the seven-point Likert scale was appropriately modified to five points. A five-item Likert scale of work–family and family–work conflict instruments was used to measure inter-role conflict. The instruments consist of five items each and were proposed by RG Netemeyer (Netemeyer, Boles, and McMurrian 1996). The study relied on existing theories to develop hypotheses and a quantitative correlation approach to generalise the findings.

DATA ANALYSIS AND INTERPRETATION

Demographic Data Analysis

Even though the same number of questionnaires was distributed to participants across all 11 cities, the number of valid responses received from participants was not equal. The highest responses (65) were received from Bhubaneswar, Kolkata and Delhi, while the lowest (58) came from Ahmedabad, Mumbai, Pune and Surat. Among the 667 respondents, 55.6% (371) were female and 44.4% (296) were male. Most survey participants (465 or 69.7%) in the study fell into the age group 21–30 years, while 3% of the participants (20) were in the

age group 51–60. The age group 21–30 represents young working people whereas 31–40 represents the middle-aged working group. The age bracket 21–40 is a working and earning group and broadly represents India's modern workforce, which is made up of earner couples. Among the 667 respondents, 267 (40%) work in the public sector, while 400 (60%) work for private sector companies. These data align with the current trend of the private sector increasingly dominating the provision of employment opportunities.

Descriptive Statistics

Stress and inter-role conflict models are based upon the interactions of stress, strain, and various coping resources. The study examined work overload and family overload as role-based stressors as causal factors in inter-role conflict. It also considered the moderating/buffering effects of workplace social support on inter-role conflict.

The respondents were given a Likert-scale questionnaire with a list of statements under each head, where 1 stands for strong disagreement with the statement and 5 for strong agreement. Since scale questions were used in the survey, the data collected were distributed normally. Descriptive statistics such as mean, standard deviation, skewness etc. were therefore used to summarise the responses.

Item mean scores indicated that the respondents showed neutral to strong agreement. The standard deviation indicated a variation among responses. Skewness and kurtosis are well within the range of acceptance, indicating that the data were normally distributed and not out of the curve.

Scale Validity and Reliability

The PCA model was initially run with all items in the questionnaire. Based on the results, factors with a loading of less than 0.30 and correlated with more than one factor were deleted in the following run to obtain a favourable Kaiser-Meyer-Olkin (KMO) value and total variance explained.

Model Fit

The KMO test was used to measure the sample adequacy for each variable in the research model, determine the suitability of the collected data for factor analysis, and measure the proportion of variance among the variables in the given data set. KMO values closer to 1.0 are considered ideal, and values less than 0.5 are unacceptable.

Bartlett's test yielded a chi-square value of 13055.671 with 659 degrees of freedom and a significance value of .000 (< 0.05). Based on this, the given correlation matrix is not an identity matrix, and the matrix was factorable. Therefore, the result is significant. The variables are correlated and the data are suitable for factor analysis.

The item communality test indicated that the communality values, ranging from 0.533 to 0.891, are above the cut-off values, which means the common factor retains the original information.

To identify the underlying dimensions of the dataset in question, the total variance of the interconnected items was extracted by applying principal component analysis (PCA) using the varimax and Kaiser normalisation method for factor rotation. Compared with low-value variables, the high-value variables are represented in the common factor space. Low-value variables not represented in the common factor space were removed to eliminate performance variations. In addition, all the squared loadings were eliminated. The final sum of loading with eight components is 70.521%.

Rotated component matrix

Table 1: TABLE OF ROTATED COMPONENT MATRIX

No	Statement	1	2	3	4	5
1	My job requires me to work too fast.	0.865				
2	My job leaves me with very little time to get everything done.	0.842				
3	My job requires me to work very hard (physically or mentally).	0.828				
4	I often have to work overtime.	0.822				
5	The demands of my work interfere with my home and family life.	0.807				
6	Due to work-related duties, I have to change my plans for family activities.	0.757				
7	The conditions of my work life are excellent.	0.726				
8	In my family life, I do not ever seem to have any time for myself.		0.85			
9	In my family life, there are times when I cannot meet everyone's expectations.		0.798			
10	The demands of my family or spouse/partner interfere with work-related activities.		0.79			
11	In my family life, I have to do things that I do not really have time and energy for.		0.768			
12	Family-related strain interferes with my ability to perform job-related duties.		0.755			
13	In my family life, I need more hours in the day to do all the things that are expected of me.		0.742			
14	I can talk about my workplace problems with my co-worker.			0.798		

No	Statement	1	2	3	4	5
15	I can count on my co-workers when things go wrong at the workplace.			0.786		
16	My co-worker really tries to help me at the workplace			0.786		
17	I have a co-worker with whom I can share my workplace joys and sorrows			0.753		
18	I find real enjoyment in my job.			0.749		
19	Most days, I am enthusiastic about my job.			0.711		
20	I have a supervisor with whom I can share my workplace joys and sorrows.				0.833	
21	I can talk about my workplace problems with my supervisor.				0.78	
22	I am satisfied with the progressive support extended by my supervisor towards meeting my work-life balance				0.768	
23	I can count on my supervisor when things go wrong in the workplace.				0.735	
24	My supervisor tries to help me at the workplace.				0.701	
25	My job produces strain that makes it difficult to fulfil family duties.					0.796
26	The amount of time my job takes up makes it difficult to fulfil family responsibilities.					0.739
27	Things I want to do at home do not get done because of the demands my job puts on me.					0.731
28	I have to put off doing things at work because of demands on my time at home.					0.73
29	My home life interferes with my responsibilities at work, such as getting to work on time, accomplishing daily tasks, and working overtime.					0.719

Extraction method: principal component analysis

Rotation method: Varimax with Kaiser normalisation

Rotation converged in 7 iterations

* Factors with loadings greater than 0.30 were considered for content validity and model fit

Source: Researchers compilation.

The rotated component matrix reduces the number of factors with a high loading. The rotation matrix, without any change, makes the interpretation easier. The table above shows the factors that were loaded under each construct. The Work Overload factor had a factor loading of between 0.865 and 0.726. The family Overload factor had factor loadings ranging from 0.850 and 0.742. Supervisor support had factor loadings of between 0.833 and 0.701. The factor describing inter-role conflict had factor loadings of between 0.796 and 0.719. Overall, only those factors with factor loadings above 0.30 were considered to check the content validity and model fit.

The items selected from the exploratory factor analysis (EFA) were checked for convergent validity and average variance extracted (AVE). The findings showed that the construct's reliability is greater than required. The composite validity values across all of the dimensions exceeded 0.70, and the average variance explained was above 0.500. Overall, the construct showed that the items are internally consistent, while variance was also found to be adequate.

Structural Equation Modelling (SEM) Analysis

In this study, a structural model, which incorporated all of the variables that were assessed in the calculation model, is used to test the hypotheses.

Table 2: MODEL FIT SUMMARY

Model	NPAR	CMIN	Degrees of Freedom	P	CMIN/DF (χ^2/df)		
Default model	33	101.739	33	0	2.083		
Criteria	<3.000						
RMR, GFI							
Model	RMR	GFI	AGFI	RFI rho1	IFI Delta2	CFI	RMSEA
Default Model	0.079	0.935	0.871	0.897	0.904	0.928	0.073
Criteria	<0.100	>0.80					

Source: Researchers compilation.

The table above displays the fundamental model fit statistics. The chi-square/df (χ^2/df) is within the acceptable range of <3 (2.083). The goodness of fit (0.935) is higher than the attributes proposed. In the boundary estimation, the root mean square residual (RMR) is 0.79. The model thus has appropriate measures of fit.

Hypothesis Testing

H₁ There is a positive relationship between role stressors and inter-role conflict.

Table 3: COEFFICIENTS – H₁

Coefficients					
Model	Unstandardised Coefficients		Standardised Coefficients	T	Sig.
	B	Std. Error	Beta		
1	(Constant)	-8.13E-17	0.032	4.08	0
	Role Stressors	0.555	0.032	0.555	17.209

a. Dependent variable: inter-role conflict

Source: Researchers compilation.

The sig. values in the above table are < 0.05 for role stressors, which means that role stressors (WO and FO) impact inter-role conflict and there is a significant change in inter-role conflict due to role stressors.

Hence, the analysis shows that role stressors will significantly change inter-role conflict. With a 1% rise in role stress, inter-role conflict will rise by 0.555 (B value), indicating a positive relationship.

Accordingly, hypothesis (H1), which states that a positive relationship exists between role stressors and inter-role conflict, is supported.

Hypothesis Analysis Related to Individual Role Stressors

H_{1(a)} There is a positive relationship between work overload and inter-role conflict.

H_{1(b)} There is a positive relationship between family overload and inter-role conflict.

Table 4: COEFFICIENTS – H_{1(A)}

Coefficients						
Model	Unstandardised Coefficients		Standardised Coefficients	t	Sig.	
	B	Std. Error	Beta			
1	(Constant)	2.00E-16	0.029	2.79	0.005	
	Work Overload	0.078	0.038	0.078	2.036	0.042
	Family Overload	0.702	0.038	0.702	18.39	0

a. Dependent variable: inter-role conflict

Source: Researchers compilation.

The relationship between work overload and inter-role conflict (IRC) is positive and significant (beta = 0.078, $p = 0.042$). This indicates that increased work overload leads to a modest rise in IRC. The relationship between family overload and IRC is strongly positive and highly significant (beta = 0.702, $p < 0.001$). This suggests that family overload is the dominant factor contributing to IRC, with a substantial effect size.

The sig. value in the above table for work overload is 0.042, and for family overload it is 0.000, which is < 0.05 . The result indicates an impact of both work overload and family overload as role stressors (WO and FO) on inter-role conflict. Individual role stressors cause a significant change in inter-role conflict.

From the above analysis, a 1% rise in work overload will increase the inter-role conflict by 0.078 (B value), while a 1% rise in family overload will increase inter-role conflict by 0.702 (B value).

It is interesting to see that even though WO and FO have significant contributions, WO is less effective than FO. The B value for WO is 0.078, indicating that inter-role conflict is impacted more by WO and is less severely impacted by FO. The B value of FO is 0.702, indicating a strong and positive relationship between IRC and FO, thereby revealing the higher importance of FO in inter-role conflict compared to WO.

The above analysis shows that work overload and family overload have significant effects on inter-role conflict. When observed individually, work overload positively impacted inter-role conflict. However, family overload showed a stronger positive association than work overload.

H_{1(a)} There is a positive relationship between work overload and inter-role conflict – Supported.

H_{1(b)} There is a positive relationship between family overload and inter-role conflict – Supported.

Hypothesis Analysis Related to Moderation Variable

H2: Workplace social support has a negative moderating effect on the relationship between role stressors and inter-role conflict.

Table 5: COEFFICIENTS^A – H₂

Coefficients					
Model	Unstandardised Coefficients		Standardised Coefficients	T	Sig.
	B	Std. Error	Beta		
(Constant)	0.011	0.033		0.33	0.741
1 Role Stressors	0.536	0.033	0.536	16.055	0
ZRS X ZWS	-0.051	0.023	-0.073	-2.174	0.03

a. Dependent variable: inter-role conflict
Source: Researchers compilation.

The sig. value of the interaction term ZRoleStressors X ZWorkplaceSupport (ZRSXZWS) in the above table is 0.030, which is <0.05. Workplace support is hence a moderator variable that affects the relationship between independent variable role stressors and the dependent variable inter-role conflict.

The negative B-coefficient value for the interaction predictor (workplace support) indicates that workplace support negatively affects inter-role conflict; namely, workplace support provided by co-workers and supervisors reduces inter-role conflict.

The above analysis shows that workplace support (moderators) will significantly change inter-role conflict. The moderator variable workplace support will reduce the impact of inter-role conflict created by role stressors.

Accordingly, the hypothesis that workplace support negatively moderates the relationship between role stressors and inter-role conflict is supported.

Hypothesis Analysis Related to Individual Workplace Support Elements

- H_{2(a)} Supervisor support has a negative moderating effect on the relationship between work overload and inter-role conflict.
- H_{2(b)} Supervisor support has a negative moderating effect on the relationship between work overload and inter-role conflict.
- H_{2(c)} Co-worker support has a negative moderating effect on the relationship between family overload and inter-role conflict.
- H_{2(d)} Co-worker support has a negative moderating effect on the relationship between family overload and inter-role conflict.

Table 6: COEFFICIENTS – H_{2(A)}

Coefficients					
Model	Unstandardised Coefficients		Standardised Coefficients	T	Sig.
	B	Std. Error	Beta		
1 (Constant)	0.004	0.031		0.123	0.902
ZWOXZWPS_SS	-0.05	0.064	-0.072	-0.783	0.034
ZFOXZWPS_SS	0.086	0.067	0.104	1.273	0.203
ZFOXZWPS_CS	0.037	0.068	0.047	0.547	0.585
ZWOXZWPS_CS	-0.304	0.071	-0.422	-4.298	0
Work Overload (WO)	-0.128	0.041	-0.128	-3.139	0.002
Family Overload (FO)	-0.608	0.039	-0.608	-15.668	0

a. Dependent variable: inter-role conflict
Source: Researchers compilation.

Based on the results, Work Overload (WO), Family Overload (FO), the interaction terms Work Overload X Workplace Supervisor Support (ZWOXZWPS_SS,) and Work Overload X Workplace Co-worker Support ZWOXZWPS_CS have a significant relationship with inter-role conflict (p value < 0.05). The interaction terms Family Overload X Workplace Supervisor Support ZFOXZWPS_SS, Family Overload X Workplace Co-worker Support ZFOXZWPS_CS have a less significant relationship with inter-role conflict (p value > 0.05).

The analysis reveals that family overload (FO) is the most significant predictor of inter-role conflict (IRC), with a strong standardised coefficient (beta = -0.608, p < 0.001) and a large negative impact, followed by work overload (WO) (beta = -0.128, p = 0.002), which also contributes significantly to IRC. Co-worker

support in managing work overload (ZWOXZWPS_CS) shows a notable mitigating effect ($\beta = -0.422$, $p < 0.001$), indicating its importance. In contrast, supervisor and co-worker support in family overload contexts (ZFOXZWPS_SS, ZFOXZWPS_CS) do not significantly influence IRC ($p = 0.203$ and $p = 0.585$, respectively). These results emphasise that family responsibilities have a more critical role in exacerbating IRC compared to work-related stressors.

Moderation impact created by individual variables of workplace support

Supervisor Support (SS)

The sig. value in the above table for the interaction variables ZWOXZWPS_SS is 0.034, which is < 0.05 with a negative beta value (-0.050), and for ZFOXZWPS_SS it is 0.203 with a positive beta value (0.086), which is > 0.05 . The results indicated supervisory support has a significant impact on moderating the inter-role conflict created by work overload when compared with family overload. Supervisor support effectively reduces the inter-role conflict caused by work overload.

Therefore, the hypotheses that:

H_{2(a)} Supervisory support has a negative moderating effect on the relationship between work overload and inter-role conflict – is supported.

H_{2(b)} Supervisory support has a negative moderating effect on the relationship between family overload and inter-role conflict – is not supported.

Co-worker Support (CS)

The sig. values in the above table for the interaction variables ZFOXZWPS_CS and ZWOXZWPS_CS are 0.585 and 0.000, respectively.

The p value for the interaction variable ZFOXZWPS_CS (0.585) is > 0.05 , with a beta value of 0.037. This indicates that co-worker support does not moderate the inter-role conflict created by family overload.

This means that hypothesis H_{2(c)} co-worker support has a negative moderating effect on the relationship between family overload and inter-role conflict – is not supported.

The p-value for the interaction variable ZWOXZWPS_CS (0.000) is < 0.05 with a beta value of -0.304 , which means that co-worker support has an impact on moderating the inter-role conflict created by work overload. Co-worker support can thus be considered a moderator variable affecting the relationship between the independent variable, work overload, and the dependent variable (inter-role conflict). The negative B-coefficient value of -0.304 means that co-worker support negatively impacts the inter-role conflict created by work overload.

Hence, hypothesis H_{2(d)} co-worker support has a negative moderating effect on the relationship between work overload and inter-role conflict – is supported.

DISCUSSION

India has a unique culture and value system (Banerjee 2008). With the economy thriving and surging to new heights, more women traditionally engaged in family care are taking up full-time employment. The full-time employment of women leads to increased earnings for couples, contributing to economic growth and changed family dynamics (Gujan Mishra 2021). Earning couples joining the workforce bring new challenges, including work–life balance (N Sharma 2023). The study's findings highlight the extent to which the two important role stressors to which earning couples are exposed daily result in inter-role conflict, notably in the Indian context where cultural expectations and dual responsibilities amplify these challenges (P Kalliath, Kalliath, and V Singh 2011; Vashisht, Punj, and Vashisht 2022).

In the Indian context, the interplay of work–family balance and traditional gender roles creates unique challenges. Women in India often experience higher levels of work–family conflict due to entrenched societal norms that allocate a disproportionate share of household responsibilities to them. This imbalance significantly intensifies the burden of simultaneously managing household and professional responsibilities (Vijayalakshmi, Nirmala, and Subasree 2023) and affects well-being. Gender differences observed in Indian society also have an impact on work–family conflicts and affect job performance and well-being (Komal, Aastha, and Muskan 2013) and work–family stress negatively affects job satisfaction across genders (T. Singh, Singh, and Singh 2012).

Family-friendly policies adopted by organisations in India often fail to address the special challenges faced by women, causing increased stress and attrition rates (Vyas 2023). Social support, especially from the family, is emerging as a crucial moderating factor for alleviating the stress associated with work–family conflicts, and familial support enhances productivity and reduces stress among Indian working women (Kundra et al. 2023).

This exploratory study covered 676 professionals whose spouses are also working (earning couples) to understand the relationship between the work and family overloads they have experienced and their impact on inter-role conflict. The findings reveal that native cultural aspects like strong family centrality and traditional gender-specific roles, combined with work and family demands, create high role demands, leading to inter-role conflicts.

The coefficient analysis related to the relationship between role stressors (work overload and family overload) indicated that, with all other factors remaining constant, for every unit increase in role stressors, inter-role conflict increases by 0.555 units. The beta value 0.555 indicated a strong positive relationship, showing that greater role stress adds to inter-role conflict. While both work overload and family overload significantly predicted inter-role conflict, work overload has a weaker positive relationship (beta = 0.078) with inter-role conflict compared to family overload (beta = 0.702).

The above analysis confirms the relationship between role stressors and

inter-role conflicts. Role stressors have a significant and positive impact on inter-role conflict; and thus hypotheses H_1 , $H_{1(a)}$ and $H_{1(b)}$ are supported.

Data analysis with reference to the moderation effect of workplace social support variables in lowering the impact of inter-role conflict created by role stressors indicated that a one-unit increase in role stressors increases inter-role conflicts by 0.536 (with other factors being assumed to be constant). The beta value of the moderator variable workplace support (ZRSXZWS) is -0.073 . This value indicates a negative relationship and that a one-unit increase in the moderator variable decreases the impact of inter-role conflict by 0.0731 units, supporting Hypothesis 2.

When individual moderation aspects of supervisor support (SS) and co-worker variables in relation to reducing the role stressors' impact on inter-role conflict were tested, a significant impact created by supervisor support in moderating the inter-role conflict due to work overload (beta value -0.050) was found when compared with family overload (beta value 0.203) and the same was also found to be true in the case of co-worker support, i.e., supervisor support and co-worker support could not moderate the impact created by a family overload on inter-role conflict, both effectively moderated and negated by the impact created by the work-overload stressor on inter-role conflict based on the analysis, hypothesis $H_{2(a)}$ and $H_{2(d)}$ were supported and $H_{2(c)}$ and $H_{2(d)}$ were not supported.

CONCLUSION AND RECOMMENDATIONS

In line with its objectives, the study examined the relationship between role stressors (work overload and family overload) and inter-role conflict and the moderating influence of workplace social support on the relationship.

The findings concerning the relationship between role stressors (work overload and family overload) and inter-role conflict reveal that both work and family overloads impact inter-role conflict. The respondents agreed that the role stressors (WO and FO) are responsible for inter-role conflict.

While both role stressors contributed to inter-role conflict, it is worth noting that the respondents perceived a higher level of inter-role conflict due to family overload than work overload. These findings are contrary to research findings from the Western world (Parasuraman et al. 1996; Frone, Yardley, and Markel 1997) where respondents perceived higher work-family conflicts than family-work conflicts.

The acceptance of work overload is because the typical Indian employee puts extensive effort into their work, shows a greater sense of ownership towards work, and values their work more than their personal life. Indian workers strongly believe that the workplace is a ladder for future opportunities and the only means for financially securing the family (Somaiya 2010).

Family overload is considered to be an obstacle in discharging work responsibilities effectively. Additional family responsibilities, such as caring for elders, childcare, attending their children's academic activities, and other unplanned

family activities, often conflict with their work responsibilities. Work overload creates a smaller impact on inter-role conflict compared to family overload, which can be related to the fact that work interference with the family is almost accepted in Indian society, and the family system is not supposed to cause hindrances while performing work-related activities.

The higher level of inter-role conflict due to family overload can be associated with the collective culture found in India, which stresses strong family ties, communal decision-making, and shared responsibilities. As a culture, Indian women are expected to take care of domestic work and caregiving activities.

Those respondents who perceived a higher level of inter-role conflict due to family overload can be theoretically associated with cultural theories of collectivism and the theory of ecological systems. While cultural theories of collectivism examine how societal values prioritise group cohesion, interdependence, and collective well-being over individual autonomy and self-interest, collectivist cultures, like those in many Asian countries, including India, emphasise strong family ties, communal decision-making, and shared responsibilities. These values often shape individual behaviours, roles, and interpersonal dynamics. The theory explains how cultural norms (the macrosystem) and workplace–family interactions (the mesosystem) create role conflicts. For instance, in India cultural expectations of caregiving often lead to family overload, influenced by macrosystemic values and interactions on the microsystem level.

Ecological systems theory (Bronfenbrenner 1979) explains human development as being influenced by multiple environmental systems interacting with one another. Bronfenbrenner categorised these systems into five nested layers, highlighting the importance of immediate and broader environmental influences. Microsystems refer to the immediate environment where an individual interacts directly, such as the family, workplace or school. Mesosystems consider interactions between microsystems, such as how workplace demands interact with family responsibilities, influencing an individual's ability to manage their roles effectively. Exosystems include systems that indirectly influence an individual, like a spouse's workplace policies or community norms, which can exacerbate family or work overload. The macrosystem represents the overarching cultural, social and economic systems, such as collectivist cultural values in India that underscore familial obligations and societal expectations, and the chronosystem examines the dimension of time, accounting for changes over an individual's life or generational shifts in cultural or societal roles.

Both theories explain how cultural norms and workplace–family interactions create role conflicts. For instance, in India cultural expectations of caregiving often lead to family overload, influenced by macrosystemic values and interactions on the microsystem level, rather than work overload.

The observations concerning the impact created by workplace support in moderating the effect of role stressors on inter-role conflict reveal that workplace support effectively moderates and reduces the inter-role conflict arising

from both work and family overloads. However, the moderation impact created by individual aspects, i.e., supervisor support, co-worker support, and organisational policy support that constitute workplace support, is different.

A supervisor's support cannot moderate or reduce the impact of work or family overload on inter-role conflict. Both co-worker support and organisational policy support effectively moderated and reduced the inter-role conflict created by work overload but were not found to be effective in moderating family overload. The results concerning moderation effects may be attributed to the fact that the support offered by the supervisor and co-worker is more aligned with work-related aspects.

The above analysis allows the conclusion that the study was able to successfully explore and establish a relationship between role stressors and inter-role conflict. The study also successfully explored the moderating impact of workplace support in reducing inter-role conflict.

Using the COR theory model, the study provided insights into the complex and multifaceted interplay of role stressors (work and family overload) and inter-role conflict. The study results help to understand the dynamics of role stressors, moderating variables, and their impact on inter-role conflict. The results also emphasise the importance of workplace support systems like supervisor, co-worker, and organisational policy support in buffering the adverse effects of inter-role conflict caused by work and family overloads. Results of the study additionally provide critical inputs for developing various organisational interventions and policies that enhance employee well-being and productivity. Organisations can leverage the theoretical framework offered by this study to design support systems that reduce the negative impacts of role stressors and inter-role conflicts.

The findings of this study demonstrate the near generalisability of results to other developing nations like India. However, future research could explore gender-specific dynamics by using gender as a control variable or by modelling work-family stress and social support effects separately for men and women. In addition, there is a need to examine how external support systems, such as extended family and community networks, influence stress mitigation in the Indian sociocultural landscape.

Future research could also probe further into the issues of inter-role conflict among Indian earning couples by considering additional or different sets of moderating variables. Comparative studies could be carried out to determine the impact of inter-role conflict faced by earning couples in various industry segments, across various countries, and on various levels of management.

This research work could be developed further by correlating the study findings with other HR initiatives and processes like employee engagement, training, rewards, and recognition processes. While this study is cross-sectional, a longitudinal study could be performed in the future to ascertain the causal status of the variables examined. A joint family structure is still prevalent in India, and

thus a comparative study to determine the varying levels of inter-role conflict of earning couples in nuclear and joint family arrangements would be an interesting future area of study.

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INDIJSKI PAR Z DVEMA DOHODKOMA – STRESNI DEJAVNIKI ZARADI DRUŽBENIH VLOG, KONFLIKT VLOG IN MODERATORSKI UČINEK PODPORE SOCIALNEGA OKOLJA NA DELOVNEM MESTU

Povzetek. *Indijski pari z dvema dohodkoma zaradi pomanjkljivih virov podpore v družinskem in delovnem okolju doživljajo neravnovesje pri opravljanju svojih družinskih in delovnih vlog. V raziskavi smo razvili in preizkusili model raziskovanja moderatorskega učinka dveh virov podpore na delovnem mestu – podpora nadrejenega in podpora sodelavca – na konflikt med vlogama, s katerim se sooča indijski par z dvema dohodkoma. Zbrali in analizirali smo podatke 676 oseb, ki sestavljajo par z dvema dohodkoma iz 11 večjih indijskih mest, pri čemer smo vzorec pridobili z metodo snežne kepe. Kljub temu da k stresu zaradi družbenih vlog kot dejavnika pomembno prispevata tako preobremenjenost z delom kot preobremenjenost z družino, je zanimiva ugotovitev ta, da je učinek posameznih spremenljivk pri preobremenjenosti z delom na konflikt med vlogami manjši kot pri preobremenjenosti z družino. Čeprav se je pokazalo, da ima podpora na delovnem mestu moderatorski učinek na konflikt med vlogama, se je na ravni posameznih spremenljivk pokazalo, da ima podpora sodelavcev in nadrejenih manjši moderatorski učinek na konflikt med vlogami pri preobremenjenosti z delom v primerjavi z družino. Izpostavili smo praktične posledice študije, kar zadeva delo, in usmeritve za prihodnje raziskave.*

Ključne besede: *stresni dejavniki zaradi družbenih vlog, preobremenjenost z delom, preobremenjenost z družino, podpora nadrejenega, podpora sodelavcev, konflikt med vlogami, indijski par z dvema dohodkoma.*

INSIGHTS CONCERNING HOW STUDENTS VIEW THE IMPACT OF TECHNOLOGY IN LIFELONG LEARNING**

Abstract. Technology has transformed education into a lifelong journey on which learners' knowledge and adaptability is vital. Embracing technology enables learners to navigate a world of information, fostering continuous exploration and growth. This qualitative case study analyses reflective essays to explore the experiences of 15 Kosovo university students with technology in the context of lifelong learning. In addition, seven students were interviewed to gather more in-depth insights. Thematic analysis of the data revealed several key findings, including the influence of technology on approaches to lifelong learning, the challenges faced while using technology for learning, the skills and knowledge acquired through technology, differences in technology use among peers, and the future evolution of technology. Overall, the study helps to better understand how technology shapes lifelong learning and the implications it holds for the professional development of university students.

Keywords: *technology, lifelong learning, reflection, university students.*

INTRODUCTION

Continuous education during one's life is proving to be ever more essential, framing life paths as lifelong learning journeys in contemporary societies (Ule and Zidar 2011, 1414). Technology has a significant impact on lifetime learning because it changes the ways students learn throughout their lives (Candy 2004, 43–44; Jones and Issroff 2007, 248; Kahu and Nelson 2018, 59). The use of technology in lifelong learning, notably artificial intelligence and distance education, is emerging as a catalyst for change, breaking the confines of rote memorisation and routine tasks (Fidalgo et al. 2020). Technology encourages adaptable, varied, and lifelong learning opportunities, expanding education beyond traditional

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schooling. According to the American Institutes for Research (2015, 7), lifelong learning skills permit students to acquire essential knowledge and pursue various paths leading to college and career readiness and success. These skills provide the foundations for learning and working, broadly supporting student thinking, self-management, and social interaction, which in turn facilitates the pursuit of educational and career goals. According to Di Giacomo et al. (2018) and Adams (2007, 151), digital skills represent enhanced learning abilities where cognition and technology interact to model knowledge processes in ageing populations. While new generations, as digital natives, are tech-savvy and utilise improved learning capabilities, adults and older generations, despite not possessing native technological competence, are learning digital skills to improve their lives and age well in a digital world. The UNESCO's 2020 report states that the complexities of modern life call for adaptability, requiring populations to be resilient, open to change, and committed to lifelong learning. Factors such as increased mobility, population displacement, climate and technological change, threats to global health and democratic systems, and new economic patterns influence nearly every country in the world in various ways.

The present paper is an effort to explore how students view the educational use of technology and self-directed lifelong learning, pointing out the importance of students' insights for education practices and policymaking. While some research in this area can be found, namely, by Alt et al. (2021) there is a lack of understanding when it comes to students' views on the role of digital technology in facilitating self-directed, lifelong learning and how it influences their motivation, autonomy, learning outcomes and professional development. Specifically, the experiences of university students with digital technologies for education are related to their views and uses for supporting their self-directed lifelong learning in different learning settings. The paper thus seeks to fill this gap by directly engaging with students to obtain their views on the matter, identifying barriers confronted by students in accessing or being able to use digital technologies effectively, and showing opportunities for enhancing their learning through better technological support.

The study was guided by two research questions:

1. How do university students' experiences with digital technologies relate to their perceptions and use of these technologies to support their self-directed lifelong learning within formal, non-formal and informal learning environments?
2. Which implications are held by students' experiences with digital technology and self-directed lifelong learning for their professional development?

Lifelong learning and technology: enhancing self-directed learning

Nardin et al. (2010) relate lifelong learning to the use of technology. They define the concept of lifelong learning as life-wide learning whose success hinges on the potential held by distance education via computer-mediated communication. Educational resources and digital tools create an engaging classroom setting and make the teaching-learning process more compelling (Haleem et al. 2022). Morris and Rohs (2021) state that learners often lacked competence in using digital technologies for education and needed support in planning, reviewing and effectively harnessing them for self-directed learning. Lifelong learning empowers individuals who aim to develop themselves. Bolhuis (2003) claims that even though education embraces self-directed learning as one of the most important goals, its implementation involves tensions between school authority and its educational values and objectives. Self-directed learning is broadly defined as an individual's ability to manage, take responsibility for, and control their own learning process (Karataş 2017, 453; Karataş et al. 2021, 56).

According to the UNESCO Handbook (2020), lifelong learning encompasses all forms of learning, including formal, non-formal and informal modalities. The 1999 Lifelong Education Act assigns responsibility to all levels of government to promote lifelong learning, requiring the Ministry of Education to create comprehensive plans every 5 years to establish policy goals and provide lifelong learning opportunities to all citizens (UNESCO 2020). Monitoring lifelong learning opportunities not only helps countries to better address the needs of all individuals, especially those underserved by existing education systems, but also demonstrates a country's dedication to lifelong learning (Pryima et al. 2018, 4; UNESCO 2021). Approaches to monitoring and methodologies vary among nations. In Slovenia, for instance, a consultative body is tasked with monitoring and evaluating the country's annual plan for adult education, utilising data provided by seven ministries (UNESCO 2020).

The Education Strategy 2022–2026 of the Ministry of Education, Science, Technology and Innovation (MESTI) in Kosovo states that a strategic objective in support of lifelong learning is to harmonise education and vocational training with dynamic developments in technology and the labour market. According to MESTI (2022), actions to improve adult and lifelong education include accrediting institutions offering adult education, providing accelerated courses, developing training programmes for educators in this field, and enhancing the National Qualifications Authority's capacity to accredit adult education programmes. Although strategic documents exist, they lack specificity and clarity, and have not been effectively put into practice. At the same time, the lack of such policies and an articulated approach leave young people without access to quality-assured informal learning material and resources, causing unequal opportunities, a widening educational gap, and a lack of essential skills to evaluate and

exploit online learning devices. Structured support for self-directed learning not only fosters equity, but also helps learners develop the competencies they need for lifelong learning and critical thinking.

Impact of technology on lifelong learning: experiences and implications for professional development

Higher education institutions should incorporate lifelong learning skills into their educational goals to equip students for university learning and professional environments (Güven 2020, 11). As noted by Dorsett et al. (2010, 2), lifelong learning's importance has grown significantly, particularly its impact on individuals' employability. This means that even those who are currently employed must continuously improve or update their knowledge and skills to stay competitive in today's job market. Reflective practices are seen as valuable for adding to students' lifelong learning skills and their professional practice in higher education (Ryan 2011, 100). According to Alt et al. (2021, 2), "one active learning method designed to promote higher-order thinking skills is the reflective journals, also referred to as learning diaries/journals, or learning/response logs". Reflection plays a crucial role in the transformative integration of knowledge, skills and attitudes that defines learning in vocational settings (Alt et al. 2021; Baartman and de Bruijn 2011, 127). Facilitated opportunities for a structured reflection on their learning journey in a deep and insightful manner are missing. This outcome increases the need to understand how reflection can be used as a tool to enhance self-awareness, critical thinking and personal growth among university students.

An OECD report (2024) describes how in the realm of digital economies and societies a need is growing for specialist skills in information and communications technology (ICT), especially in low- and middle-income countries. Such demand is fuelled by the rapid expansion of global ICT industries, even in developing nations, with this trend being anticipated to continue. Further, there is considerable demand for core work skills, including empathy, creativity, collaboration, customer service, problem-solving, and the ability to learn, adapt and implement new methods and approaches. When combined with ICT skills, these core skills are highly valued and often lead to premium rewards in the job market.

According to Thwe and Kálmán's (2024, 410) systematic review of the literature, factors influencing lifelong learning include skills, competencies, tendencies, individual and organisational variables, external barriers, the professional learning environment, metacognition, and personality. Their review revealed research gaps, suggesting the further exploration of lifelong learning with variables such as new learning communities, advanced teaching techniques, learning styles, strategies, motivation, self-directed learning, personal learning environments, and educational technology.

In the contemporary era, education faces the challenge of preparing individuals for a society characterised by high mobility and driven by technology (Güven 2020, 4). The OECD's 2024 report stresses the need for immediate action to make sure people are equipped with the skills required to succeed in a rapidly changing world. Recent advancements in AI, including the widespread use of ChatGPT and similar generative AI technologies, show the speed of change. To assure that everyone can benefit from these trends, investments in agile and responsive skills systems are essential.

METHODOLOGY

Research design

This qualitative study employs a case study approach. Creswell (2017, 30) states that a case study allows for in-depth examination of a particular instance, situation or phenomenon within its real-life context. In this context, the study uses a case study design to delve deeply into the experiences of university students with technology in the context of lifelong learning with the aim to uncover rich and contextualised insights. The two qualitative approaches—reflective essays and semi-structured interviews—were selected because they complement each other: the reflective essays allowed participants to document the process of learning and personal growth they were experiencing, provided an individual level of insight, and answered the first research question, whereas the semi-structured interviews allowed a follow-up on those responses, providing flexibility to look at areas that seemed particularly important and ensure a more rounded understanding of the research questions.

Sample

Fifteen university students from the University of Prishtina (second-year Pedagogy students enrolled in the “Lifelong Learning” course) submitted reflective essays as part of their coursework. These reflective essays provide a rich source of data for understanding the students' experiences with technology. Moreover, out of the 15 students invited to participate, seven agreed to be interviewed. These students were selected for semi-structured interviews to gain deeper insights into their experiences (see Table 1). Each student is identified by a pseudonym to maintain anonymity. The table includes information on their gender, age, and years of experience with technology, providing a snapshot of the diverse backgrounds and technological proficiency levels among the participants.

Such a wide range of experiences with technology among the interviewees allows for a comprehensive exploration of how technology impacts their lifelong learning journeys.

Table 1: SAMPLE DEMOGRAPHICS

Name	Gender	Age	Experience with technology (in years)
Student 1	F	20	8
Student 2	F	20	6
Student 3	M	21	7
Student 4	F	20	10
Student 5	M	20	10
Student 6	F	21	6
Student 7	M	20	7

Source: Own data.

Instruments and procedures

The study utilises analysis of reflective essays and interviews to explore the experiences of university students with technology in the lifelong learning context. Clear instructions were provided to all students with respect to the reflective essays. The instructions outlined what was expected in terms of the content and format of their essays, ensuring consistency in the data collected. Students were assigned these tasks:

1. *Reflect on your experiences with integrating technology into traditional educational settings to support lifelong learning. Consider how technology has impacted your learning process and outcomes in these settings.*
2. *Describe how you have utilised technology in learning environments outside of traditional academic institutions. Reflect on the effectiveness of technology in facilitating your learning in these contexts.*
3. *Discuss your experiences with informal learning through technology. Reflect on how informal learning activities, supported by technology, have contributed to your personal and professional development.*

For the semi-structured interviews, students who had expressed a willingness to participate and engage in the discussion were selected. The interviews were conducted at a time and location convenient to the students, respecting their availability and assuring a comfortable environment for an open and honest conversation. Each interview lasted between 15 and 20 minutes.

Interview questions

1. How do you think technology has influenced your approach to lifelong learning?
2. Which challenges have you faced while using technology for learning, and how have you overcome them?
3. Can you discuss any specific skills or knowledge you have gained by using technology that you believe will benefit your future career?

4. Have you noticed any differences in how you and your peers employ technology for learning? If so, what do you think accounts for these differences?
5. How do you see technology evolving in the future, and what impact do you think this will have on lifelong learning?
6. Can you reflect on how your perceptions of technology and lifelong learning have changed over the course of your studies?

Data analysis

The analysis of reflective essays in the study employs a summative approach to qualitative content analysis. This method involves initially identifying and quantifying specific words or content in the text to gain insights into their contextual use. According to Potter and Levine-Donnerstein (1999, 271), this quantification is not intended to infer meaning but to explore usage patterns. Kon-dracki et al. (2002, 225) suggest that a summative approach goes beyond word counts to include latent content analysis. Latent content analysis, as described by Weber (1990, 9), involves examining underlying meanings and themes in a text.

For the interview data analysis, thematic analysis was undertaken to identify patterns and themes within the interview transcripts. The analysis process involved coding the data, categorising codes into themes, and interpreting the findings to acquire insights into the experiences of university students with technology in the context of lifelong learning.

RESULTS

Results From the Reflective Essays

Analysis of the reflective essays led to the identification of codes and descriptors for three items. These codes and descriptors capture the key themes and insights derived from students' reflections on integrating technology into traditional educational settings, utilising technology in non-academic environments, and engaging in informal learning through technology. In the analysis of the students' reflections, several key descriptors emerged regarding their experiences with technology in education. Mentioned by various students, these descriptors reveal the diverse ways in which technology is perceived to impact teaching, learning, and overall educational practices. For example, the descriptor "Set of predefined objectives" was mentioned by student S12. The descriptor "Incorporating technology into daily learning practices" was mentioned by student S11.

Integration of technology into traditional educational settings to support lifelong learning

The results shown in Table 3 (see the appendix) indicate that a structured curriculum and objectives were emphasised in the students' reflections. They stressed the importance of guided instruction and explanation, with references

made to predefined objectives, the integration of technology into daily learning practices, and the complementation of informal education. The use of technology was seen as advancing education and improving efficiency and effectiveness in teaching and learning processes. Students noted the increased productivity in classroom operations and the completion of predefined lessons and assessments within specified timeframes. They also mentioned the benefit of receiving instruction from instructors on the functionality of technology. In addition, students appreciated professors who incorporated more attractive activities into their teaching.

Utilisation of technology in learning environments outside of traditional academic institutions

The results given in Table 4 (see the appendix) show that students view technology as a valuable tool for their professional development. They highlighted the importance of flexible and accessible learning opportunities, such as online courses, workshops, seminars and Massive Open Online Courses (MOOCs). Students mentioned that these opportunities had helped them to develop new skills and improve existing ones linked to their profession. They also noted that technology had facilitated building professional relationships and connections, improving problem-solving skills, and obtaining certifications or qualifications. The students also appreciated the self-paced learning options, online platforms, blended learning approaches, and mobile learning opportunities for their professional development.

Informal learning through technology

The results point to the significance of informal learning through technology, emphasising self-directed and flexible learning approaches (see Table 4 in the appendix). Students appreciated the accessibility, flexibility and affordability of the informal learning opportunities facilitated by technology. They noted that individuals can learn at their own pace and convenience, leading to engaging and enjoyable learning experiences. Informal learning via technology was seen as a way to stay updated with new technologies and enhance one's professional skills and competencies.

Moreover, students mentioned that informal learning can occur anywhere, anytime, fostering a love for learning. They also noted that informal learning experiences complement formal education by providing additional knowledge and skills. Students reported having discovered new information and skills independently outside of a formal classroom setting. They mentioned having used online tutorials, such as those on YouTube, to acquire new skills applicable to professional settings.

Further, students stressed the role of technology in improving access to relevant resources and information, facilitating learning and skill development. They noted that informal learning through technology often occurs unintentionally,

by way of informal exploration or exposure to new ideas and concepts. Overall, students viewed informal learning through technology as a valuable and enriching experience that complements formal education.

Results from the interviews with students

The results of the interviews revealed several key themes: the influence of technology on lifelong learning approaches, challenges encountered while using technology for learning, skills and knowledge acquired through technology use, differences in technology use among peers, and the anticipated future evolution of technology in education (see Table 5 in the appendix).

Theme 1: Influence on students' approach to lifelong learning

Students described how technology has expanded their access to a wide range of resources and information, making it easier for them to explore new topics and deepen their understanding. *"Technology has opened up a world of information and resources that were previously inaccessible to me"* (Student 2). *"With technology, I have easily found and accessed a wide range of resources to deepen my understanding of various topics"* (Student 6).

Technology had enabled students to engage in self-directed learning, allowing them to pursue their interests at their own pace and convenience. Students outlined how technology enhances collaborative learning experiences by enabling them to connect and work with peers from diverse backgrounds. *"Technology empowers me to take control of my learning journey and pursue knowledge in areas that I'm passionate about"* (Student 3); *"Through technology, I have collaborated with classmates and peers from different parts of the world, which has enriched my learning experience"* (Student 1).

Students emphasised that technology provides access to various online resources and tools, permitting students to stay up to date in their field and adapt to new developments. This aspect of technology was crucial for helping them remain competitive and informed in an ever-evolving world. *"I can access online courses and tutorials that help me develop new skills and stay updated in my field"* (Student 2); *".... I have gained knowledge in the field of programming, I have learned and continue to learn words in foreign languages, and I receive advice on physical-health education and in other educational fields"* (Student 7). Students believe that technology adds to their career prospects by providing opportunities for continuous learning and growth. *"I believe that technology plays a key role in my professional development, helping me stay competitive in the job market"* (Student 4).

Theme 2: Challenges in using technology for learning

The challenges the students had faced while using technology for learning are multifaceted and impact their educational experiences. As shown in their statements, students encounter difficulties due to poor Internet connectivity

and compatibility issues between devices. *“A poor Internet connection has often hindered my ability to participate in online lectures and access course materials”* (Student 1). The abundance of information available online can be overwhelming for students, leading to challenges in identifying relevant and reliable sources: *“I often struggle to sift through the abundance of information to find what is most useful for my studies”* (Student 6).

Simultaneously, students express feeling overwhelmed by the rapid pace of technological advancements and sometimes lack the digital skills needed to navigate online learning environments or use specific software. *“There are times when I lack the necessary digital skills to effectively navigate online learning environments or use specific software”* (Student 4). Students express significant concerns about data privacy and security while using online platforms for learning, citing the risk of data breaches and cyberattacks. Student 4 stated: *“I’m concerned about the privacy of my personal data when using online platforms for learning”*. This statement reveals the students’ growing awareness and apprehension concerning the protection of their personal information in digital environments.

Theme 3: Skills and knowledge gained

Students stated that technology has enabled them to acquire specific technical skills that are directly applicable to their professional field. *“I’ve become proficient at using software like Photoshop, Canva and Excel, which are valuable skills in my field”* (Student 2); *“Knowledge on how to research and find reliable and accurate information in the shortest possible time”* (Student 5).

The results show that technology use has enhanced the students’ ability to critically evaluate information, indicating an improvement in their information literacy skills. *“I’ve learned to critically evaluate online sources to ensure the information I use is reliable and accurate”* (Student 4). On the other side, the results suggest that technology use has contributed to the students’ development of adaptability and problem-solving skills, yet has also heightened the students’ awareness of fake news and the importance of verifying information: *“I’ve learned to be more discerning about the news I consume online, verifying information before accepting it as true”* (Student 2).

Non-formal education, like online courses and webinars, provides students with valuable opportunities for lifelong learning. Such resources offer a wealth of knowledge and skills that extend beyond traditional classroom settings, enabling individuals to continue their education and personal development at their own pace and convenience. *“Through online courses and webinars, I’ve discovered a wealth of resources for lifelong learning, allowing me to continue my education beyond the classroom”* (Student 6).

The results show that technology has expanded the students’ access to resources for lifelong learning. They suggest that technology can facilitate continuous learning and personal growth outside formal education settings.

Theme 4: Differences in technology use among peers

The varying comfort levels with technology among peers underscore the wide spectrum of proficiency and confidence in utilising digital tools. This diversity can significantly influence how students engage with technology and their overall learning experiences. Students state the diversity in comfort levels with technology among peers. *“Some of my peers are very comfortable using technology, while others struggle with even basic tasks like sending emails”* (Student 1); *“Some of my colleagues encounter difficulties when it comes to composing their essays using Microsoft Word”* (Student 6). *“... they are not very interested in using technology, which they see as something complex”* (Student 7).

Students revealed they have different preferred learning styles, with some favouring visual and interactive methods. This suggests that technology can cater to diverse learning preferences and enhance student engagement and understanding. *“I prefer visual and interactive learning, so I find technology-enhanced resources more engaging and effective”* (Student 4); *“Some of my peers find it challenging to learn from online materials, preferring more traditional methods of instruction”* (Student 3).

Theme 5: Future evolution of technology

Students anticipate that the future evolution of technology in education will include the integration of artificial intelligence (AI) into education systems. They believe that AI will revolutionise teaching and learning processes by personalising learning experiences, providing immediate feedback, and adapting to individual student needs. *“I believe AI will revolutionise education by personalising learning for each student, making education more effective and engaging”* (Student 1). Students believe that as AI advances, *“professors will increasingly rely on tools like ChatGPT for tasks such as lecture preparation and other educational activities”* (Student 3).

DISCUSSION

The results from the reflective essays provide valuable insights into how university students' experiences with digital technologies relate to their perceptions and use of these technologies to support self-directed lifelong learning within formal, non-formal and informal learning environments. In a formal setting, the emphasis on a structured curriculum and objectives suggests that students value clear guidance and direction in their learning process, which directly influences self-directed learning by providing a framework for setting goals, selecting resources, and evaluating progress. A study by Faloye and Faniran (2023, 103) revealed that aligning technology integration practices with the expectations and objectives of policies and curricula led to enhanced support for teaching and learning in classrooms.

The focus on flexible and accessible learning opportunities through non-formal learning underscores students' recognition of the convenience and efficacy

of online courses, workshops and seminars. This reflects a larger trend towards lifelong learning whereby individuals strive for the ongoing development and enhancement of their professional skills. Paudel (2021, 71) reported in his study that the interviewed students expressed a readiness to enrol in online courses in the future, a sentiment echoed by Horváth et al. (2022, 10) who described their students' view of online platforms as efficient, along with an inability to envision their learning experience without them.

The importance of informal learning through technology underscores the value students place on self-directed and flexible learning approaches. This form of learning not only allows individuals to learn at their own pace but also fosters a love for learning by making it engaging and enjoyable. It additionally enables individuals to stay updated with new technologies and add to their professional skills and competencies. Ankiewicz (2020, 942) noted that technology plays a crucial role in addressing the diverse needs of students given their varied academic backgrounds and learning styles. Chisango and Marongwe (2021, 155) highlighted the confidence and empowerment students gain through self-directed learning, permitting them to make informed decisions about their studies. Likewise, Backfisch et al. (2021) discovered that students derive enjoyment from utilising technology, particularly for information retrieval and learning activities. They also found that this technology use fosters the development of digital skills essential for the workplace and active participation in the digital realm. Overall, these results suggest that encouraging students to reflect on their personal interests and career plans can enhance their engagement with digital technologies, making learning more enjoyable and meaningful. When students see how these technologies can support their individual goals, they are more likely to take ownership of their learning journey, leading to a more proactive and motivated approach to lifelong learning.

The findings from the interviews reveal understandings of student experiences with regard to digital technologies and self-directed lifelong learning that are linked to professional development. Students stated that technology has enabled them to acquire specific technical skills, enhance their ability to critically evaluate information, improve their information literacy skills, adaptability, and problem-solving skills while also making them more aware of fake news. Non-formal education through online courses and webinars provides valuable opportunities for lifelong learning, offering a wealth of resources that extend beyond traditional classroom settings and facilitate continuous personal and professional growth. This is vital since non-formal learning is generally self-guided, giving students the freedom to decide on their level of engagement and depending on their intrinsic motivation (Johnson and Majewska 2022). Advances in technology have a profound impact on students' ability to apply their learning to assess their standing in the global workforce (Zhang et al. 2022). Collaborative efforts, such as virtual universities and consortia, aim to share resources, improve educational services, and explore new markets while also preparing

individuals for the job market by offering relevant lifelong learning opportunities (Laal 2011, 472; Sherifi and Nikoçeviq-Kurti 2023, 544).

CONCLUSION

The results show that technology has a great impact on lifelong learning by enabling learners to access information, learn by themselves, and collaborate. While technology facilitates career skills development, it brings several challenges like technical problems, information overload, and inequity of access. Students must learn to use technology and secure their information. Technology supports the development of technical skills, problem-solving, and flexibility. Nevertheless, differences exist among the students in relation to comfort levels and access. Personalised learning in the future may also be enabled by AI and virtual reality. Although initially sceptical, the students now understand that technology is a core aspect of lifelong learning and stressed how collaboration can yield inclusive, innovative learning environments.

Accordingly, it is recommended that universities invest in technological infrastructure and embrace emerging technologies while providing professional development for teacher educators. Also emphasised is the importance of promoting collaboration and innovation, enhancing accessibility, supporting lifelong learning, and engaging with industry partners. In addition, universities should prioritise data privacy and security, encourage research and development, and continuously evaluate and adapt their approaches. A key limitation of this study is the challenge of achieving data saturation due to the small number of participants. Still, the focus was on capturing in-depth insights rather than broad generalisability. To add to the generalisability of the findings, future research should include a larger and more diverse sample of students from various academic disciplines and institutions. Conducting comparative studies across different universities and educational systems would also help to understand how contextual factors influence the integration of technology in lifelong learning.

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Appendix 1

Table 2: ITEM, CATEGORIES AND DESCRIPTORS DERIVED FROM THE REFLECTIVE ESSAYS

ITEM	CATEGORY	DESCRIPTORS
Integration of technology into traditional educational settings to support lifelong learning	A structured curriculum and objectives	"A set of predefined objectives" (S12) "Incorporating technology into daily learning practices" (S11) "Complementing informal education" (S2) "Advancing education through technology" (S3) "Improving efficiency" and "effectiveness in teaching and learning processes" (S2, S15) "Classroom operations; productivity has increased" (S9, S11)
	Guided instruction and explanation	"A predefined set of lessons and assessments to be completed within a few days or weeks" (S1) "Being told by an instructor what something does or how it works" (S5) "More attractive activities by professors" (S6, S8, S10)

Source: Own data.

Table 3: ITEM, CATEGORIES AND DESCRIPTORS DERIVED FROM THE REFLECTIVE ESSAYS

ITEM	CATEGORY	DESCRIPTORS
Utilisation of technology in learning environments outside of traditional academic institutions	Professional development	"Online courses", "workshops", "seminars", MOOC (S1, S3, S7, S10) "Developing new skills" (S2, S5, S11, S13, S15) "Improving existing skills related to profession" (S2, S6, S11, S14, S15) "Building professional relationships and connections" (S1, S2, S4, S7)
	Flexible and accessible learning opportunities	"Improving problem-solving skills" (S10, S12, S15) "Certifications" or "qualifications" (S2, S5, S7) "Self-paced Learning" (S5, S7, S9) "Online Platforms" (S1, S4, S14, S15) "Blended Learning" (S2, S7, S10, S12) "Mobile Learning" (S15)

Source: Own data.

Table 4: ITEM, CATEGORIES AND DESCRIPTORS DERIVED FROM THE REFLECTIVE ESSAYS

ITEM	CATEGORY	DESCRIPTORS
Informal learning through technology	Self-directed and flexible learning	“Learning that is self-directed”, “accessible”, “flexible”, and “affordable” (S1, S3, S5, S9, S10) “Individuals learn at their own pace” and “convenience” (S2, S7, S9, S11, S13) “Learning through technology is engaging”, “enjoyable” (S1, S2, S5, S7, S10, S15) “Can occur anywhere, anytime”, “fostering a love for learning” (S5, S7, S9, S10, S13)
	Informal and spontaneous learning opportunities	“Staying updated with new technologies”, “enhancing professional skills and competencies” (S2, S7, S8) “Enhancing formal education with additional knowledge and skills gained through informal learning experiences” (S5) “Discovering new information and skills independently”, “outside of a formal classroom setting” (S14, S15) “Using online tutorials, like those on YouTube”, “to acquire new skills that are applicable in professional settings” (S2, S4, S7) “Using technology to access information and resources”, “enhancing informal learning experiences without replacing them” (S8, S10, S12, S13) Improving access to relevant resources and information through technology, facilitating learning and skill development (S14, S15) “Learning that occurs unintentionally”, “often through informal exploration or exposure to new ideas and concepts” (S11, S13)

Source: Own data.

Table 5: THEMES AND CODES DERIVED FROM THE INTERVIEWS WITH STUDENTS

THEMES	CODES
“Influence on students’ approach to lifelong learning	Increased access to resources and information Facilitation of self-directed learning Enhancement of a collaborative learning experience Ongoing skill development and knowledge enhancement Enhancement of career prospects and professional development
Challenges in using technology for learning	Technical issues (connectivity, device compatibility) Information overload Digital literacy and skills gaps Data privacy and security costs The cost of acquiring and maintaining technology Access to technology
Skills and knowledge gained	Technical skills; proficiency in using specific software or tools Information literacy; evaluating online sources Adaptability and problem-solving skills Facts/fake news Knowledge on resources for LLL
Differences in technology use among peers	Varying comfort levels with technology Differences in preferred learning styles Variation in access to technology resources
Future evolution of technology	Integration of AI into education Shift towards personalised and adaptive learning technologies More interactive and immersive learning experiences, making learning more engaging and effective Greater accessibility to learning resources

Source: Own data.

VPOGLEDI V MNENJA ŠTUDENTOV GLEDE VPLIVA TEHNOLOGIJE NA VSEŽIVLJENJSKO UČENJE

Povzetek. Tehnologija je spremenila izobraževanje v vseživljenjsko pot, kjer sta znanje in prilagodljivost učencev ključnega pomena. Sprejemanje tehnologije omogoča učečim se, da se orientirajo v svetu informacij in spodbuja nenehno raziskovanje in rast. V pričujoči kvalitativni študiji primera analiziramo refleksivne eseje z namenom raziskati izkušnje 15 študentov s Kosova s tehnologijo v kontekstu vseživljenjskega učenja. Poleg tega smo intervjuvali sedem študentov, da bi pridobili še bolj poglobljen vpogled v njihova mnenja. Tematska analiza podatkov je razkrila več ključnih ugotovitev, vključno z vplivom tehnologije na pristope k vseživljenjskemu učenju, izzivi, s katerimi so se študenti soočali pri uporabi tehnologije za učenje, spretnostmi in znanjem, pridobljenimi s pomočjo tehnologije, medvrstniškimi razlikami v uporabi tehnologije in prihodnjim razvojem tehnologije. Študija na splošno pomaga bolje razumeti, kako tehnologija oblikuje vseživljenjsko učenje in kakšne posledice ima za strokovni razvoj univerzitetnih študentov.

Ključne besede: tehnologija, vseživljenjsko učenje, refleksija, univerzitetni študenti.

Tjaša POTOČNIK*

A DYADIC APPROACH TO ADDRESSING THE UNMET NEEDS OF CAREGIVING DYADS: ANALYSIS OF THE INCLUSIVENESS OF THE SLOVENIAN LONG TERM CARE ACT**1

Abstract. *Caregiving is a dyadic relationship consisting of the person who receives and the person who provides care. In order to prevent needs among them going unmet, long-term care policy should adequately address the needs of both dyad members and thus holistically approach the issue of unmet needs within caregiving dyads. The article analyses the inclusiveness of informal caregivers and hence a dyadic perspective to caregiving in the Long-Term Care (LTC) Act (ZdOsk-1) in Slovenia. The LTC Act is shown to have focused on care receivers and, except for the right to a caregiver family member, fails to recognise the dyadic nature of caregiving.*

Keywords: *long-term care, caregiving-dyad, unmet needs, long-term care policy.*

INTRODUCTION

Informal care is vital for sustaining long-term care systems across Europe (Spasova et al. 2018; Zigante 2018), especially in unsupported familialist welfare states like Slovenia (Filipovič Hrast et al. 2020) in which older adults in need of care depend heavily on the informal care provided mostly by their family members, relatives, friends and neighbours. Yet, long-term care policies often fail to adequately support informal (family) caregivers, increasing the likelihood of greater unmet needs being present among them. In this article, the definition of caregiving as a dyadic relationship is followed, stressing the interdependency of caregiver and care receiver. An individual member of the dyad does not exist in isolation, but is influenced by the actions, emotions and characteristics of the

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other (Lyons et al. 2002; Revenson et al. 2016). Care receivers on one hand often struggle with the loss of independence and in turn increased dependence on others (formal/informal caregivers), frequently reporting feelings of shame and guilt – the latter especially when they are unable to reciprocate for the care they are receiving (e.g., in situations of immobility and extensive ADL needs) (Lyons et al. 2002; Bredewolt et al. 2020). On the other hand, the provision of care entails a specific cost for caregivers as well, notably in terms of time, participation in other non-care-related activities (e.g., family relationships, labour market participation, hobbies), and in physical, mental and emotional well-being (see Daly and Lewis 2000; Schulz 2008; Bouget et al. 2017; Antonsdottir et al. 2022). How this cost is experienced by caregiving dyads is contingent upon the availability and allocation of the resources available to them and their capabilities to transform these resources into (valued) functionings (Sen 1993; Schultz 2012). LTC policy is a vital resource for caregiving dyads aimed at supporting those in need of care and thus preventing care needs from going unmet. However, the extent to which caregivers are recognised and included in these policies varies among European welfare states (Courtin et al. 2014). Poorly designed policies that do not support both members of the dyad might cause unmet care needs to become more prevalent among caregiving dyads (Kröger 2022).

UNMET NEEDS FROM A DYADIC PERSPECTIVE

In past decades, numerous studies have examined the caregiving relationship and the exchange of support within caregiving dyads. Sociologists have (among others) examined these dynamics through theoretical frameworks of social exchange theory (e.g., Raschick and Ingersoll-Dayton 2004), social capital theory (e.g., Barrett, Hale, and Butler 2014) and intergenerational solidarity theory (e.g., Rodrigues et al. 2022). The topic has also been frequently studied by psychologists who have approached it via various theories, including theories of interdependency (e.g., Karademas 2021; Ferraris et al. 2022) and dyadic coping (e.g. developmental-contextual model of couples coping with chronic illness (Berg and Upchurch 2007)). When studying the outcomes of care provision or the presence of unmet needs, the majority of studies focus on either care receivers (see Vlachantoni et al. 2011; Hlebec et al. 2016; Kröger 2022) or caregivers (see Kuluski et al. 2018; Clemmensen 2020; Liu et al. 2020). Still, in the past decade studies using a dyadic approach – taking the outcomes and unmet needs of both members of the dyad into account, have been gaining attention (Revenson 2016; Pristavec 2019; Karademas 2021; Ferraris 2022; Antonsdottir 2023). These studies emphasise the contextual embeddedness of the dyad, its influence on both dyad members² and the fact that the outcomes of individual dyad members

² For example, living in a rural area with limited access to formal care services might hold consequences for care receivers as they might not receive sufficient amount or adequate care, as well as for their caregivers, who often need to cover the gap left by formal care services.

are often similar (Rand, Forder and Malley 2017). In a recent study, Antonsdottir et al. (2023) found that greater unmet care needs of care partners (caregivers) were related to worse health and well-being outcomes for both members of the caregiving dyad (Antonsdottir et al. 2023), stressing the intertwined nature of a caregiving relationship. A dyadic approach in LTC policy analysis focuses on the caregiving dyad as a unit, capturing the mutual influence of each member's experiences – for example, how informal caregivers' coping strategies influence care receivers' well-being and vice versa (Revenson et al. 2016, 26–27).

Although extensive literature and definitions related to the concept of unmet needs can be found (Williams et al. 1997; Vlachantoni et al. 2011; Freedman and Spillman 2014), Isaacs and Neville's definition was among the first to include both members of the caregiving dyad, defining unmet needs as situations “*when an individual receives insufficient care to fulfill his/her basic requirements for food, warmth, cleanliness and security at a level at which he would have provided them for himself had he been fit to do so, or when care was provided only at a cost of undue strain to the relatives*” (Isaacs and Neville 1976, 81). To effectively meet the needs of caregiving dyads, it is essential that LTC policy measures include the needs of caregivers as research shows that unmet caregiver needs can lead to a caregiver burden which, in turn, adds to the likelihood of care receivers having unmet needs (Schulz et al. 2012; Brimblecombe 2023). This creates a vicious cycle of unmet needs, revealing the importance of a dyadic perspective when it comes to unmet needs in the design of LTC policy (and interventions).

UNMET NEEDS AMONG CAREGIVING DYADS IN SLOVENIA

The Slovenian LTC regime can be defined as unsupported familialism (Filipovič Hrast, Hlebec and Rakar 2020) because family support is crucial in both informal and formal LTC. The latter is reflected in the obligatory out-of-the-pocket contribution for formal care services and the use of (housing) assets to cover the costs of formal LTC services in cases where families cannot afford them (Mandič 2012). At the beginning of the transition, Slovenia established LTC policies for older people on the tradition of institutional care, while it was only after the transition was completed that community care started to develop (Hlebec and Rakar 2017). However, research shows that formal LTC services in Slovenia are financially inaccessible, especially for older adults with high care needs, low incomes, and for those living in rural areas (Hlebec, Majcen and Srakar 2016; Hlebec and Filipovič Hrast 2016), who often report having unmet needs (Kadi et al. 2021). Inequalities in the availability, accessibility and affordability of home care services in Slovenia are often stressed as one of the main reasons for unmet needs among older adults and their community-dwelling caregivers in Slovenia (Kadi et al. 2021). In addition, the poor financial situation of older people importantly affects the caregiving arrangements of dyads. This is especially the case within adult child–parent dyads because adult children are

legally obliged³ to cover the gap in cases when older adults cannot afford to pay the full cost of formal LTC services (Hlebec and Rakar 2017). The lack of state support and complexity of caregiving is reflected in unmet needs of informal caregivers who frequently report the need to take a (longer) break from caregiving, the higher availability of home care services, and more frequent visits from community nurses. At the same time, many informal caregivers lack support from their informal network (relatives, friends), community care services (e.g., day care centres), concrete information related to care provision as well as faster procedures concerning access to institutional care and financial help and support (Hvalič Touzery 2007). Over one-third of family caregivers express their desire to return to the life they had prior to assuming the informal caregiving duties (Hvalič Touzery 2009). This might point to the lack of choice in becoming an informal caregiver or that the provision of care is time-consuming and might incur serious costs with respect to caregivers' other, non-care-related obligations (e.g., family obligations, health, hobbies, employment).

In a recent study on caregiving dyads in Slovenia, Potočnik et al. (*forthcoming*) find that the insufficiency and inadequacy of formal care services and lack of financial resources among caregiving dyads exacerbates the inequalities among them, particularly affecting caregiving dyads with low socioeconomic status. This is concerning because inequalities tend to accumulate over the life course, often becoming more pronounced in old age and could potentially trap dyads in a cycle of disadvantage (Dannefer 2020; Rodrigues and Ilinca 2021).

It is hence important to study whether long-term care policy recognises informal caregivers as co-clients (Twigg 1989; Revenson 2016) and thus support the idea that both dyad members should be adequately supported in order to prevent unmet (care) needs and maintain a certain level of well-being. This is crucial to prevent inequality and the accumulation of disadvantages among caregiving dyads.

METHODS

Analysis

For decades, the Slovenian LTC system was fragmented and addressed by different laws (e.g., as part of the Social Assistance Act (2007)⁴, Health Care and Health Insurance Act (1992)⁵ and Pension and Disability Insurance Act (2012)⁶. Nonetheless, the adoption of the LTC Act in 2021⁷ marked a pivotal moment by

³ While payment exemptions are available, in such cases the (housing) assets of the care receivers are utilised to cover the financial shortfall (Mandič 2012).

⁴ Social Assistance Act, Official Gazette of the Republic of Slovenia, No. 3/2007.

⁵ Health Care and Health Insurance Act, Official Gazette of the Republic of Slovenia, No. 9/1992.

⁶ Pension and Disability Insurance Act, Official Gazette of the Republic of Slovenia, No. 96/2012.

⁷ The Long-term Care Act in Slovenia was adopted in 2021, but due to changes in the government the Act was amended in 2023 and its implementation postponed from 1 January 2023 to 1 January 2024, especially due to financing issues.

bringing LTC under a single piece of legislation for the first time in the country's history. The LTC Act regulates the rights and obligations of providers, individuals insured for LTC, the tasks of the state and municipalities, compulsory insurance for LTC, and funding resources for LTC. The act upholds the public interest and aims to ensure equal access, availability, quality of LTC services as well as the right to live independently and autonomously for all LTC beneficiaries following the principles of universality, solidarity, equality, and the prohibition of discrimination.

The inclusiveness of caregivers as targets for support in the Slovenian LTC Act (2023) was studied in order to determine whether informal caregivers and thus the dyadic nature of caregiving is recognised within it. Following the framework of the inclusiveness of social rights (Classen and Clegg 2007; Dobrotić and Blum 2019), in the new LTC Act (2023) three dimensions of inclusiveness of social rights are in focus: *the entitlement principle* (to whom the rights are granted), *eligibility criteria* (conditions in which the rights are granted) and *benefit scope* (what an individual can obtain through a specific right and how generous it is). All three dimensions were examined in relation to the following research question:

1. *To what extent are the unmet needs of informal caregivers, and thereby the dyadic nature of caregiving, recognised in the Slovenian LTC Act? When and in which conditions are informal caregivers entitled to LTC rights under the LTC Act?*

The goal of the policy analysis is to study the extent to which caregivers are included in the LTC Act (2023) and to identify potential risks and social inequalities that might be created by inclusiveness criteria.

RESULTS – THE INCLUSIVENESS OF THE SLOVENIAN LTC ACT

Entitlement principles

In order for an individual to be entitled to the rights under the LTC Act (2023), they must have been insured for LTC for at least 24 months in the past 36 months before claiming the rights; have a permanent or temporary residence in the Republic of Slovenia⁸ and, based on the needs assessment, be categorised in one of five LTC needs categories according to the needs assessment scale. Further, an individual should not be in receipt of any comparable service (e.g., example assistance and attendance allowance; institutional care under the Social Assistance Act⁹ (2007) or personal assistance (except where the personal

⁸ For individuals with international protection, classified in one of the five LTC needs categories according to the needs assessment scale, criteria related to the duration of insurance and residency in the Republic of Slovenia do not apply.

⁹ The Long Term Care Act, Official Gazette of the Republic of Slovenia, No. 84/2023.

assistance services provided are not comparable to those under the LTC Act¹⁰).

The new LTC Act (2023) states that beneficiaries are entitled to two types of rights: *monetary* and *non-monetary rights*. *Non-monetary rights* include the entitlement of care receivers to services provided through the public network of formal care providers. This includes home care services (starting 1 July 2025) as well as institutional care in nursing homes or day-care centres (starting 1 December 2025). Moreover, since 1 January 2024 care receivers are also entitled to the right to a Caregiver Family Member (CFM). In contrast to informal caregiver, who is defined as “an individual who provides (usually) unpaid care to someone with a chronic illness, disability or other long lasting health or care need, outside a professional or formal framework” (Eurocarers 2024), CFM is a formalised type of care for which caregivers must meet specific eligibility criteria and which constitutes a form of “employment”, distinguishing it from informal or unpaid care. In addition to *non-monetary rights*, care receivers are entitled to *monetary rights*. Care receivers are entitled to a cash benefit, the amount of which depends on the level of the care receiver’s needs. The benefit ranges from EUR 89 for those in the lowest (first) category of need to EUR 491 for those in the highest (fifth) category. Coming into effect on 1 December 2025, a cash benefit will be provided to care receivers who will not utilise their entitlement to non-monetary rights or in the case of the unavailability or insufficiency of non-monetary rights to meet the needs of care receivers. In the latter situation, a cash benefit will be given as a temporary alternative until the non-monetary rights become available. Alongside monetary and non-monetary rights, the majority of care receivers (except those in institutional care) are entitled to E-Care services as well as services aimed at strengthening and maintaining their independence (starting 1 July 2025).

The dyadic nature of caregiving makes it crucial to acknowledge that care receivers’ entitlement to services and cash benefit can have indirect impacts on their informal caregivers. While on one hand a cash benefit may alleviate the financial strain on caregivers, on the other it might also foster caregivers becoming dependent on care receivers. Similarly, the provision of home care services, for example, may help relieve caregivers of some of their responsibilities. However, inadequate or inaccessible services can produce the opposite effect (see Brimblecombe 2023). Still, given that the focus of this paper is the inclusiveness of LTC policy, only those rights where the effect on the caregiver is direct and where both members of the dyad are included are focused on. In the analysed LTC Act

¹⁰ In Slovenia, there is a two-tier system of long-term care provision – one tier represents the LTC Act and the other the Personal Assistance Act (Official Gazette of the Republic of Slovenia, nos. 10/17 and 31/18). The rights under the Personal Assistance Act can be claimed by a person aged 18–64 years, with a long-term physical, mental, intellectual or sensory impairment, needing support with leading an independent personal and family life, integration into the social environment, education and employment, for at least 30 hours per week. The eligible person is granted the right to one or two personal assistants (according to the level of needs), enabling them greater independence, activity and equal participation in society.

(2023), solely the right to CFM applies a dyadic approach (see Table 1) and the analysis of the LTC Act (2023) therefore concentrates on the entitlement, eligibility criteria, and scope of benefits related to the right to a CFM.

THE RIGHT TO A CAREGIVER FAMILY MEMBER

Entitlement

The LTC Act (2023) establishes the institute of a caregiver family member (CFM) as one type of non-monetary LTC rights for individuals in the 4th or 5th category of care needs. This type of LTC is provided within the household by a close family member based on the request of the dyad. Caregivers are entitled to this right through the care receiver to whom the right is granted. To receive this benefit, both the care receiver and the caregiver must submit an application acknowledging the vital role of both dyad members.

Eligibility Criteria

Apart from a needs assessment, the caregiver must meet specific eligibility criteria to qualify as a CFM. Caregivers must co-reside with the care receiver(s), be a family member(s)¹¹ of the care receiver(s) and need to exit the labour market when taking on the role of CFM. There is an option to remain in employment, but only part-time if there are two caregivers for one care receiver who both work part-time in paid employment and part-time as a CFM. Since labour market activity is a necessary precondition and one of the eligibility criteria to become a CFM, retired caregivers are excluded and cannot be formally recognised as CFMs. This is problematic since retired caregivers represent more than half of all informal caregivers in Slovenia (Nagode and Srakar 2015) and due to the low pensions and poor financial situation of older adults in Slovenia are already in a disadvantaged position. The fact that retired caregivers are ineligible to become a CFM could be seen as discriminatory and might exacerbate inequalities in old age, especially given that in Slovenia older individuals, notably women (who are also disproportionately represented among informal caregivers), are more exposed to the risk of poverty (Leskošek 2017).

Further, the eligibility criteria for CFM are also related to the needs and living arrangements of the care receivers. Only caregivers providing care to care receivers with extensive care needs (care receivers in 4th or 5th category according to the needs assessment scale, where 5th is the highest category) and those co-residing with care receivers are eligible to become a CFM. Simultaneously, caregivers must be psychologically and physically fit, have no legal convictions,

¹¹ According to the LTC Act, the following qualify as a family member of the insured person: the spouse or cohabiting partner, the daughter or son, the daughter or son of the spouse or cohabiting partner, the parents (father and mother, or the spouse or cohabiting partner of the father or mother), the brother or sister, the grandson or granddaughter, and second-degree relatives in either the direct or collateral line.

and need to successfully complete basic training for a CFM. These eligibility criteria exclude all family members who do not provide care to the care receiver in the first, second and third category of needs as well as those who do not co-reside in the same household with the care receiver. That is interesting as living alone is a major risk factor for unmet needs (Kroger 2022). It also does not sufficiently address the needs of caregiving dyads in Slovenia since only about 40% of caregiving dyads live in the same household (Baji et al. 2019, 58). The outcome is that the majority of informal caregivers in Slovenia do not satisfy the precondition to become a CFM or that, in order to claim the benefit, they should move in with the care receiver and (partly) exit the labour market as well. Yet, this might not always be a viable option, nor is it necessarily a preferred choice for informal caregivers.

Benefit Scope (duration, coverage)

CFMs are expected to take up related duties if they are to keep the benefits. They must provide the care according to the personal plan (created by the care receiver and CFM with support from the LTC coordinator at the Centre for Social Work), report to their coordinators monthly, take a refresher course in the amount of 20 hours every 3 years and inform the coordinator and other important stakeholders (e.g., doctors) should the health status of the care receiver change. In addition, CFMs are entitled to compensation for lost earnings at the rate of 1.2 times the minimum wage when caring for one and 1.8 times the minimum wage when caring for two care receivers with high care needs living in the same household. As this compensation is above the minimum wage, it could significantly impact gender inequality in caregiving, especially the position of women, when negotiating care arrangements within the family (Rodrigues et al. 2022). However, leaving the labour market in order to provide care would probably be more appealing for those employed in low-paid occupations as the carer allowance could improve their financial situation. Studies have shown that in cases where siblings are providing informal care daughters provide more intensive care and provide care regardless of the circumstances (Šadl and Hlebec 2018). Accordingly, the above minimum wage compensation for the CFM and the possibility to share the responsibility (with both siblings being employed part-time at their own job and part-time as a CFM) might contribute to a more equal division of informal care between siblings, particularly when the compensation would not impact their financial situation negatively. Besides the compensation for lost income, CFMs are also entitled to 21 days of paid leave along with paid social security benefits and access to training (basic training in the amount of 30 hours and a refresher course in the amount of 20 hours). Even though this set of measures marks a step forward in recognising caregivers needs as it covers their requirements for information, training and respite care, it is only granted to a minority group of caregivers (those who have formalised their role and become CFMs), overlooking the needs of caregiving dyads where informal caregivers

do not decide to formalise their status or do not meet the eligibility criteria to become a CFM.

CONCLUSION

The analysis of the Slovenian LTC Act revealed that while most of the Act focuses on care receivers the inclusiveness of caregivers (and thus approaching caregiving from the dyadic perspective) is limited to the right to CFM. In relation to CFM, the LTC Act acknowledges the dyadic nature of caregiving, treating the caregiver and care receiver as a unit from submission of the application through the caregiving process. Support measures are made available not just to care recipients but also to the CFMs themselves, acknowledging their needs for training, compensation, respite care and annual leave. Providing compensation to CFMs that is above the minimum wage might on one hand encourage more informal caregivers who satisfy the eligibility criteria to leave the labour market and become a CFM, but it is very important to acknowledge that providing care to a care receiver in the 4th or 5th category of needs usually means more than a typical 8-hour work schedule (often 24/7). Even though leaving the labour market might negatively affect a CFM's well-being (see Zigante 2018), especially if there are no other formal or informal resources the caregiving dyad can rely on, the opportunity to become a CFM might resolve the role conflict and enable caregivers to focus solely on providing care. Still, leaving employment to provide care may pose long-term risks for informal caregivers as the LTC Act does not (apart from being entitled to compensation for 1 month following the death of the care receiver) offer a protective mechanism that would enable CFMs the return to the labour market after the cessation of care. Apart from the institute of CFM, the LTC Act does not cover the needs of informal caregivers who do not decide to formalise their status, thus overseeing the heterogeneity and support needs of a large share of informal caregivers in Slovenia, e.g., those who do not meet the eligibility criteria to become a CFM (e.g., retired caregivers; caregivers not residing with care receivers), and those who do decide not to formalise their caregiver status (e.g., those who wish to remain in the labour market).

As the trend in LTC policy is for the refamilisation of care, and the burden to provide care is increasingly pushed on to informal caregivers (notably women), LTC policies should develop a support system that recognises, supports and enables informal caregivers to provide good quality care irrespective of whether they choose to formalise their status or not. To overcome inequalities among caregiving dyads, the LTC Act should strive to increase the capabilities of informal caregivers to provide care of good quality and, on top of the right to a CFM, provide them with access to a comprehensive system of support services that would not have as strict eligibility criteria, especially in relation to the co-residency, labour-market status and familial relationship to the care receiver. With regard to the informal caregiving projections, the eligibility criteria to become a CFM seem overly restrictive as shifts in family dynamics and

labour market patterns in contemporary society indicate a decline in the number of family members capable or willing to provide care, as well as those who co-reside with care recipients. Extending the rights to information, training and counselling to all caregivers, not only caregivers who formalise their status, and including caregivers as targets within the LTC Act could thus hold important implications for caregiving dyads in Slovenia, improving the quality of LTC care provided by informal caregivers, enhancing the well-being of caregiving dyads, and lowering the risk of unmet needs within the dyads.

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APPENDIX

Table 1: OVERVIEW OF LONG-TERM CARE RIGHTS AND ASSESSMENT OF DYADIC PERSPECTIVE TO CAREGIVING

	Right	Entitle- ment principle	Eligibility criteria	Benefit Scope	Dyadic perspective
Non-monetary rights	The right to institutional LTC	Care receiver	Care needs assessment	Depending on the category (up to: 20,40,60,80,110 hours per month for the 1 st to 5 th category, respectively)	No
	The right to daily LTC in an institution	Care receiver	Care needs assessment	Depending on the category (up to: 7,14, 21, 27,37 hours per month (for the 1 st to 5 th category, respectively)	No
	The right to home care	Care receiver	Care needs assessment	Depending on the category (up to: 7,14, 21, 27,37 hours per month (for the 1 st to 5 th category, respectively)	No
	The right to a CFM	Care receiver	A family member, psychophysically fit, has passed training, co-residence with the caregiver, (partly) left the labour market Care receiver and Caregivers	Care allowance: 1.2 or 1.8 x the minimum wage Right to training, Right to respite care Included in insurance	Yes
Additional rights	Services to strengthen independence	Care receiver	Care needs assessment	Depending on the category (up to: 12, 24, 48, 24 hours per year (for the 1 st to 5 th category, respectively)	No
	E-care	Care receiver	Care receivers under the LTC Act + individuals older than 80 on the request of the primary doctor or Centre for Social Work	EUR 25 per month per care receiver; a one-time contribution in the amount of EUR 50 for setting up the equipment	No
Monetary right	Cash-for-care	Care receiver	Care receivers who are entitled to LTC and do not receive any other type of LTC	Depends on the needs assessment, but up to EUR 89, EUR 179, EUR 268, EUR 357, EUR 491 (for the 1 st to 5 th category, respectively)	No

Source: Long Term Care Act, Official Gazette of the Republic of Slovenia, No. 84/2023

DIADNI PRISTOP PRI PROUČEVANJU NEZADOVOLJENIH POTREB ZNOTRAJ OSKRBOVALNE DIADE: ANALIZA SLOVENSKEGA ZAKONA O DOLGOTRAJNI OSKRBI

Povzetek. *Oskrba je diadni odnos, ki vključuje osebo, ki oskrbo prejema, in osebo, ki oskrbo zagotavlja. Da bi preprečili nastanek nezadovoljenih potreb med njima, bi morala politika dolgotrajne oskrbe ustrezno obravnavati potrebe obeh članov diade in tako celostno pristopiti k reševanju vprašanja nezadovoljenih potreb znotraj oskrbovalne diade. V članku analiziram vključenost neformalnih oskrbovalcev ter s tem diadnega pristopa k oskrbi v Zakonu o dolgotrajni oskrbi (ZdOsk-1) v Sloveniji. Ugotavljam, da je Zakon o dolgotrajni oskrbi (ZdOsk-1) osredotočen na prejemnike oskrbe in – razen v primeru pravice do oskrbovalca družinskega člana – ne priznava diadne narave oskrbe.*

Ključni pojmi: *dolgotrajna oskrba, oskrbovalna diada, nezadovoljene potrebe, politika dolgotrajne oskrbe.*

Mitja ŽAGAR*

PERCEPCIJE PRIPADNIKOV DRUŽBENIH MANJŠIN O LEGITIMNOSTI KRIZNEGA UPRAVLJANJA MED PANDEMIJO COVIDA-19: PREDSTAVITEV REZULTATOV TERENSKEGA RAZISKOVANJA**1

Povzetek. Ob kratki predstavitvi pregleda literature, konceptualnega in metodološkega okvira članek predstavlja prve ugotovitve in rezultate terenskega raziskovanja percepcij in stališč pripadnikov družbenih manjšin, zlasti narodnih/etničnih/jezikovnih manjšin in drugih specifičnih skupnosti o pandemiji covid-19, krizi in kriznem upravljanju med pandemijo z vidika legitimnosti kriznega upravljanja in ukrepov, njihovega vpliva na človekove pravice in svoboščine ter uresničevanje načela nediskriminacije, na situacijo, položaj, pravice, varstvo, vključevanje in integracijo manjšin. Terenska raziskava z uporabo odprtih globinskih intervjujev v sosednjih državah Avstriji, Hrvaški, Italiji, Madžarski in Sloveniji je bila izvedena (v okviru raziskovalnih projektov ARRS/ARIS in Obzorja Evrope) med poletjem 2021 in junijem 2024.

Ključni pojmi: *pandemija covid-19; krizno upravljanje in ukrepi; družbene manjšine in njihovi pripadniki; narodne/etnične/jezikovne manjšine; legitimnost kriznega upravljanja.*

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** Izvirni znanstveni članek.
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¹ Članek predstavlja rezultate raziskovalnega programa Manjšinske in etnične študije ter slovensko narodno vprašanje (P5-0081) in temeljnega raziskovalnega projekta Politična participacija narodnih manjšin in njihovih pripadnikov: primerjalna študija politične participacije slovenskih skupnosti v sosednjih državah Republike Slovenije (J5-3117), ki ju financira ARRS/ARIS, ter projekta LEGITMULTE o legitimnem kriznem upravljanju v večnivojskih sistemih, ki ga financirata Evropska unija (Horizon Europe Programme Call HORIZON-CL2-2021-DEMOCRACY-91, GA No. 101051550) in švicarski državni sekretariat za izobraževanje, raziskovanje in inovacije (Swiss State Secretariat for Education, Research and Innovation – SERI).

UVOD

Tematike, povezane z virusom SARS-CoV-2, pandemijo covida-19 in upravljanjem te (globalne) krize, so v obdobju 2020–2023 prevladovala med novicami, objavami in komentarji v množičnih in spletnih medijih ter med strokovnimi in znanstvenimi objavami v medicini in naravoslovju, pa tudi v tehniki, družboslovju in humanistiki. Pandemija in krizno upravljanje sta vplivala na vse posameznike, skupine, skupnosti, okolja in družbe ter njihovo življenje na vseh ravneh (od lokalnih skupnosti do globalne ravni), pa tudi na vsa področja življenja, med katerimi zaradi njihovega vpliva na življenje in dostopa do njih v času pandemije lahko posebej navedemo zdravje (vključno s problematiko cepljenja), zdravstvo, šolstvo in druge javne službe. To potrjujejo raziskave, opravljene v Sloveniji (npr. NIJZ 2020–2023), in objave, ki iz teh in drugih raziskav izhajajo. (npr. Gabrovec et al. 2022; Šorgo et al. 2022; Šorgo et al. 2022(a); Žmavc et al. 2022) Nacionalni, evropski in mednarodni raziskovalni projekti ter strokovne in znanstvene objave pozornost namenjajo tudi specifičnim okoliščinam, vplivu, pomenu in posledicam krize in kriznega upravljanja na različne družbene manjšine, vključno z narodnimi, etničnimi in jezikovnimi manjšinami (npr. Žagar 2020; 2021; 2023a; 2023b). Ni pa objav o percepcijah in stališčih pripadnikov teh manjšin o pandemiji covida-19, krizi in kriznem upravljanju ter njihovih posledicah za manjšinske skupnosti in njihove pripadnike, ki predstavljajo njihova stališča o legitimnosti kriznega upravljanja na podlagi terenskega raziskovanja v različnih državah.

Ta članek vsaj delno zapolnjuje praznino. Predstavlja rezultate terenskega raziskovanja v okviru temeljnega raziskovalnega projekta ARRS/ARIS »Politična participacija narodnih manjšin in njihovih pripadnikov: primerjalna študija politične participacije slovenskih skupnosti v sosednjih državah Republike Slovenije« (J5-3117)² in prve rezultate terenskega raziskovanja percepcij in stališč pripadnikov različnih družbenih manjšin Delovnega sklopa 4 (DS4/WP4) o legitimnem večnivojskem kriznem upravljanju s perspektive človekovih pravic, manjšin in nediskriminacije, ki ga koordinira Inštitut za narodnostna vprašanja (INV) v okviru projekta Obzorja Evrope LEGITMULT o legitimnem kriznem upravljanju v večnivojskih sistemih.³ V okviru obeh projektov je bilo v obdobju od poletja 2021 do junija 2024 opravljenih več neformalnih razgovorov in 58 (odprtih) globinskih intervjujev s pripadniki različnih družbenih manjšin v Avstriji, Italiji in Sloveniji ter na Hrvaškem in Madžarskem, na katerih temelji ta članek.⁴ Čeprav v predlogu temeljnega raziskovalnega projekta, pripravljenem pred

² Glej, <http://www.inv.si/Dokumenti/dokumenti.aspx?iddoc=1009&idmenu1=19&lang=slo>.

³ Glej, LEGITMULT – Legitimate crisis governance in multilevel systems, a project funded by the European Union under Horizon Europe Programme Call HORIZON-CL2-2021-DEMOCRACY-91, GA No. 101051550 and the Swiss State Secretariat for Education, Research and Innovation (SERI). <https://legitimult.eu/>.

⁴ Intervjuje so opravili sodelavci Inštituta za narodnostna vprašanja dr. Romana Bešter, dr. Danijel Grafenauer, dr. Boris Jesih, prof. dr. Matjaž Klemenčič, dr. Janez Pirc in dr. Barbara Riman, sodelavca Slovenskega raziskovalnega inštituta (SLORI) iz Trsta dr. Devan Jagodic in dr. Zaira Vidau, sodelavec Slovenskega znanstvenega inštituta (SZI) iz Celovca dr. Valentin Sima, sodelavci Fakultete za politične

pandemijo covida-19, pandemija, z njo povezana kriza in krizno upravljanje niso omenjeni, je že prvi intervjuju pokazal, da bodo te tematike zaradi njihovih posledic ter vpliva na življenje in položaj slovenskih manjšin v sosednjih državah pomembne in vedno znova omenjene vsebine odgovorov intervjuvancev, izvojenih predstavnikov teh manjšin. Zato so bila vprašanja o teh temah vključena med vprašanja za intervjuje in zastavljena vsem dvajsetim intervjuvancem. Na začetku terenskega raziskovanja DS4 v okviru projekta LEGITIMULT je bilo šestnajst intervjuvancev, ki smo jih intervjuvali v okviru temeljnega raziskovalnega projekta iz Avstrije in Italije, vključenih med prve intervjuvance evropskega projekta. Z njimi sta bila opravljena oba intervjuja. Kot ostali intervjuvanci za projekt LEGITIMULT so skladno s pristopom in metodo »snežne kepe« tudi oni predlagali možne dodatne intervjuvance iz svoje manjšine in drugih manjšinskih skupnosti iz Avstrije, Hrvaške, Italije in Slovenije. Intervjuji v okviru DS4 bodo potekali do pomladi 2025, zato se njihovo število postopoma povečuje. Poleg pripadnikov slovenske manjšine so skladno s ciljnim populacijami, opredeljenimi v predlogu projekta, med intervjuvanci na Hrvaškem še pripadniki italijanske, madžarske, romske, slovaške in srbske manjšine (večinoma predstavniki manjšin na lokalni, županijski in nacionalni ravni ter funkcionarji manjšinskih organizacij), pripadniki skupnosti LGBTIQ+ ter predstavniki državnih institucij, lokalne in regionalne samouprave ter društev, ki sodelujejo s temi skupnostmi. V Italiji so med intervjuvanci poleg pripadnikov slovenske manjšine pripadniki nemške manjšine in obmejni prebivalci na južnem Tirolskem, načrtovani pa so intervjuji z migranti in prosilci za azil. V Sloveniji so intervjuvanci pripadniki italijanske in madžarske narodne manjšine, romske skupnosti in nekaterih priseljenjskih skupnosti, ki so aktivni znotraj svojih skupnosti, ter predstavniki državnih institucij, lokalne samouprave in društev, ki s temi skupnostmi ter prosilci za azil in begunci delajo in sodelujejo. Za vse intervjuvance velja, da so poznavalci tematike in/ali strokovnjaki. Na Hrvaškem in v Sloveniji ni mogoče opraviti intervjujev o percepcijah krize, povezane s covidom-19, in kriznega upravljanja v teh državah z migranti in prosilci za azil, saj se migranti v teh – zanje tranzitnih – državah praviloma zadržujejo le kratek čas (nekaj dni, tednov ali mesecev), preden se odpravijo naprej. Zato so skoraj vsi migranti in prosilci za azil, ki so v času krize bili v omenjenih državah, državi že zapustili.

V okviru projekta LEGITIMULT so bile posamezne manjšinske in druge specifične skupine in skupnosti v posamezni državi v vzorec vključene skladno s predlogom projekta. Ker se projekt posebej osredotoča na legitimnost kriznega upravljanja v večnivojskih sistemih, so v vzorec izbranih držav vključene federacija (Avstrija), dve regionalizirani državi z različno stopnjo decentralizacije (Hrvaška in Italija) in centralizirana država z enostopenjsko lokalno samoupravo (Slovenija).

znanosti Univerze v Zagrebu (FPZ SZG) prof. dr. Ružica Jakešević, prof. dr. Đana Luša, prof. dr. Siniša Tatalović in prof. dr. Marta Zorko ter sodelavki Inštituta za primerjalni federalizem Evropske raziskovalne akademije (EURAC Research) iz Bolzana/Bozna dr. Elisabeth Alber in Martina Gianola.

Cilj predstavljenega terenskega raziskovanja je ugotoviti percepcije in stališča pripadnikov različnih družbenih manjšin (in specifičnih skupnosti) ter oseb (praviloma strokovnjakov), ki s temi skupnostmi (so)delujejo, o pandemiji covida-19, krizi in kriznem upravljanju med pandemijo z vidika legitimnosti kriznega upravljanja in ukrepov, njihovega vpliva na človekove pravice in svoboščine, na situacijo, položaj, pravice, varstvo, vključevanje in integracijo manjšin in njihovih pripadnikov. Ta članek preverja domnevi, ki ju lahko opredelimo kot kompleksni (delovni) hipotezi, da: (1) strategije, procesi, politike in ukrepi kriznega upravljanja v pluralnih in raznolikih družbah vplivajo na vse v teh okoljih, a praviloma bolj kot ostalo populacijo prizadenejo različne manjšine in marginalizirane skupnosti/skupine ter njihove pripadnike; (2) ustrezna, pravočasna in celovita krizna komunikacija tudi v jeziku manjšin ter formalno in dejansko sodelovanje (participacija) ali vsaj simbolično vključevanje manjšin in njihovih pripadnikov (predvsem njihovih formalnih/neformalnih predstavnikov) v oblikovanje, sprejemanje in izvajanje procesov kriznega upravljanja, strategij, politik in ukrepov izboljšajo legitimnost in učinkovitost kriznega upravljanja.

KONCEPTUALNI OKVIR, KRATEK PREGLED LITERATURE IN METODOLOŠKI PRISTOP

Kompleksne, dinamične, notranje pluralne in raznolike družbe, lokalne skupnosti in druge ravni lokalne samouprave, regije in federalne enote v federacijah, države in njihove (mednarodne) integracije, pa tudi mednarodna skupnost so kompleksni in dinamični (družbeni) procesi. Mednarodna skupnost je skupnost držav, temeljnih subjektov mednarodnega prava, odnosov in sodelovanja. Države kot specifične oblike družbenega organiziranja ter sisteme urejanja in upravljanja družbenih odnosov in procesov znotraj njihovih meja opredeljujemo kot temeljne enote družboslovnega proučevanja in primerjav. V mednarodni skupnosti so države med seboj povezane in soodvisne, zato jih v raziskovanju le pogojno lahko obravnavamo kot neodvisne spremenljivke. To velja tudi za največje, najmočnejše in najvplivnejše države, ki predstavljajo globalne ali regionalne (vele)sile. Da to drži, je potrdila tudi pandemija covida-19.

Organiziranje, urejanje in upravljanje v sodobnih družbah in državah so zapleteni dinamični večnivojski procesi, ki so lahko uspešni, če v njih uspešno in usklajeno delujejo in sodelujejo vse relevantne ravni organiziranja, odločanja in upravljanja. Kot je potrdila kriza, povezana s pandemijo covida-19, to velja tudi za krizno upravljanje. Zato pri raziskovanju percepcij in stališč pripadnikov družbenih manjšin o uspešnosti in legitimnosti kriznega upravljanja v času pandemije covida-19 v njihovem okolju posebno pozornost namenjamo njihovim interpretacijam vloge, vpliva, sodelovanja in uspešnosti posameznih ravni oblasti, ki so v kriznem upravljanju sodelovale. Pri tem nas posebej zanima, kako dojemajo in ocenjujejo posledice in vpliv kriznega upravljanja in kriznih ukrepov na položaj, pravice, vključevanje in integracijo njihovih skupnosti ter na uveljavljanje načela nediskriminacije.

Že takoj na začetku pandemije covida-19 so se pojavile znanstvene objave o virusu SARS-CoV-2, bolezni covid-19 in pandemiji covida-19 zlasti v naravoslovju in medicini; njihovo število je hitro naraščalo (npr. *Nature*; *Science*; *The Lancet*; *Wiley Online Library*; *WoS*). Pandemija covida-19 in z njo povezano krizno upravljanje sta korenito spremenila življenje ljudi in družb globalno in v slehernem lokalnem okolju. Upošteva njun (zlasti družbeni in ekonomski) vpliv, odmevnost in posledice ne preseneča, da so se s temi temami takoj začeli ukvarjati raziskovalci iz praktično vseh ved, disciplin in področij. Zaradi ogromnega števila in obsega strokovnih in znanstvenih objav o virusu SARS-CoV-2, pandemiji covida-19, z njo povezanimi krizami in kriznem upravljanju se ta pregled literature osredotoča na nekaj temeljnih tem, konceptov in kontekstov, ki so izhodišča za razumevanje vpliva in posledic kriznega upravljanja za različne družbene manjšine, pravice in varstvo manjšin, njihovo situacijo in položaj, vključevanje, participacijo in integracije ter za razumevanje in interpretacije percepcij in stališč pripadnikov teh skupnosti, ki jih proučujeta predstavljena projekta. Med temi temami so:

- legitimnost (npr. Beetham 2012; Buchanan 2002; Caby & Frehen 2021; De Fine Licht et al. 2014; Esaiasson et al. 2012; Jackson et al. 2012);
- pristopi, koncepti, strategije, politike in ukrepi kriznega upravljanja nasploh in v času pandemije covida-19 (npr. Ansel et al. 2010; Christensen et al. 2016; Christensen & Ma 2021; Rodríguez et al. 2018);
- vloge vej oblasti in zlasti zakonodaje v procesih kriznega upravljanja (npr. Bolleyer & Salát 2021; Chaplin 2020; Petrov 2020); – demokracija, vključevanje, integracija in participacija državljanov ter njihove percepcije o kriznem upravljanju, njegovih vplivih in posledicah (npr. Alsan et al. 2020/2023; Bohle et al. 2022; Cronert 2022; Edgell et al. 2021; Engler et al. 2021; Gidengil et al. 2022; Guasti & Bustikova 2022; Heinzel & Liese 2021; Lowande & Rogowski 2021; Lozano et al. 2021; Maerz et al. 2020; Mouter et al. 2021; Rump & Zwiener-Collins 2021; Stasavage 2020).

Pregled literature se, upošteva cilje, zasnovo in tematike navedenih raziskovalnih projektov ter izvedenega terenskega raziskovanja, osredini na vprašanja sorazmernosti in legitimnosti kriznega upravljanja in posameznih ukrepov, človekovih pravic, položaja, pravic in varstva različnih manjšin ter njihovega vključevanja in integracije, enakosti, enakopravnosti ter uresničevanje (načela in politik) nediskriminacije. Z vidika (družbenih) manjšin in njihovih pripadnikov, njihovega vključevanja in integracije ter posledic, ki so jih imeli krizno upravljanje in ukrepi na njihovo življenje, vključevanje in integracijo so pomembni zlasti represivni in omejevalni ukrepi, kot so omejitve in začasni suspenzi pravic, omejitve gibanja, zaprtja družbe (*lockdowns*), lokalnih in državnih mej, zapiranje šol in (dolgotrajnejše) šolanje na daljavo, pa tudi omejen dostop do zdravstvenih in drugih javnih storitev, o katerih so poročali mediji. (npr. 24ur.com; BBC News; CNBC News; DW; MMC itd.) Mediji in komentatorji so ocenjevali, da tovrstni ukrepi

izrazito nesorazmerno prizadenejo (družbene) manjšine in njihove pripadnike ter zlasti marginalizirane posameznike in skupine na ekonomskem in socialnem dnu, ki so že sicer v večji meri izključeni. Vendar tovrstna medijska poročila in komentarji ter javno izražanje nezadovoljstva (tudi množični protesti) niso bistveno vplivali na procese kriznega upravljanja in na (zlasti izvršilne) oblasti v različnih okoljih, ki so bile ključne pri oblikovanju, sprejemanju in uresničevanju kriznih strategij, politik in ukrepov. Oblasti, ki so sprejemale krizne politike in odločitve, so svoje ravnanje in izključevanje drugih akterjev in javnosti iz procesov odločanja pojasnjevale in upravičevale z nujnostjo in kritičnostjo krizne situacije. Poudarjale so, da izjemne razmere terjajo izjemno in takojšnje ukrepanje, da bi lahko preprečili najhujše posledice. Tako so odgovarjale kritikom, ki so – pogosto upravičeno – trdili, da vsaj posamezni sprejeti omejevalni in represivni krizni ukrepi in posegi v človekove pravice, kot so bili suspenz posameznih človekovih pravic, zaprtja in omejevanje gibanja, niso bili sorazmerni. Oblasti so zatrjevale, da zaradi nujnosti ukrepanja ni bilo časa za širše razprave in posvetovanja, zlasti pa ne za dolgotrajne, negotove in morda neučinkovite vključujoče demokratične procese. Tudi v primerih, ko so kasneje sodišča ugotovila nezakonitost in neustavnost posameznih (zlasti represivnih) politik in ukrepov,⁵ so oblasti in odločevalci, ki so te odločitve sprejemali in uresničevali, vztrajali pri svojih pojasnilih in dodali, da bi v podobnih situacijah ravnali enako. Menijo, da je bilo njihovo omejevanje demokracije, vključevanja in človekovih pravic potrebno in vredno cene. Pri tem so se sklicevali na izkušnje »vojne proti terorizmu«, ki so pokazale, da so ljudje v zameno za obljube o boljši varnosti in zaščiti, čeprav so te lažne, pripravljeni sprejeti začasne omejitve človekovih pravic in (temeljnih) svoboščin. Še več, pokazalo se je, da je »molčeča« večina pripravljena tovrstne omejitve sprejemati tudi, če te postanejo stalne ali vsaj zelo dolgotrajne. (Žagar 2020; 2023a; 2023b)

Med prvimi znanstvenimi objavami o pandemiji covida-19, relevantnimi z gledišča narodnih in drugih družbenih manjšin ter njihovih pripadnikov, omenjamo 85. tematsko številko revije *Razprave in gradivo* (2020) z enajstimi članki, ki obravnavajo neposreden vpliv pandemije na različna področja življenja narodnih manjšin in prve posledice pandemije, ki jih občutijo manjšinske skupnosti, obsežno znanstveno monografijo *Svet je postal drugačen: Vpliv covida-19 na etnične manjšine in obmejni prostor v Sloveniji in sosednjih državah*, ki sta jo uredili Katalin Munda Hirnök in Sonja Novak-Lukanovič (2021), ter študijo o vplivu in posledicah pandemije covida-19 na jezikovne manjšine in mejne skupnosti na južnem Tirolskem (Alber et al. 2021).

⁵ Npr., ko je Ustavno sodišče Republike Slovenije (2021) presoјalo ustavnost 2. in 3. točke prvega odstavka 39. člena Zakona o nalezljivih boleznih (ZNB), je ugotovilo, da določbe niso skladne z drugim odstavkom 32. člena in tretjim odstavkom 42. člena Ustave RS, vendar je zaradi zavarovanja zdravja in življenja ljudi odločilo, da do odprave neskladja te določbe lahko uporabljajo. Hkrati je ugotovilo, da tudi odloki Vlade, sprejeti na podlagi omenjenih zakonskih določb, niso skladni z ustavo, zato se razveljavijo (Odločba Ustavnega sodišča št. U-I-79/20 z dne 13. 5. 2021). Podobno je italijansko ustavno sodišče razveljavilo pomembne dele posebnega zakona o upravljanju pandemije covida-19, ki ga je sprejel deželni parlament južne Tirolske.

Poročilo hrvaške varuvinje človekovih pravic o stanju človekovih pravic in enakosti v državi leta 2021 (Pučka pravobraniteljica 2022a) ugotavlja, da so bile kot v drugih državah tudi na Hrvaškem človekove pravice in (temeljne) svoboščine, vključno s pravicami manjšin, med prvimi žrtvami kriz in kriznega upravljanja. Njena priporočila za boljšo odpornost na prihodnje krize, ki temeljijo na ocenah vpliva pandemije covida-19 na človekove pravice in enakost (Pučka pravobraniteljica 2022b), potrjujejo takšen zaključek. Sprejemanja in uveljavljanja restriktivnih, represivnih in pogosto nesorazmernih kriznih ukrepov, omejitev in (začasnega!?) suspenza človekovih pravic in svoboščin, ki, kot ugotavljajo sodišča, pomenijo kršitev človekovih pravic in demokratičnih načel, ne moremo šteti za legitimno in demokratično krizno upravljanje (Huffstetler et al. 2021; Žagar 2021).

Pandemija covida-19 je razkrila in poudarila obstoječe neenakosti, kot so pogosto dolgotrajne socialne, ekonomske, etnične in rasne neenakosti v sodobnih družbah. Hkrati je ustvarila nove neenakosti (Katikireddi et al. 2021; Platt & Warwick 2020). Že sicer ekonomsko in socialno prikrajšani posamezniki, med katerimi so člani etničnih, rasnih in drugih manjšin, vključno z migranti, begunci in drugimi marginaliziranimi posamezniki in skupinami, so med pandemijo postali še bolj ranljivi in bolj kot ostali izpostavljeni okužbi, njihov dostop do javnega zdravstva in drugih storitev je bil še težji in slabši (tudi v primerjavi s preostalimi prebivalci); poleg tega so se poslabšali njihove že obstoječe bolezni in (zdravstvena) stanja (npr. diabetes, debelost, hipertenzija, srčno-žilne težave itd.). V primerjavi s preostalimi prebivalci so, kot kažejo podatki, pogosto trpeli prekomerno smrtnost (Kumar et al. 2021; OECD 2022).

Negativne izkušnje, vplivi in posledice pandemije covida-19 in kriznega upravljanja potrjujejo, da morajo za povečanje odpornosti na podobne krize in za boljše soočanje s krizami v prihodnosti vsa okolja pripraviti načrte in ukrepe za boljšo odpornost in okrevanje na vseh ravneh. Ti načrti in ukrepi morajo izboljšati dostop do javnih storitev za vse prebivalce, zagotoviti enak dostop, zmanjšati digitalne in druge razlike ter na vseh področjih spodbujati vključevanje, enakost in enakopravnost vseh posameznikov, ne glede na spol, etično pripadnost in katero-koli drugo osebno lastnost in status, skupin in skupnosti. Poleg tega da zagotavljajo enakopravno vključevanje in integracijo, morajo ti načrti in ukrepi preprečevati tudi vse vrste nasilja. Med posamezniki in skupinami morajo ti načrti in ukrepi posebno pozornost nameniti ženskam, otrokom in mladim, starejšim, osebam z invalidnostjo, posameznikom v negotovih delovnih in socialnih razmerah, brezdomcem in različnim družbenim manjšinam, vključno z narodnimi, etničnimi, jezikovnimi in verskimi manjšinami, skupnostjo LGB-TQIA+ ter drugimi marginaliziranimi skupinami in posamezniki (FRA 2022a; 2022b; UN 2020).

Za pripadnike narodnih, etničnih in jezikovnih manjšin ter te skupnosti je ključna (upo)raba manjšinskih in regionalnih jezikov v javni komunikaciji na sploh in tudi v kriznem upravljanju, kar je potrdila spletna anketa, izvedena med

marcem in junijem 2020 v državah članicah EU med člani federalne unije evropskih narodnih manjšin (FUEN). Javna raba maternega jezika, informacije, komunikacija, javne storitve in krizna navodila v manjšinskih jezikih prispevajo k boljši vključenosti manjšin in izboljšujejo učinkovitost, legitimnost in demokratičnost kriznega upravljanja. Bodo pa pandemija in restriktivni ukrepi verjetno dolgoročneje vplivali na etnično vitalnost manjšin. Med restriktivnimi kriznimi ukrepi so manjšine in obmejne skupnosti posebej prizadeli zaprtje državnih mej, ki je zaustavilo vsakodnevne čezmejne stike, sodelovanje in migracije, zaprtje manjšinskih in/ali dvojezičnih šol, odpoved tradicionalnih manjšinskih dogodkov in prireditev. Na krizo, omejevalne in represivne ukrepe so se bolje odzvale manjšine, ki imajo podporo držav etničnega izvora, ki so dobro notranje organizirane ter povezane, ki so vključene v širše družbeno okolje, imajo dostop do informacijske tehnologije, komunikacijske in institucionalne infrastrukture za organizacijo nadomestnih spletnih in hibridnih dejavnosti ter so se sposobne prilagajati spremenjeni situaciji, npr. slovenska manjšina v Avstriji (FUEN 2020; Grafenauer in Jesih 2020; Jurić Pahor 2020).

Pandemija in krizno upravljanje sta dodatno poglobila dolgotrajno izključenost, revščino in diskriminacijo Romov, največje najbolj marginalizirane evropske etnične manjšine. Neustrezna bivališča brez pitne in sanitarne vode ter ustreznih sanitarij so Romom pogosto onemogočala uresničevanje preventivnih in drugih javnozdravstvenih ukrepov, prav tako pa je bil otežen njihov dostop do zdravstvenih storitev. Izpostavljeni izključujočemu in pogosto rasističnemu medijskemu poročanju in javnemu diskurzu, ki sta v Bolgariji, na Slovaškem, v Romuniji in nekaterih drugih državah Rome prikazovala kot kolektivno grožnjo javnemu zdravju, so bili v nekaterih okoljih žrtve nesorazmernih represivnih kriznih ukrepov, ki so posebej prizadeli romska naselja. V Sloveniji in po Evropi sta romske učence bolj kot ostale prizadela zaprtje šol in dolgotrajno izobraževanje na daljavo, saj pogosto niso imeli ustreznega digitalnega dostopa in tehnične opreme. Zato se je njihov izobraževalni uspeh še dodatno poslabšal, povečali pa so se njihova izključenost ter težave pri vzpostavljanju stika in sodelovanja med učitelji, romskimi učenci in njihovimi starši (Bešter in Pirc 2020; FRA 2020b; Matache in Bhabha 2020).

Večina omenjenih avtorjev ugotavlja, da demokratičnost in legitimnost kriznega upravljanja prispevata k njegovi boljši učinkovitosti. Menijo, da izključevalno, restriktivno in represivno krizno upravljanje – ob dominaciji izvršilne oblasti v družbenih okoljih – negativno vpliva na demokracijo ter krepi populizem in neliberalno demokracijo, kar se je med pandemijo izrazilo v krepitvi izključevanja, diskriminacije, agresivnih nacionalizmov, rasizma in ksenofobije (npr. Elias et al. 2021).

Ob zavedanju, da v družboslovju in humanistiki ni idealnih in v nekaterih primerih celo zadovoljivih pristopov in metod za proučevanje kompleksnih, dinamičnih in nenehno spreminjajočih se (družbenih) pojavov in konceptov ter percepcij in stališč o njih, smo se – skladno s pristopom metodološkega

pluralizma, ki se je izkazal za uporabnega na področju etničnih študij (npr. Della Porta in Keating 2008) – v okviru navedenih raziskovalnih projektov odločili za kvantitativno terensko raziskovanje z uporabo odprtih globinskih intervjujev. Pregled literature, dosedanje raziskovanje in njegovi rezultati, prijavi omenjenih raziskovalnih projektov in neformalni pogovori s pripadniki različnih manjšinskih skupnosti, s katerimi smo preverjali nekatera izhodišča in koncepte, so predstavljali vsebinska in metodološka izhodišča za oblikovanje vprašanj za odprte globinske intervjuje. Za oba projekta smo pripravili protokol, ki poleg podrobnih navodil za izvedbo intervjujev vsebuje tudi jedrna vprašanja, zastavljena vsem intervjuvancem. V okviru projekta LEGITIMULT, ki je zlasti relevanten za raziskovanja percepcij in stališč intervjuvancev o legitimnosti kriznega upravljanja in ukrepov, je protokol vključeval štirinajst jedrnih vprašanj s podvprašanji, ki so jih raziskovalci, ki so intervjuje opravljali, dopolnjevali z dodatnimi vprašanji, kadar so ocenili, da je to potrebno. Vprašanja so bila zasnovana tako, da ugotavljajo percepcije in stališča intervjuvancev, pripadnikov različnih manjšin o pandemiji in krizi covida-19 ter kriznem upravljanju z vidika legitimnosti kriznega upravljanja in ukrepov, njihovega vpliva na človekove in manjšinske pravice, na situacijo, položaj, varstvo, vključevanje in integracijo njihovih (in drugih) manjšin. Na podlagi preteklih izkušenj, da pripadniki in zlasti predstavniki različnih manjšin pogosto želijo, da so v raziskavah, raziskovalnih rezultatih in objavah, ki iz njih izhajajo, vidni njihovo ime, delo, položaj v manjšinski skupnosti in njihova stališča, jim to omogočamo, skladno s pravili in standardi etičnega raziskovanja. Vsak intervjuvanec se odloči, če želi, da se njegov intervju anonimizira, ali pa poda soglasje, da se intervju ne anonimizira in so identiteta in podatki, posredovani v raziskovanju, vidni in javni. Upošteva je specifične raziskovanja manjšinskih skupnosti in tematik so bili prvi intervjuvanci izbrani na podlagi obstoječih stikov in informacij o posameznih manjšinskih skupnostih. Kot omenjeno, intervjuvance lahko štejemo za poznavalce manjšinskih tematik in strokovnjake: vključeni pripadniki posameznih manjšin so aktivisti, člani manjšinskih društev in organizacij ter manjšinski funkcionarji, ostali intervjuvanci pa so strokovnjaki, ki delujejo na specifičnih področjih in se ukvarjajo s specifičnimi manjšinskimi skupnostmi in njihovimi pripadniki. Pristop »snežene kepe« je bil uporabljen za izbor dodatnih intervjuvancev in manjšinskih skupnosti. Iz posamezne manjšinske skupnosti smo poskusili vključiti vsaj tri intervjuvance, da bi zaznali notranjo raznolikost teh skupnosti in obstoj različnih percepcij in stališč. Kadar to ni bilo mogoče, smo opravili tudi intervju z le enim pripadnikom specifične manjšinske skupnosti ali strokovnjakom, ki se s specifično problematiko ukvarja, ker smo presodili, da je to dragoceno za zaznavanje percepcij in stališč v teh skupnostih ter za ocenjevanje in interpretacijo pridobljenih podatkov in raziskovalnih rezultatov.

Na intervjujih intervjuvance v okviru jedrnih vprašanj sprašujemo o njihovih percepcijah, ocenah in stališčih do: odnosov med večino in manjšinami ter med manjšinami v času pandemije; vključevanja in integracije njihove manjšine

in njenih pripadnikov; kriznega upravljanja in ukrepov – upošteva je njihov vpliv na človekove pravice, varstvo manjšin in diskriminacijo; učinkovitosti, uspešnosti, demokratičnosti in legitimnosti kriznega upravljanja in ukrepov; vpliva in posledic kriznega upravljanja in ukrepov za njihovo skupnost in njene pripadnike nasploh in v primerjavi z večino in drugimi manjšinami; možnih predlogov in sprememb, ki bi izboljšali krizno upravljanje, povečali njegovo demokratičnost in legitimnost, zmanjšali restriktivnost in represivnost kriznih ukrepov, ki omejujejo človekove pravice in svoboščine kot npr. omejevanje gibanja, zapiranje mej in šol; legitimnosti oblasti, kriznega upravljanja in ukrepov na posameznih ravneh. Vprašamo jih tudi o njihovem zaupanju do oblasti na posameznih ravneh ter o predlogih za izboljšanje vključevanja in participacije manjšin in njihovih pripadnikov v procesih kriznega upravljanja na vseh ravneh odločanja.

Odgovore intervjuvancev na jedrna vprašanja in njihova dodatna razmišljanja ob intervjujih vnašamo v bazo podatkov, ki smo jo zasnovali in organizirali na podlagi kodirne sheme, ki izhaja iz jedrnih vprašanj. Vanjo v obliki besedila, ki so ga posredovali intervjuvanci, vnašamo (vsebinske) odgovore intervjuvancev, ki so aktualni za posamezno vprašanje, kar omogoča pregled in primerjavo odgovorov intervjuvancev. Baza podatkov je organizirana po vsebinskih sklopih na podlagi posameznih vprašanj, po posameznih manjšinskih skupnostih, iz katerih intervjuvanci izvirajo oziroma na katere se nanašajo odgovori intervjuvancev, ter po državah, kjer so bili intervjuji izvedeni. Bazo podatkov sproti dopolnjujemo s podatki in odgovori dodatno izvedenih intervjujev. Baza podatkov omogoča, da zaznavamo podobnosti, razlike in specifičnosti v odgovorih intervjuvancev na posamezna vprašanja, ki odražajo njihove percepcije in stališča. Pri tem se zavedamo, da uporabljeni pristop, ki ponuja vpogled v specifične percepcije in stališča posameznih intervjuvancev ter podobnosti in razlike znotraj posameznih skupin in skupnosti, le pogojno omogoča primerjavo med različnimi skupnostmi in med državami. Pridobljenih podatkov in rezultatov tudi ni mogoče nekritično posploševati.

Za koristno dopolnilo ostalim pristopom in metodam raziskovanja ocenjujemo neformalne razgovore s pripadniki in aktivisti različnih manjšin (npr. nacionalne, etnične in jezikovne manjšine, migranti itd.) in posamezniki, ki se z manjšinsko tematiko ukvarjajo (npr. predstavniki različnih institucij in društev, raziskovalci). Pogovarjali smo se o terminologiji in konceptih, o širšem kontekstu kriznega upravljanja in družbenega vključevanja manjšin v pripravah na terensko raziskovanje in med njegovim izvajanjem. Pomagali so pri preverjanju uporabljene terminologije in konceptov ter pri njihovem boljšem pojasnjevanju intervjuvancem. Opozarjajo na specifičen položaj in značilnosti intervjuvancev (npr. izobrazba, status, vključenost in integracija), specifičnost manjšinskih in drugih proučevanih skupnosti, na njihovo notranjo pluralnost in raznolikost. Zato pred začetkom intervjujev intervjuvance najprej prosimo, da nam pojasnijo svoje (pogosto zelo različno) razumevanje posameznih terminov in konceptov, preden jim predstavimo, kako jih uporabljamo v okviru obeh projektov.

Iz izkušenj vemo, da intervjuvanci intervjuje pogosto dojemajo kot formalno komunikacijo, ki terja družbeno korektno obnašanje in odgovore, kar lahko vpliva na njihove odgovore, izražene percepcije in stališča. V neformalni komunikaciji so praviloma udeleženci bolj sproščeni in izrazijo tudi tisto, česar v formalni komunikaciji ne želijo povedati. Zato so neformalni razgovori tudi dopolnilo intervjujev ter pomagalo pri ocenjevanju in interpretaciji odgovorov intervjuvancev.

PREDSTAVITEV NEKATERIH UGOTOVITEV TERENSKEGA RAZISKOVANJA

Pri predstavitvi rezultatov terenskega raziskovanja in njihovi interpretaciji opozarjamo, da kakšna tretjina sogovornikov v neformalnih razgovorih in intervjuvancev omenja na začetku razgovora ali intervjuja in/ali pri odgovarjanju na posamezna vprašanja, da je od vrhunca pandemije covid-19, krize in posameznih restriktivnih in represivnih ukrepov minilo že nekaj časa. Zato se včasih ne spomnijo podrobnosti in niso prepričani o zanesljivosti svojega spomina. Skladno z navedenimi omejitvami opravljenega terenskega raziskovanja in pridobljenih kvalitativnih podatkov v tej predstavitvi navajamo predvsem nekaj podobnosti, razlik in specifičnosti, ki jih je mogoče zaznati v odgovorih intervjuvancev. Skoraj vsi sogovorniki se strinjajo, da formalno in neformalno vključevanje v (demokratske) procese odločanja, sodelovanje pripadnikov manjšin, njihovih predstavnikov in (po)svetovalnih teles, v katerih sodelujejo, ter komuniciranje v manjšinskih jezikih prispevajo k demokratičnosti, večji legitimnosti in učinkovitosti kriznega upravljanja, odločitev in ukrepov. Odločevalcem priporočajo, naj upoštevajo obstoječo družbeno pluralnost in raznolikost, specifične situacije, potrebe in interese različnih manjšin ter raznolikost in obstoj različnih interesov znotraj manjšin.

Pripadniki narodnih/etničnih/jezikovnih manjšin menijo, da morajo oblasti (vsaj) na območjih, kjer te manjšine živijo, v vsakdanjem življenju in zlasti v kriznih situacijah zagotoviti informacije, navodila in komuniciranje tudi v jezikih teh manjšin. Pri tem ne gre le za načelno zagotavljanje pravic in varstva manjšin in njihovih pripadnikov v demokracijah, ampak taka praksa izboljšuje učinkovitost in kakovost ter povečuje legitimnost (družbenega in političnega) odločanja, vključno s kriznim upravljanjem in ukrepi. To je zlasti pomembno, kadar vsi pripadniki teh manjšin ne razumejo dobro uradnega/večinskega jezika.

Intervjuvanci pogosto ugotavljajo, da je v začetnih fazah pandemij in kriz težko ali nemogoče vključiti v odločanje različne akterje, saj je treba čim prej sprejeti nujne odločitve in krizne ukrepe za zaščito življenj, javnega zdravja in varnosti. Vendar priporočajo, da se odločevalci, takoj ko je mogoče, vsaj posvetujejo z relevantnimi akterji, vključno s pripadniki in zlasti predstavniki manjšinskih in marginaliziranih skupnosti. Kadar je mogoče, naj jih vključijo v odločanje. Menijo, da morajo krizne odločitve in ukrepi upoštevati tudi specifične situacije, potrebe in interese manjšinskih, specifičnih in marginaliziranih

skupnosti ter oseb s posebnimi potrebami v posameznih okoljih. Med odgovori in predlogi intervjuvancev kaže omeniti stališča, da je treba vse prebivalce in skupnosti vključiti v vseživljenjsko državljansko vzgojo in izobraževanje za vključujoče družbe, da se tako opolnomočijo za polno vključevanje, sodelovanje/participacijo in integracijo v okoljih, kjer živijo; še posebej pa je to pomembno za pripadnike manjšinskih in drugih specifičnih skupin in skupnosti ter te skupine in skupnosti kot celote.

V neformalnih razgovorih in intervjujih skoraj vsi pripadniki manjšin poudarjajo, da morajo demokratične družbe zagotavljati najvišje standarde človekovih pravic in (temeljnih) svoboščin. Pravice manjšin (in na njih temelječe manjšinsko varstvo) so človekove pravice in svoboščine. Načela enakih pravic, enakosti in nediskriminacije bi morala vsem enakopravno zagotavljati pravice in svoboščine ter preprečiti namerno ali nenamerno, neposredno ali posredno diskriminacijo na podlagi rase, spola, rojstva, katerekoli osebne značilnosti, narodnega/etničnega ali socialnega porekla in pripadnosti in/ali razreda, jezika, vere, spolne usmerjenosti, prepričanj in političnih ali drugih mnenj in vrednot. Menijo, da je raven vključevanja, integracije, zaščite in sodelovanja oz. participacije oseb, pripadnikov in predstavnikov različnih specifičnih, manjšinskih in/ali marginaliziranih skupnosti ter teh skupnosti kot kolektivnih subjektov ključni kazalnik razvoja in uresničevanja demokracije v posameznih okoljih. Pri oblikovanju, urejanju in uveljavljanju varstva manjšin in pri preprečevanju vseh oblik diskriminacije morajo vsa okolja upoštevati specifične situacije, potrebe in interese sleherne skupnosti in njenih pripadnikov, kar pomeni, da morajo različne situacije in kontekste obravnavati različno. Poudarjajo, da posamezne (zlasti splošne) politike ne vplivajo enako na vse posameznike in skupnosti, ki v posameznem okolju živijo, zato ugotavljajo, da so manjšine in marginalizirane skupnosti ter njihovi pripadniki pogosto nesorazmerno (večinoma bolj) prizadeti. Menijo, da so pandemija covida-19, krizno upravljanje in (zlasti restriktivni in represivni) ukrepi najbolj prizadeli marginalizirane, bolj izolirane in slabše integrirane skupnosti, kot so Romi in skupnost LGBTIQ+, ter njihove pripadnike, ki so bili bolj diskriminirani kot večinsko prebivalstvo, pa tudi druge manjšine in njihovi pripadniki. Posebej so bili diskriminaciji izpostavljeni posamezniki, ki se identificirajo z več manjšinami in/ali marginaliziranimi skupnostmi (npr. etnična/nacionalna manjšina, LGBTIQ+, nezaposleni, revni in socialno prikrajšani itd.).

Preliminarne analize kažejo, da se percepcije in stališča o situaciji in položaju posameznih manjšinskih in drugih specifičnih, zlasti marginaliziranih skupnosti ter njihovih pripadnikov v času pandemije covida-19, o učinkovitosti in legitimnosti kriznega upravljanja in ukrepov, pa tudi o vplivu in posledicah kriznega upravljanja in posameznih (zlasti restriktivnih in represivnih) ukrepov za te skupnosti in njihove pripadnike (pomembno) razlikujejo. Gre za specifične zaznave in interpretacije posameznikov ne le med različnimi skupnostmi, ampak tudi znotraj posameznih skupnosti. To potrjuje (notranjo) kompleksnost, dinamičnost, pluralnost in raznolikost teh skupnosti ter dodatno pojasnjuje,

zakaj je potrebna previdnost pri primerjanju in še zlasti pri interpretaciji in poploševanju ugotovitev. Neformalni pogovori in intervjuji kažejo, da sogovorniki krizno upravljanje zaznavajo kot izključevalno, centralizirano in nedemokratično. Vendar niso prepričani, ali bi manj centralizirane in bolj vključujoče prakse, ki bi sicer povečale legitimnost kriznega upravljanja, bile uspešnejše. Ocenjujejo, da je sprva in na nacionalni ravni meritokratsko, centralizirano, izključujoče in nedemokratično krizno upravljanje z uveljavljanjem restriktivnih in tudi represivnih ukrepov učinkovitejše, upravičeno in celo nujno, da se preprečijo najhujše posledice. Na lokalni in regionalni ravni ter kasneje v krizi bi bilo dobrodošlo, bolj legitimno in verjetno uspešnejše bolj vključujoče krizno upravljanje, v katerem bi sodelovali tudi predstavniki različnih manjšinskih skupnosti.

Ob soglasju, da bi več vključevanja, participacije in demokracije ter upoštevanje specifičnih situacij, pravic, (socialnih, zdravstvenih, izobraževalnih, kulturnih in ekonomskih) potreb in interesov različnih, manjšinskih in/ali marginaliziranih skupnosti in njihovih članov izboljšalo legitimnost, učinkovitost in uspešnost kriznega upravljanja in ukrepov zlasti na regionalni in lokalni ravni, poudarjajo, da bi morali vse krizne politike in ukrepi imeti jasne pravne temelje, ki opredeljujejo naravo, obseg, vsebino in trajanje ukrepov, omogočajo njihovo prilagodljivost in zagotavljajo boljšo predvidljivost.

Med restriktivnimi in represivnimi ukrepi so intervjuvanci kot posebej problematične navedli omejevanje in/ali začasni suspenz posameznih človekovih pravic in svoboščin, omejevanje gibanja in zaprtja, zapiranja državnih meja, zapiranje šol in dolgotrajno izobraževanje na daljavo. Intervjuvanci iz narodnih/etničnih/jezikovnih manjšin in obmejnih skupnosti opozarjajo, da so omejitve gibanja, zaprtja in zaprtje mednarodnih meja prekinili njihovo čezmejno sodelovanje in mobilnost, povezave s sorodnimi skupnostmi in državami ter ljudmi na drugi strani meja. Ti ukrepi so vsaj začasno ustavili in/ali bistveno otežili kulturno, športno in družbeno življenje manjšin, njihove izobraževalne dejavnosti in programe usposabljanja. Čez čas so odpovedane (socialne, kulturne in izobraževalne) množične dogodke in tradicionalne programe, pomembne za ohranjanje, promocijo in razvoj njihove kulture, identitete, načina življenja in njihovih skupnosti, vsaj do določene mere nadomestile spletne dejavnosti. Vseeno ugotavljajo, da so ti ukrepi vplivali na vitalnost manjšinskih skupnosti. Čeprav se strinjajo, da sta zapiranje šol in učenje na daljavo med pandemijo covida-19 prizadela vse, ugotavljajo, da so učenci, dijaki in študenti iz manjšinskih in/ali marginaliziranih skupnosti te omejitve občutili bolj kot preostali del prebivalstva.

Med pandemijo na Hrvaškem in v Sloveniji so imeli pripadniki izoliranih in marginaliziranih skupnosti, kot so Romi, ki so pogosto nezaposleni in socialno ogroženi, dodatne probleme pri dostopu do zdravstvenih in drugih javnih storitev (kot je bilo izobraževanje na daljavo), ki so bile dostopne digitalno. Ker pogosto niso imeli IT-opreme, dostopa do interneta in pomembnih informacij, potrebnih znanj in veščin, se niso mogli naročati pri zdravniku in so težje prišli do cepljenja. Slabe bivalne razmere in neustrezna komunalna infrastruktura so

oteževali osebno higieno in izvajanje preventivnih ukrepov. Za romske učence, ki doma niso imeli niti osnovnih pogojev, je bilo izobraževanje na daljavo še bolj težavno kot za njihove sošolce. Pripadnikom skupnosti LGBTQ+ na Hrvaškem, ki so pred pandemijo zaradi negativnega odnosa v družbi, zakonodaje in diskriminacije zdravstvene storitve opravljali v tujini, je bilo to v času pandemije in zaprtja meja onemogočeno. Njihov dostop do zdravstvenih storitev je bil zato otežen, občutek ogroženosti in pritiski nanje pa so se povečali. Nekaj intervjuvancev na Hrvaškem in v Sloveniji je poudarilo, da so bili pripadniki te skupnosti med zaprtjem družbe bolj prizadeti in ogroženi tudi zato, ker so bili pogosto prisiljeni, ko izhod ni bil dovoljen, stalno živeti v njim neprijaznem družinskem ali drugem okolju, v katerem so bili izpostavljeni negativnim stereotipom, šikaniranju in včasih tudi (zlasti psihičnemu) nasilju.

SKLEP

Kot omejeno, članek poskuša zapolniti praznino, ki jo je zaznal pregled strokovne in znanstvene literature. Ponuja kratek pregled literature in nekaterih konceptualnih in metodoloških vprašanj raziskovanja percepcij in stališč pripadnikov družbenih manjšin in specifičnih skupnosti o pandemiji covid-19, krizi in kriznem upravljanju med pandemijo. Na podlagi terenskega raziskovanja poskuša zaznati njihove percepcije in stališča o legitimnosti kriznega upravljanja in ukrepov, o vplivu kriznega upravljanja in ukrepov na človekove pravice in svoboščine, na situacijo, položaj, pravice, varstvo, vključevanje in integracijo (njihove in drugih) manjšin. Predstavlja nekaj ključnih ugotovitev terenskega raziskovanja, izvedenega z uporabo odprtih globinskih intervjujev v sosednjih državah Avstriji, Hrvaški, Italiji, Madžarski in Sloveniji. Predstavljene ugotovitve omogočajo, da potrdimo izhodiščni domnevi. Ugotavljamo, da strategije, procesi, politike in ukrepi kriznega upravljanja v pluralnih in raznolikih družbah vplivajo na vse in na vsa področja življenja v teh okoljih (vključno z javnim zdravjem, izobraževanjem in drugimi javnimi storitvami), kar potrjujejo tudi druge raziskave in študije (npr. ECDC 2023). Odgovori intervjuvancev potrjujejo, da krizno upravljanje in ukrepi praviloma bolj kot ostalo populacijo prizadenejo različne manjšine in marginalizirane skupnosti/skupine ter njihove pripadnike. Intervjuji in neformalni razgovori so potrdili tudi, da intervjuvanci menijo, da ustrezna, pravočasna in celovita krizna komunikacija, ki poteka tudi v jeziku manjšin, ter formalno in dejansko sodelovanje (participacija) ali vsaj simbolično vključevanje manjšin in njihovih pripadnikov (predvsem njihovih formalnih/neformalnih predstavnikov) v oblikovanje, sprejemanje in izvajanje procesov kriznega upravljanja, strategij, politik in ukrepov izboljšajo legitimnost in učinkovitost kriznega upravljanja.

Upošteva izkušnje pandemije covid-19 so mnenja in predlogi intervjuvancev, ki so jih ti izrazili v svojih odgovorih na vprašanja ob intervjujih, ter ugotovitve in priporočila, oblikovana v okviru predstavljenih raziskovalnih projektov, koristni za zagotavljanje boljše odpornosti pluralnih in notranje raznolikih

družb ter bolj demokratično, legitimno, kakovostno in učinkovito krizno upravljanje pri srečevanju s prihodnjimi krizami. Razmišljati kaže zlasti o tem, kako zagotoviti, da bodo odločevalci pri odločanju upoštevali tudi specifične potrebe in interese različnih manjšinskih in drugih specifičnih skupnosti in njihovih pripadnikov, ter kako zagotoviti in organizirati njihovo sodelovanje v procesih kriznega upravljanja in pri odločanju o kriznih ukrepih. Zato je za boljšo odpornost družb v kriznih situacijah v prihodnje pomembno, da se kontinuirano in sistematično nadaljuje raziskovanje teh tematik.

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PERCEPTIONS OF MEMBERS OF SOME SOCIAL MINORITIES ON THE LEGITIMACY OF CRISIS MANAGEMENT DURING THE COVID-19 PANDEMIC: PRESENTATION OF FIELD RESEARCH

Abstract. *The article presents a brief overview of the literature, conceptual and methodological framework, and initial findings of field research on the perceptions and attitudes of persons belonging to social/national/ethnic/linguistic minorities as concerns the COVID-19 pandemic and crisis management. Focus is given to the legitimacy of the crisis management and measures, their impact on human rights, and implementation of the principle of non-discrimination, as well as the situation, status, rights, protection, inclusion and integration of minorities. Using open-ended in-depth interviews, from summer 2021 to June 2024 the research was conducted in Austria, Croatia, Italy, Hungary and Slovenia (as part of ARRS/ARIS and Horizon Europe projects).*

Keywords: *COVID-19 pandemic, crisis management and measures, social minorities and persons belonging to them, national/ethnic/linguistic minorities, legitimacy of crisis management.*

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NEZAUPANJE, NEZADOVOLJSTVO ALI NEZNANJE? KVALITATIVNA ANALIZA NEVELJAVNIH GLASOVNIC NA VOLITVAH V EVROPSKI PARLAMENT**

Povzetek. Raznovrstne študije neveljavnih glasovnic le-te razumejo na različne načine, v pomembni meri pa jih vidijo tudi kot možnost izraza protesta volivcev. Kvalitativna analiza neveljavnih glasovnic na volitvah v Evropski parlament v Sloveniji razkriva, da so jih volivci uporabili tudi kot način izraza protesta. Podrobnejša analiza uporabljenih repertoarjev in narativov razkriva zlasti nezaupanje oziroma nezadovoljstvo nad ponujenimi kandidati na volitvah, še v večji meri pa jezo, kritiko sistema, politike ali/in politikov ter njihovega delovanja. V bistveno manjši meri pa je opazna kritika demokracije kot sistema vladavine. Kvalitativna analiza neveljavnih glasovnic na volitvah v Evropski parlament v tem pogledu potrjuje nekaterim preteklim ugotovitvam. Vendar pa določeni podatki kažejo tudi na neznanje oziroma zmote volivcev pri oddaji glasovnice z bolj kompleksno strukturo.

Ključni pojmi: neveljavna glasovnica, protest, volitve, nezaupanje, nezadovoljstvo, evropski parlament, Slovenija.

UVOD

V modernih predstavniških demokracijah so volitve zelo pomemben del demokratičnega procesa ter imajo različne funkcije, ki jih Katz (2000) razdeli v dve veliki skupini: na sistemske (kaj in kako volitve pripomorejo k udeležanju demokracije in delovanju političnega sistema) in personalne (kakšne so funkcije in pomen volitev za državljane in voljene posameznike). Zato ne preseneča,

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da so volitve in procesi ter institucije, ki jih vzpostavljajo, pogosto in raznoliko preučevani fenomeni in procesi. V tem pogledu raziskovalci v zelo veliki meri preučujejo volitve tudi z vidika politične participacije oziroma volilnega vedenja volivcev. Ob tem Fossati in Martinez I Coma (2020) ter Lioy (2024) izpostavljajo, da čeprav se raziskovalna pozornost v tem okviru osredotoča na pojasnjevanje volilnega vedenja volivcev, vključno z vprašanjem volilne udeležbe, se v bistveno manjši meri preučuje določeni vidik tega vedenja, in sicer neveljavne glasovnice. Oddaja neveljavne glasovnice, tj. glasovnice, na kateri volja volivcev zaradi različnih razlogov ni nedvoumno izražena oziroma izražena volja volivcev ne upošteva pravil glasovanja, ki volitve v posamezni državi vzpostavljajo, je namreč vidik volilnega vedenja (Lioy 2024). Fossati in Martinez I Coma (2020) pravita, da sta volilna udeležba in oddaja neveljavne glasovnice medsebojno povezana, celo dopolnjujoča se in zaporedna elementa, čeprav imata različne posledice.

Neveljavne glasovnice, najsi bo tiste popolnoma prazne, ali tiste, ki so na različne načine počekane, prečrtane itd. in z njih po vzpostavljenih pravilih glasovanja v določeni državi ni nedvoumno razvidna volja volivca, imajo pomembne funkcije in posledice za sistem, družbo in posameznika. Tako ne preseneča, da se je v zadnjih dveh desetletjih povečalo število empiričnih raziskav neveljavnih glasovnic (Kouba in Lysek 2019). To se ni zgodilo samo zaradi globalnega porasta števila in deleža neveljavnih glasovnic v odnosu do vseh oddanih glasovnic, ampak tudi zaradi mnogih razlik med državami v tem pogledu (Power in Garand 2007; Driscoll in Nelson 2014; Superti 2016; 2020).

Kouba in Lysek (2019) sta v metaanalizi 28 člankov, objavljenih do junija 2018, poudarila, da so bile zgodnje raziskave (študije primera ali primerjalne študije, osredotočene na eno ali več časovnih točk) pojasnjevanja neveljavnih glasovnic makro analize na agregirani ravni; ta vrsta raziskav še vedno močno prevladuje. Kljub vsemu so se kasneje pojavile tudi nekatere raziskave, ki izpostavljajo pojasnjevanje neveljavnih glasovnic z analizami lastnosti anketirancev, nekatere pa kombinirajo oba vidika. Vse omenjene raziskave so kvantitativne, medtem ko so kvalitativne raziskave, ki bi obravnavale vsebino neveljavnih glasovnic, zelo redke. Carrion-Yaguana in Carroll (2024) izpostavita, da so empirične raziskave pojasnjevanja neveljavnih glasovnic pogosto prikazale nekonsistentne ugotovitve, kar pa ni presenetljivo, če upoštevamo raznolikost metodoloških pristopov ter tudi različne kontekste raziskav. Kljub vsemu lahko ugotovimo, da je bil glavni poudarek empiričnih raziskav neveljavnih glasovnic namenjen pojasnjevanju stopnje oziroma obsega neveljavnih glasovnic ter tudi želji pojasniti, kaj motivira oddajo takih glasovnic.

Naša raziskava bo ena redkih, ki je osredotočena na kvalitativno raziskovanje neveljavnih glasovnic, saj je naš glavni namen razkriti in analizirati osnovne repertoarje in narative na neveljavnih glasovnicah, vse to s ciljem odgovoriti na vprašanje, v kolikšni meri so te glasovnice odsev protestne politike oziroma kakšen protest razkrivajo; protest in/ali nezaupanje proti sistemu, demokraciji, političnim strankam, kandidatom, Evropski uniji ali kaj drugega. Ni pa naš cilj

na tem mestu narediti bolj poglobljene analize, ki bi vsebovala tudi natančnejšo kontekstualno analizo kompleksnosti podatkov na glasovnicah, kot je na primer pomen kombinacij različnih elementov na glasovnicah, saj nekateri volivci svoje mnenje o politiki in politikih izražajo na zelo kompleksne načine. Tako smo na primer v primeru volitev, analiziranih v nadaljevanju, našli kar 22 različnih kombinacij različnih odzivov volivcev, ki imajo lahko svoje specifične pomeni. Prav tako je različen širši kontekst vrste volitev (npr. za predsednika države, državni zbor ali za evropski parlament). Tako bo to predvsem eksploratorna analiza neveljavnih glasovnic na volitvah v Evropski parlament leta 2019, pri čemer pa bodo izpostavljene tudi nekatere primerjave z ugotovitvami analize takih glasovnic na predsedniških volitvah leta 2017.¹

DEJAVNIKI NEVELJAVNIH GLASOVNIC

Kot izpostavitava Lundell in Högström (2021), se je večina raziskav ukvarjala z eno ali več od treh najpogostejše preučevanih skupin dejavnikov neveljavnih glasovnic: institucionalni dejavniki (npr. obveznost glasovanja, vrsta oziroma značilnost volilnega sistema, struktura glasovnice), socioekonomski dejavniki (npr. stopnja izobrazbe, pismenosti, socialne marginalizacije) in politični oziroma protestni dejavniki (npr. tesnost tekmovanja, protest proti sistemu, politiki, političnim strankam, nezaupanje v institucije oziroma politike). Kouba in Lysek (2019, 769) sta opozorila, da v resnici na mnogih volitvah različne skupine dejavnikov neveljavnih glasovnic zelo verjetno soobstajajo, Power in Garand (2007, 434) sta poudarila, da so razlogi za oddajo neveljavnih glasovnic lahko povezani z različnimi, prej omenjenimi skupinami dejavnikov, Cox in Le Foulon (2024, 5) pa, da se lahko medsebojno tudi krepijo (npr. kompleksna struktura glasovnice in nizka stopnja izobrazbe). Lundell in Högström (2021) sta povzela ugotovitve številnih raziskav ter izpostavila, da se raziskovalci strinjajo zlasti glede najpomembnejših dejavnikov neveljavnih glasovnic – obveznost glasovanja, kakovost demokracije in struktura glasovnice. Je pa Cohen (2018a, 111) že pred tem izpostavila, da so se številni raziskovalni modeli neveljavnih glasovnic v največji meri osredinili na kontekste oziroma dejavnike, ki se praviloma spreminjajo počasi, če sploh se. Čeprav priznava, da so to lahko v določenih pogledih zelo pomembni vidiki raziskovanja, pa je opozorila, da taki konteksti oziroma dejavniki le težko pojasnijo dinamiko sprememb stopnje oziroma obsega neveljavnih glasovnic na zaporednih volitvah. To lahko zagotovi zlasti skupina političnih oziroma protestnih dejavnikov, povezanih s stopnjo ali značilnostjo tekmovanja med političnimi strankami oziroma kandidati, (ne)zadovoljstvom in (ne)zaupanjem volivcev s politiko in institucijami.

¹ V Sloveniji je bilo opravljenih le nekaj raziskav neveljavnih glasovnic; raziskava Kogovšek in Krašovec (2020) na primeru predsedniških volitev leta 2017 ter dve zaključni deli študentov na različnih stopnjah študija – Božičko (2018) na primeru predsedniških volitev leta 2017, ki je bolj kvalitativno usmerjena študija, in Filli (2022) na primeru lokalnih volitev leta 2018, ki je pripravil bolj kvantitativno usmerjeno študijo.

Čeprav bomo pozornost v našem članku namenili zlasti neveljavnim glasovnicam kot izrazu protestne politike, bomo najprej kratko predstavili nekatere najpomembnejše razmisleke ter ugotovitve o pomenu pogosto analiziranih institucionalnih in socioekonomskih dejavnikov na neveljavne glasovnice.

Institucionalni dejavniki

Kot pravita Martinez I Coma in Werner (2019), institucionalni pristop v pojasnjevanju neveljavnih glasovnic poudarja pomen kombinacije volilnih pravil in značilnosti strankarskega sistema. V tej skupini dejavnikov je na vrhu pomembnosti pojasnjevanja stopnje oziroma obsega neveljavnih glasovnic pri mnogih avtorjih vprašanje obveznosti ali prostovoljnosti volilne udeležbe. Mnoge raziskave (npr. McAllister in Makkai 1993; Power in Roberts 1995; Power in Garand 2007; Superti 2016; Kouba in Lysek 2019; Cohen 2018a; Martinez I Coma in Werner 2019) namreč potrjujejo, da je moč v državah z obvezno volilno udeležbo zaslediti višjo stopnjo oziroma obseg neveljavnih glasovnic kot v sistemih, kjer je volilna udeležba prostovoljna.

Vrsta volilnega sistema, zlasti pa z njim povezana struktura glasovnice, tako v pogledu njene kompleksnosti kot tudi možnosti izbire med političnimi strankami oziroma kandidati, je med pomembnimi institucionalnimi dejavniki neveljavnih glasovnic. Ugotovitve o pomembnosti vpliva tega dejavnika na stopnjo oziroma obseg neveljavnih glasovnic pa so bolj heterogene kot pri prvem omenjenem dejavniku. Ko govorimo o strukturi glasovnice z vidika njene kompleksnosti, mnoge raziskave kažejo predvsem, da večja kot je kompleksnost glasovnice oziroma bolj ko se oddaljujemo od kategoričnega glasovanja, večja je verjetnost, da bo volivec pri oddaji glasu naredil napako ali pa nad glasovnico obupal in oddal prazno, zlasti naj bi bilo to prisotno pri t. i. odprtih glasovnicah, do določene mere pa tudi v sistemih s preferenčnim glasovanjem (Power in Roberts 1995; Taylor 2012; Pachon et al. 2017; Cunha Silva in Crisp 2022; Cox in Le Foulon 2024). Pomen strukture glasovnice je za stopnjo oziroma obseg neveljavnih glasovnic lahko pomemben še zlasti ob spremembah strukture glasovnic kot posledice sprememb volilnega sistema oziroma njenih elementov. Že pred skoraj sto leti je Mott (1926) tako opozoril, da vsaka sprememba volilnega sistema oziroma strukture glasovnice med volivce vnaša določeno zmedo. Ob tem velja izpostaviti, da tudi oblikovanje glasovnice (npr. navodila na njej, o tem, kdaj je glasovnica neveljavna, in navodila, kako narediti glasovnico veljavno) vpliva na to, ali bodo volivci oddali veljavno ali neveljavno glasovnico (Kimball in Kropf 2005).

Po drugi strani pa je struktura glasovnice pomembna tudi z vidika možnosti izbire med političnimi strankami oziroma kandidati. Tako so McAllister and Makkai (1993), Power in Garand (2007), Moral (2016) ter Martinez I Coma in Werner (2019) povezali značilnosti volilnega sistema z značilnostmi strankarskega sistema, pa tudi značilnostmi tekmovanja na volitvah s stopnjo oziroma obsegom neveljavnih glasovnic. Z naraščanjem velikosti volilne enote naj bi se

na glasovnicah pojavilo več političnih strank oziroma kandidatov, kar naj bi po eni strani volivcem ponujalo več možnosti za odločanje med njimi. »Večja ponudba« naj bi povzročila večjo možnost izbire, zato bi volivci na glasovnicah lažje našli stranke oziroma kandidate, ki jim želijo oddati svoj glas. Vse to naj bi po nekaterih ugotovitvah vplivalo na nižjo stopnjo oziroma obseg neveljavnih glasovnic (npr. Power in Garand 2007). Mogoče presenetljivo pa je več raziskav pokazalo, da »večja ponudba« lahko povzroči večjo stopnjo oziroma obseg neveljavnih glasovnic. To naj bi bilo povezano s povečanjem težavnosti odločanja volivca med mnogimi strankami oziroma kandidati. Ali kot pravita Cox in Le Foulon (2024), tak položaj lahko vodi v kognitivno obremenitev volivca, zmedenost, frustracijo in njegov umik od odločitve, komu oddati glas; ta obremenitev naj bi bila zlasti vidna med manj izobraženimi volivci. Te vidike je preučevala tudi Cohen (2018a), ki pa je ni zanimalo samo število političnih strank oziroma kandidatov na glasovnicah, ampak spremembe v obsegu ponudbe strank oziroma kandidatov.

Posamezni raziskovalci so analizirali tudi vpliv nekaterih drugih institucionalnih dejavnikov na stopnjo oziroma obseg neveljavnih glasovnic, npr. uporabo volilnih strojev za oddajo volilnega glasu, (ne)obstoje dvodomnosti, pomen volitev (t. i. drugorazredne volitve ali volitve prvega reda ipd.), a se ti dejavniki niso izkazali za (zelo) pomembne.

Socioekonomski dejavniki

Izhodišče raziskovalcev, ki so se v svojih analizah ukvarjali z vplivom socioekonomskih dejavnikov, je, da je družbena struktura pomemben dejavnik stopnje oziroma obsega neveljavnih glasovnic. Med najpogostejše preučevanimi v tej skupini dejavnikov so stopnja izobrazbe, pismenosti, urbanizacije in etnična heterogenost, v manjši meri pa tudi starost, nezaposlenost. Analize pa pogosto niso pokazale enostavnih razlag o pomembnosti in smeri povezanosti med temi dejavniki ter stopnjo oziroma obsegom neveljavnih glasovnic (Kouba in Lysek 2019).

Nižja stopnja izobrazbe volivcev naj bi vplivala na njihovo nižjo stopnjo znanja in informiranosti o politiki ter tako tudi na zmožnost volivcev, da opravijo ozaveščeno izbiro med strankami oziroma kandidati na glasovnici; tako so npr. McAllister in Makkai (1993), Power in Roberts (1995), Kimball in Kropf (2005), Hill in Young (2007), Lundell in Högström (2021) ugotovili, da se v tem primeru povečuje možnost oddaje neveljavne glasovnice. Podobno je tudi s pomenom stopnje pismenosti. Dejansko bi lahko razmišljali tudi o medsebojni povezanosti obeh dejavnikov ter ju razumeli kot vprašanje stopnje družbene marginalizacije. V takih okoljih se namreč pogostejše dogodi, da volivci zaradi pomanjkanja znanja, informacij, izkušenj in političnih veščin (nenamerno) oddajo neveljavno glasovnico. Ti dejavniki so še pomembnejši v okoljih z visoko kompleksnostjo glasovnice (McAllister in Makkai 1993; Hill in Young 2007; Driscoll in Nelson 2014). To pa pomeni, da se tesno prepletata dve skupini dejavnikov neveljavnih glasovnic: institucionalna in socioekonomska. Zato ne preseneča, da so nekateri

(Stiefbold 1965; Power in Roberts 1995; Power in Garand 2007) poudarili, da lahko le kombinacija skupin dejavnikov zagotovi veliko pojasnjevalno moč stopnje oziroma obsega neveljavnih glasovnic.

Zulfikarpasic (2001) je s svojimi analizami izzvala zgornje ugotovitve o povezanosti med stopnjo izobrazbe in stopnjo oziroma obsegom neveljavnih glasovnic; v njeni raziskavi se je namreč izkazalo, da so volivci, ki oddajo neveljavne glasovnice, v povprečju višje izobraženi kot povprečni volivec, kar naj bi nakazovalo, da je oddaja take glasovnice predvsem oblika izražanja protesta, bolj značilnega za višje izobražene volivce. Martinez I Coma in Werner (2019) sta bila podobnega mnenja, saj sta zapisala, da lahko višja stopnja izobrazbe volivce opremi za uporabo bolj prefinjenih oblik protesta; oddaja neveljavne glasovnice naj bi bila po njunem prepričanju taka oblika izražanja protesta.

Tudi pri preučevanju pomena stopnje urbanizacije na stopnjo oziroma obseg neveljavnih glasovnic so se pokazale različne ugotovitve, čeprav je več podatkov, da višja stopnja urbanizacije zmanjšuje stopnjo oziroma obseg neveljavnih glasovnic (Zulfikarpasic 2001; Power in Garand 2007; Kouba and Lysek 2019). Bolj jasna povezava se je pokazala med etnično heterogenostjo in stopnjo oziroma obsegom neveljavnih glasovnic – večja heterogenost vpliva na večjo stopnjo oziroma obseg neveljavnih glasovnic, so ugotovili npr. McAllister in Makkai (1993), Martinez I Coma in Werner (2019). Pri tem pa dodali, da se večja etnična heterogenost populacije pogosto povezuje z nižjimi stopnjami izobrazbe, politične informiranosti in izkušenosti.

NEVELJAVNE GLASOVNICE KOT IZRAZ PROTESTNE POLITIKE

Če sta kratko predstavljeni skupini dejavnikov pojasnjevanja stopnje oziroma obsega neveljavnih glasovnic jasno nakazovali, da je oddaja take glasovnice zlahka (tudi) posledica kompleksnosti volilnega procesa in/ali nezadostne usposobljenosti volivcev ter tako nenamerne oddaje neveljavne glasovnice, raziskovalci za tretjo skupino dejavnikov izpostavljajo, da je oddaja neveljavne glasovnice dejansko v funkciji želje volivcev izraziti protest. Alvarez et al. (2018) so v svoji taksonomiji protestne politike na volitvah oddajo prazne glasovnice ali glasovnice, ki jo volivci tudi na drugačen način naredijo za neveljavno, umestili v eno izmed petih oblik take politike na volitvah.

Stiefbold (1965), Ugglja (2008), Moral (2016), Alvarez et al. (2018), Cohen (2018b), Fossati in Martinez I Coma (2020), Superti (2020), Cunha Silva in Crisp (2022) ter Lioy (2024) ugotavljajo, da so vzroki za izražanje protesta lahko raznovrstni: od zaznane neodzivnosti političnih elit, nezadovoljstva z delovanjem sistema, nosilcev oblasti, demokracije, ekonomskim položajem ali ekonomskim sistemom, prek nezaupanja v (politične) institucije ali splošno gledano v politiko do nezadovoljstva s ponujenimi kandidati ali, splošneje, z možnostjo izbire na volitvah, pa tudi nezmožnostjo doseganja sprememb. Vsekakor pa lahko imajo neveljavne glasovnice funkcionalni pomen za demokracije; služijo lahko kot nekakšen barometer nezadovoljstva ali zgodnji opozorilni sistem pred morebitnimi

za demokracijo neželenimi ali nesprejemljivimi političnimi stališči, ki obstajajo ali se oblikujejo med volivci (Stiefbold 1965, 407) ali pa imajo instrumentalni namen, saj nakazujejo nezadovoljstvo z obstoječim političnim položajem (Driscoll in Nelson 2014, 549).

Ob tem Cohen (2018b) opozori, da se lahko motiv za izražanje protestne politike med posameznimi volitvami tudi spremeni. Superti (2016) in Cohen (2018b) sta poudarili, da je oddaja neveljavne glasovnice dandanes resda razširjena oblika izražanja političnega protesta, a je ne moremo razlagati kot moderni fenomen. Tako menita tudi Obradovic-Wochnik in Wochnik (2014). Sta pa slednja še izpostavila, da je bila oddaja neveljavne glasovnice v tem pogledu dolgo časa raziskovalno zapostavljena, saj je to oblika protesta, ki je javnosti nevidna. Pri raziskovanju dejavnikov neveljavnih glasovnic, zlasti pa v razumevanju le-teh kot izraza protestne politike, je zelo pomembno metodološko vprašanje, kako ločiti neveljavne glasovnice kot akt namernega delovanja (protesta) od neveljavnih glasovnic kot akta nenamernega delovanja oziroma volivčeve napake (Alvarez et al. 2018). Ta metodološki problem so izpostavili tudi nekateri drugi raziskovalci, npr. McAllister in Makkai (1993), Power in Garand (2007), Driscoll in Nelson (2014). Slednja ob tem opozarjata, da če vse neveljavne glasovnice brez kritične distance označimo za akt namernega delovanja oziroma izraz protesta, zanemarjamo možnost, da so se volivci v volilnem procesu nenamenoma in zaradi različnih vzrokov tako zmedli, da so oddali neveljavno glasovnico, po drugi strani pa obstoji nevarnost sistematičnega podcenjevanja nezadovoljstva volivcev, če vse neveljavne glasovnice interpretiramo zgolj kot napake volivcev. Ugglá (2008) je prepričan, da je oddajo neveljavne glasovnice težko videti kako drugače kot izraz protesta. Aron in Superti (2022) imata o tem jasno stališče, saj menita, da dejstvo, da so volivci pripravljeni oditi na volišče, po potrebi tudi čakati v vrsti, da na koncu oddajo neveljavno glasovnico, nosi jasno protestno sporočilo. Driscoll in Nelson (2014) sta bolj zadržana pri povezovanju neveljavnih glasovnic in razumevanja tega dejanja kot izvajanja protestne politike; prepričana sta, da so prazne neveljavne glasovnice posledica pomanjkanja (političnih) informacij volivcev, njihove ignorance ali apatije, druge vrste neveljavnih glasovnic pa so jasen izraz političnega protesta. O povezavi med značilnostjo neveljavne glasovnice in razumevanje le-te kot izraza protestne politike je že pred desetletji pisal Stiefbold (1965), ki je prazne neveljavne glasovnice videl kot odraz šibke protestne politike. Medtem naj bi bile druge vrste neveljavnih glasovnic (npr. poččkane, z dodanimi slikami, popisane z znaki, s slogani, z izjavami) odraz večje stopnje protestne politike (Stiefbold 1965; Hill in Young 2007; Driscoll in Nelson 2014).

Tovrstne razprave resda razkrivajo marsikatera nestrinjanja med raziskovalci o tem, kako razumeti neveljavne glasovnice – kot izraz protestne politike ali kot posledico napake volivcev pri oddaji glasovnice (Cohen, 2018b), a odpirajo nove, dodatne poti razmišljanja o »sporočilih«, ki jih take glasovnice prinašajo. Razumevanje takih »sporočil« pa kliče k odmiku od izrazitega kvantitativnega k vsaj začetnemu kvalitativnemu raziskovanju neveljavnih glasovnic.

NEVELJAVNE GLASOVNICE TER INSTITUCIONALNI IN DRUŽBENOPOLITIČNI KONTEKST V SLOVENIJI

Slovenija je leta 2004 postala polnopravna članica Evropske unije in tega leta so bile v Sloveniji tudi prvič izvedene volitve v Evropski parlament. Volilni sistem je ostal od prvih volitev leta 2004 do zadnjih volitev leta 2024 v bistvu enak; celotna Slovenija je ena volilna enota, uporablja se proporcionalni volilni sistem, z možnostjo oddaje enega preferenčnega glasu, za razdelitev mandatov je uporabljena t. i. d'Hondtova formula, za sestavo kandidatnih list pa je uveljavljena spolna kvota, velikost volilne enote pa se je spremenila s 7 (leta 2004) na 9 (leta 2024). Povedano pomeni, da volivec za volitve v Evropski parlament na volitvah dobi glasovnico, na kateri je praviloma in v primerjavi z volitvami v državni zbor ali za predsednika države napisanih več kandidatnih list in skupno gledano veliko kandidatov. Če upoštevamo še možnost oddaje preferenčnega glasu, potem lahko rečemo, da je struktura glasovnice za te volitve bolj kompleksna kot za ostali dve omenjeni vrsti volitev, izvedenih na nacionalni ravni. Verjetno prva izkušnja s tako, bolj kompleksno strukturo glasovnice tudi vsaj deloma pojasni relativno velik delež neveljavnih glasovnic na prvih volitvah v Evropski parlament (Tabela 1).

*Tabela 1: NEVELJAVNE GLASOVNICE NA VOLITVAH V EVROPSKI PARLAMENT
V SLOVENIJI V OBDOBJU 2004–2024*

	Število neveljavnih glasovnic	Delež neveljavnih glasovnic od vseh oddanih glasovnic
2004	25.938	5,6
2009	18.586	3,9
2014	17.590	4,2
2019	10.382	2,1
2024	31.182	4,4

Vir: Državna volilna komisija; <https://www.dvk-rs.si/>.

Kot so izpostavili različni avtorji, je pričakovati, da se skozi leta volivci na spremembe oziroma razlike v strukturi glasovnice navadijo oziroma pravila o tem, kako oddati veljavno glasovnico, bolje spoznajo. Tako verjetno v tem pogledu ne preseneča, da je viden trend upadanja deleža neveljavnih glasovnic skozi leta, in sicer ob zelo podobni (nizki) stopnji volilne udeležbe. Porast tega deleža je moč videti na zadnjih volitvah, pri čemer pa je treba povedati, da se je v primerjavi s preteklimi volitvami v Evropski parlament volilna udeležba povečala (z dobrih 24 % oziroma 28 % na skoraj 42 %). Predvidevamo, da se je verjetno vsaj del volivcev leta 2024 prvič srečal s tako, bolj kompleksno strukturo glasovnice.

Če je ta institucionalni okvir v dveh desetletjih, odkar se v Sloveniji izvaja tudi volitve v Evropski parlament, ostal dejansko stabilen, pa se je v širšem

družbenem in političnem kontekstu Slovenije v tem obdobju marsikaj spremenilo. Tu imamo v mislih zlasti zaupanje volivcev v politične institucije in politike, zadovoljstvo ljudi z delovanjem demokracije, njihov interes za politiko itn. Kot razkrivajo longitudinalni javnomnenjski podatki raziskave Slovensko javno mnenje (*Center za raziskovanje javnega mnenja in množičnih komunikacij*—CJMMK)² ter Tufis et al. (2024) v bazi projekta Truedem³, zaupanje volivcev v politične institucije in politike vse od začetka 90. let 20. stoletja v Sloveniji do danes ni bilo nikoli (zelo) visoko, a vseeno je mogoče skozi čas videti (izraziti) padec zaupanja v politike oziroma politiko ter najpomembnejše politične institucije – državni zbor, politične stranke, Evropski parlament in tudi v predsednika Republike Slovenije. Podobno tudi zadovoljstvo volivcev z delovanjem demokracije ni visoko. Kritično nizke vrednosti zaupanja oziroma zadovoljstva so bile zaznane v času največje ekonomske in finančne krize (2009–2013) (Krašovec in Johannsen 2016). Čeprav se je zaupanje v navedene institucije ter zadovoljstvo z delovanjem demokracije v zadnjih letih nekoliko povečalo, so to še vedno (zelo) nizke ravni. Kot kažejo podatki v bazi Truedem, leta 2014 na primer 34 % volivcev sploh ni zaupalo politikom, 31 % jih sploh ni zaupalo političnim strankam, 24,4 % državnemu zboru in 16,6 % Evropskemu parlamentu; leta 2018 so ti deleži nezaupanja nekoliko nižji (pri politikih je bil ta delež 23 %, pri strankah 20,6 %, pri državnem zboru 15,6 % in Evropskem parlamentu 14,3 %). Kljub takim (relativno visokim) stopnjam nezaupanja v najpomembnejše politične institucije in zadovoljstva z delovanjem demokracije pa slovenski volivci praviloma ne vidijo alternative v ukinitvi demokratičnega sistema oziroma zamenjavi le-tega z drugačnim sistemom.

Podatki o teh vidikih družbenopolitičnega konteksta nam dajejo izhodišče o tem, da (vsaj del) neveljavne glasovnice v Sloveniji lahko verjetno vidimo in razumemo (tudi) kot izraz protestne politike. Kvalitativna analiza neveljavnih glasovnic nam bo ponudila vpogled v (del) repertoarje in narative na takih glasovnicah. Iz te analize lahko dalje (vsaj deloma) ugotovimo, v kolikšni meri so te glasovnice odsev protestne politike oziroma kakšen protest razkrivajo.

ZNAČILNOSTI NEVELJAVNIH GLASOVNIC NA VOLITVAH V EVROPSKI PARLAMENT 2019

Za analizo značilnosti neveljavnih glasovnic na volitvah v Evropski parlament leta 2019 v Sloveniji smo na podlagi slučajnega sistematičnega vzorca iz vsake volilne enote izbrali tri volilne okraje oziroma okrajne volilne komisije (skupaj torej 24)⁴ in jih z dopisom prek elektronske pošte zaprosili za pridobi-

² Ankete Slovensko javno mnenje so dostopne prek Arhiva družboslovnih podatkov: <https://www.fdv.uni-lj.si/raziskovanje/publikacije/arhiv-druzboslovnih-podatkov>.

³ Projekt Truedem – Trust in European Democracies, <https://www.truedem.eu/>. Podatki iz projekta so dostopni na povezavi <https://www.truedem.eu/resources-and-deliverables/online-data-analysis>.

⁴ V politološkem in pravnem pogledu je Slovenija za volitve v Evropski parlament le ena volilna enota, v tehnično-izvedbenem pogledu pa se volitve izvedejo v osmih volilnih enotah, pri čemer je vsaka volilna enota razdeljena na enajst volilnih okrajev.

tev kopij vseh neveljavnih glasovnic na voliščih znotraj delokroga posamezne izbrane okrajne volilne komisije. Na prošnjo so se odzvali v 21 okrajnih volilnih komisijah, pri čemer so nam iz vsake volilne enote kopije neveljavnih glasovnic poslali iz vsaj ene zaprosene okrajne volilne komisije oziroma volilnega okraja. Število neveljavnih glasovnic na področjih posameznih okrajnih volilnih komisij, ki so nam posredovale njihove kopije, je bilo zelo različno – od malo več kot 60 do nekaj nad 200. Dodatno so se volilni okraji, za katere so nam okrajne volilne komisije posredovale kopije neveljavnih glasovnic, razlikovali tudi po številu volilnih upravičencev. Kot napovedano, bodo ob analizi neveljavnih glasovnic na volitvah v Evropski parlament leta 2019 izpostavljene tudi nekatere primerjave z ugotovitvami analize takih glasovnic na predsedniških volitvah leta 2017, na katerih je bil uporabljen enak metodološki pristop pridobivanja podatkov (glej Kogovšek in Krašovec 2020). Se pa omenjene volitve medsebojno v mnogočem razlikujejo (npr. struktura glasovnic, stopnja individualizacije volitev, (ne)zaupanje v institucijo predsednika države oziroma Evropski parlament ...), kar naj bi vplivalo na razlike v analiziranih vidikih neveljavnih glasovnic, tj. osnovnih repertoarjih in narativih na neveljavnih glasovnicah.

V Sloveniji se kot neveljavne glasovnice štejejo vse glasovnice, na katerih volja volivcev zaradi različnih razlogov ni nedvoumno izražena oziroma izražena volja volivcev ne upošteva pravil glasovanja, ki volitve vzpostavljajo.

Kvantitativna analiza neveljavnih glasovnic

Skupaj je bilo analiziranih 2.375 neveljavnih glasovnic. Pri tem je treba povedati, da je kvantitativna analiza teh glasovnic narejena na osnovni opisni ravni (absolutne frekvence in odstotki posameznih vrst neveljavnih glasovnic).

Kot vidimo v Tabeli 2, skoraj 60 % analiziranih neveljavnih glasovnic predstavljajo glasovnice, ki so imele več obkroženih kandidatov (bodisi na eni bodisi na različnih kandidatnih listah), pri čemer pa je na dodatnih 13 % neveljavnih glasovnic tudi obkroženih več kandidatov, ampak dosledno po en iz vsake od kandidatnih list; nekaj pa je tudi takih, na katerih so bile obkrožene vse liste. Zlasti podatek o dosledno obkroženem enem kandidatu iz vsake od kandidatnih list bi lahko interpretirali kot vpliv zmote oziroma neznanja volivcev na oddajo neveljavne glasovnice v kontekstu bolj kompleksne strukture glasovnice in možnosti oddaje preferenčnega glasu. Veliko (20 % vseh analiziranih) je tudi neveljavnih glasovnic, ki so bile na različne načine prečrtane.

Ob upoštevanju nekaterih že omenjenih institucionalnih in kontekstualnih razlik je zanimivo primerjati značilnosti neveljavnih glasovnic na volitvah predsednika države leta 2017 (glej Kogovšek in Krašovec 2020) in volitvah v Evropski parlament leta 2019, saj v tem vidiku lahko izpostavimo nekatere pomembne razlike. Glede na predstavljene ugotovitve različnih avtorjev bi lahko rekli, da je bilo na predsedniških moč razbrati več protestne politike kot na evropskih volitvah. Na prvih omenjenih volitvah leta 2017 so okoli polovico vseh neveljavnih glasovnic predstavljale tiste, ki so bile prečrtane (prečrtani so bili vsi kandidati);

če tem dodamo še okoli 30 % oziroma 40 % (odvisno od kroga volitev) analiziranih glasovnic, na katerih so bili dopisani kandidati, besedilo, risba, čačka, vidimo, da je bilo v veliki meri izraženo nezadovoljstvo oziroma nezaupanje v kandidate oziroma določen protest; kar je po mnenju Stiefbold (1965), Hill in Young (2007), Driscoll in Nelson (2014) odraz večje stopnje protestne politike, po mnenju Superti (2015, 13) pa bolj hrupna verzija oddaje prazne glasovnice, lahko celo rečemo protestne politike.

Tabela 2: ŠTEVILO IN DELEŽ RAZLIČNIH KATEGORIJ ANALIZIRANIH NEVELJAVNIH GLASOVNIC⁵

	število	odstotek
Popolnoma prazne glasovnice	207	8,7
Prečrtane glasovnice	472	19,9
Več obkroženih kandidatov	1386	58,4
Na vsaki kandidatni listi obkrožen en kandidat ali obkrožene vse liste	314	13,2
Dopisani kandidati	22	0,9
Dopisano besedilo	94	4,0
Risba	23	1,0
Čačka	9	0,4
Neveljaven kandidat na uradni prazni glasovnici	10	0,4
Skupaj	2375	106,9

Vir: Lastna analiza.

Na volitvah v Evropski parlament leta 2019 je ta oblika protestne politike vidna v bistveno manjšem deležu; 20 % je bilo neveljavnih glasovnic, ki so bile prečrtane, na manj kot 10 % analiziranih neveljavnih glasovnicah pa so bili dopisani kandidati, besedilo, risba oziroma čačka. Na drugi strani je moč videti približno enak odraz šibke protestne politike po Stiefboldu (1965) – na obeh omenjenih volitvah je bil namreč delež popolnoma praznih neveljavnih glasovnic podoben (okoli 10 % in 15 %, odvisno od kroga volitev pri predsedniških volitvah; okoli 9 % na volitvah v Evropski parlament).

Iz teh kvantitativnih podatkov bi lahko sklepali, da so volivci z neveljavnimi glasovnicami na predsedniških volitvah leta 2017 izražali predvsem nezadovoljstvo s ponudbo kandidatov, saj je bilo več kot 60 % analiziranih neveljavnih glasovnic, na katerih so bili prečrtani vsi kandidati oziroma so bili

⁵ Skupni odstotek presega 100 %, ker so nekatere glasovnice štete večkrat. V določenem številu neveljavnih glasovnic se namreč pojavljajo različne kombinacije, kot so na primer prečrtana glasovnica z dopisanim besedilom, prečrtana glasovnica z obkroženimi več ali vsemi kandidati, prečrtana glasovnica z dopisanim kandidatom, besedilom in z risbo ipd. To pomeni, da se vsaj nekateri volivci odločijo svoje mnenje oziroma protest izraziti na kompleksnejši način.

kandidati dopisani, medtem ko je bilo take vrste protestne politike manj na volitvah v Evropski parlament leta 2019 – ti dve kategoriji sta predstavljali 25 % analiziranih neveljavnih glasovnic.

Kvalitativna analiza neveljavnih glasovnic

Za vsebinsko razkritje (značilnosti) protestne politike je bila pripravljena dodatna kvalitativna raziskava neveljavnih glasovnic. V tako analizo so bile vključene neveljavne glasovnice, a) ki niso bile popolnoma prazne; b) ki niso bile samo prečrtane (prečrtani vsi kandidati); c) kjer ni bilo samo obkroženih več kandidatov. Smatramo namreč, da so prav preostale kategorije neveljavnih glasovnic tiste, katerih analiza nam lahko razkrije repertoarje in narative protestne politike; kakšen protest razkrivajo: protest, nezadovoljstvo in/ali nezaupanje proti sistemu, demokraciji, političnim strankam, kandidatom, Evropski uniji ali čemu drugemu. Kodirali smo tako, da smo okvirno uporabili pristop v treh korakih, in sicer odprto, osno in selektivno kodiranje (npr. Neuman 2014, 480–85). Ob pregledu glasovnic smo v prvem koraku izpisali vse dopisane elemente, v drugem koraku pa smo jih razvrščali v tipične kategorije (kandidate, tekste, risbe itd.), znotraj teh pa še v podkategorije (na primer različne vrste dopisanih kandidatov). Pri določenih kategorijah je bila razvrstitev do določene mere arbitrarna, kot na primer pri vulgarnih zapisih, ki bi jih lahko šteli tudi med jezne, a se nam je zdelo smiselno opozoriti nanje kot na posebno kategorijo. Kot se sicer praviloma pokaže pri kvalitativni analizi, so podatki pogosto večdimenzionalni in visoko kontekstualizirani.

V analizi je omenjena skupina neveljavnih glasovnic⁶ najprej razdeljena v dve večji skupini: tiste z dopisanimi oziroma alternativni kandidati ter tiste z dopisanim besedilom, dodanimi risbami in s čačkami. Znotraj teh dveh skupin smo z odprtim kodiranjem – brez vnaprejšnjega analitičnega okvira – opravili podrobnejšo tematsko analizo, katere rezultat je tipologija različnih odzivov volivcev.

Dopisani oziroma alternativni kandidati

V primerjavi s predsedniškimi volitvami leta 2017 je bilo na volitvah v Evropski parlament leta 2019 na analiziranih neveljavnih glasovnicah bistveno manjše število oziroma odstotek dopisanih kandidatov; na slednjih le 22. Če se je na analiziranih predsedniških volitvah pokazala kar velika pahljača različnih dopisanih imen politikov, nekdanjih ali aktualnih, iz Slovenije ali tujine, sta se v tem pogledu na evropskih volitvah pojavila le dva politika: Josip Broz Tito in Janez Janša. Slednji je imel na primer na eni glasovnici dodano tudi besedilo, npr. partija Ivana vodje našga Janšeta, Janez Janša idol in heroj, Janez idol heroj in osvoboditelj Ivan Janša. Nekaj je bilo junaških, uporniških karakterjev; tu je

⁶ Tu velja metodološko opozorilo, da je na podlagi tega izbora tako dodatno analiziranih le 158 ali 6,7 % zbranih neveljavnih glasovnic, pri čemer je potrebno upoštevati tudi, da so nekatere glasovnice upoštevane večkrat, saj je na nekaterih prisotnih več kategorij, npr. dopisan kandidat in dopisan tekst ali dopisan kandidat in narisana risba.

že »standardni« in kar fonetično zapisani Čak Norris, ne umanjka pa tudi Robin Hood. Očitno volivci pri iskanju alternativnih kandidatov tudi na evropskih volitvah niso pozabili na risanke, (otroške) knjige oziroma stripe ter njihove junake, saj med dodanimi alternativnimi kandidati najdemo Spuži Kvadratnika, Jako Racmana in družino ter tudi Listo veselih smrkcev in Smrkete; tudi te smo lahko »srečali« na predsedniških volitvah. Sta pa bili dodani tudi dve alternativni stranki, ki so si ju volivci zaželeli, in sicer Slovenska nacistična stranka in Starodavna partija Egipta. Na podlagi nekaterih dopisanih kandidatov sklepava, da so volivci tudi na evropskih volitvah na kandidatne liste dopisovali »navadne« državljane, ki so verjetno njihovi znanci, prijatelji ali sorodniki.⁷ Zanimiva kategorija analiziranih neveljavnih glasovnic so t. i. abstraktni kandidati, ko volivci s svojim posegom na glasovnici v resnici razkrivajo osebne oziroma značajske (zlasti pozitivne) lastnosti ali uspehe, ki si jih želijo oziroma jih pričakujejo pri kandidatih na volitvah. Če je bilo na predsedniških volitvah leta 2017 kar nekaj takih dopisanih kandidatov, sva med analiziranimi glasovnicami na evropskih volitvah dve leti kasneje našli le eno tako glasovnico: »Sosedov Jože, samohranilec z minimalno plačo in dvema šoloobveznima otrokoma«.

Dopisano besedilo, dodane risbe oziroma čačke

Med analiziranimi neveljavnimi glasovnicami je bilo več (5,5 %) takih, ki so imele dopisano besedilo, dodano risbo ali čačko oziroma kombinacijo teh elementov. Kot smo videli, so nekateri avtorji za take glasovnice rekli, da razkrivajo pomembno protestno politiko volivcev, saj pogosto izražajo nezaupanje oziroma nezadovoljstvo s politiko, politiki, sistemom. Analiza te kategorije neveljavnih glasovnic razkriva heterogenost motivov, repertoarjev in naracije tovrstne protestne politike, ki se giblje od izražanja (sorazmerno) nevtralnih do negativnih oziroma jeznih in ciničnih občutkov, pa tudi vulgarnih izrazov. Analiza neveljavnih glasovnic za volitve v Evropski parlament leta 2019 je pokazala, da je izmed teh kategorij še najmanj izražanja (sorazmerno) nevtralnih občutkov, na primer: »najboljši – naj bo pošten Slovenija je samo ena«; »pazimo, da ne bomo brez kruha«; »none of the above«; »neveljavno«; »vedno volim napačnega«; »obljuba velika zguba«; »vsi navedeni nimajo mojega zaupanja«; »bolši jutri«; »Ko je ljudem dejal, naj ljubijo svojega bližnjega, so imeli polne trebuhe. Danes so stvari drugačne. Brecht«; »Proxy vote« (na prazni glasovnici po pošti); narisana slika igre »križci in krožci«; »Stoka!« (dodana slika smeška).

Bistveno več je bilo izražanja jeznih, kritičnih (pri teh dveh kategorijah je bila jeza oziroma kritika volivcev pogosto podkrepljena z dodanimi klicaji), tudi vulgarnih misli o kandidatih, njihovi ponudbi, politiki in politikih na splošno. Ko pogledamo te jezne, kritične oziroma vulgarne narative, vidimo, da so mnogi podobni tistim, izraženim na predsedniških volitvah leta 2017. Nekaj takih že znanih primerov izrazov jeze oziroma kritike: »Mafija!!«; »Lopovi«; »Barabe«;

⁷ Zaradi varovanja zasebnosti konkretnih imen ne navajamo.

»Sama banda«; »Bedaki!«; »Nobeden!!«; »Ne!«, »nihče od naštetih!«; »neveljavna glasovnica!«; »Banda lopovska!« V kar nekaj primerih so bile vidne navezave na specifično raven volitev ali nekatere kritike, pogosto prisotne v javnosti, o visokih prejemkih v evropskem prostoru: »Cigani evropski«; »Lenuhi paraziti samo za denar jim je«; »Požeruhi ste vsi!«; »Lopovi slovenski zanima vas veliki denar od delavcev moja 600 E plače«; »Pohlepneži«; »Vsi voluharji so zbrani!!!!«; »KO-RITARJI; ki jim je glavni cilj visoka plača ter lastna blaginja in ne SLOVENIJE!«; »dejte delat ne afne guncat 80000 socialcem vzemte, ukinte podporo, delat« (zadnje tri besede podčrtano); »25000 EUR 530 penzije«; »Sami ljubitelji evrov!«; »Vsi kandirajo za svoj žep! Lepa plača!«

Pri nekaterih glasovnicah je moč videti kombinacijo izražanja jeze oziroma kritike z besedilom in risbo, na primer besedilo »vsi ste«, zraven pa slika dveh pujsov.

Nekatera besedila pa razkrivajo bolj usmerjeno kritiko ali razočaranje nad ponujenimi kandidati na volitvah; npr.: »Kaj si dobrega storil-a za nas Slovence (Slovence podčrtano) – do sedaj«; »Žal nihče od vas ni vreden zaupanja!!!!«; »Ni primerneга kandidata! Zato nisem glasoval!«; »Noben kandidat ni izpolnil mojih pričakovanj!!!!«; »Nobeden si ne zasluži!«; »Mojega glasu si niso zaslužili«; »hvala nihče ni vreden zaupanja«; »Nobeden ni sposoben niti za sebe kaj šele za druge odločat!«; »Noben kandidat ni primeren«. Občasno pa je bilo moč videti tudi izražanje kritike sistema, npr.: »sistem nam laže«; »Nisem za EU!!!!«.

Med vulgarnimi narativi (ki jih sicer ni bilo veliko) znova izstopajo taki, ki so v kombinaciji s penisom (narisan, napisana beseda, tekst, ki jih vključuje).

SKLEP

Naša študija neveljavnih glasovnic je – za razliko od mnogih, ki so bile opravljene v tujini – kvalitativna študija, ki jo zaradi določenih omejitev lahko opišemo kot eksploratorno, a je ponudila številne uvide v kvalitativno značilnost neveljavnih glasovnic v Sloveniji.

Kvalitativna analiza približno petine od vseh neveljavnih glasovnic na volitvah v Evropski parlament leta 2019 je pokazala določeno raven nezaupanja, zlasti pa nezadovoljstva oziroma izražanja protestne politike volivcev, saj v kategorijo močnejšega izražanja protesta lahko umestimo približno 25 % analiziranih neveljavnih glasovnic (prečrtanih glasovnic, takih, ki so imele dopisane kandidate ali dodano besedilo oziroma risbo oziroma čačko). Uporabljeni repertoarji oziroma narativi volivcev razkrivajo vrsto protesta: nezaupanje oziroma nezadovoljstvo nad ponujenimi kandidati, a očitno zlasti jezo, kritiko politike ali/in politikov ter njihovega delovanja, pa tudi sistema. Ne pa tudi kritike demokracije kot oblike vladavine. V tem pogledu so imeli volivci podobna občutja tudi na predsedniških volitvah leta 2017, čeprav je bilo na slednjih moč zaznati večjo stopnjo protestne politike ter tudi širši diapazon repertoarjev in narativov izražanja protesta s pomočjo neveljavnih glasovnic. Vidimo pa še, da je bila na volitvah v Evropski parlament prisotna tudi šibkejša oblika protesta; v

to kategorijo lahko umestimo manj kot 10 % popolnoma praznih analiziranih neveljavnih glasovnic.

Naše ugotovitve, zlasti v kontekstu rezultata posvetovalnega referenduma junija 2024 o uvedbi možnosti oddaje preferenčnega glasu na volitvah v državni zbor (tako kot je ta možnost dana na volitvah v Evropski parlament), ponujajo tudi neke širše razmisleke oziroma opozorila, če do te uvedbe pride. Analizirane neveljavne glasovnice so na evropskih volitvah namreč pokazale, da je približno 10 % volivcev dosledno obkrožilo enega kandidata iz vsake od list (skoraj 60 % pa je obkrožilo več kandidatov). To kaže na veliko možnost neznanja ali zmote volivcev. Tako bi bilo ob uvedbi možnosti oddaje preferenčnega glasu tudi na volitvah v državni zbor potrebno povečano izobraževanje oziroma komunikacijska strategija (verjetno Državne volilne komisije, ki bi za to seveda morala prejeti tudi potrebne dodatne vire) in obveščanje volivcev o: a) spremembi strukture glasovnice; b) tem, kako oddati veljavno glasovnico. Bistveno višja volilna udeležba na volitvah v Evropski parlament leta 2024, kot je bila na predhodnih volitvah v to predstavniško telo, je verjetno povzročila tudi, da so se nekateri volivci prvič soočili z bolj kompleksno strukturo glasovnice, kot jim je poznana s predsedniških ali parlamentarnih volitev (na katerih je stopnja volilne udeležbe praviloma pomembno višja). To je lahko tudi ena od razlag povečanega deleža neveljavnih glasovnic v primerjavi s predhodnimi evropskimi volitvami (a ta vseeno bistveno ne odstopa od deleža neveljavnih glasovnic v obdobju 2004–2014).

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DISTRUST, DISCONTENT OR LACK OF KNOWLEDGE? QUALITATIVE ANALYSIS OF INVALID BALLOTS IN ELECTIONS TO THE EUROPEAN PARLIAMENT

Abstract. *Although what is an invalid ballot is understood in different ways in various studies, to an important extent an invalid ballot is also seen as a way of expressing voter protest. Qualitative analysis of invalid ballots at elections to the European Parliament in Slovenia reveals that voters also used them to express protest. In-depth analysis of the repertoires and narratives used shows particular distrust or dissatisfaction with the candidates on offer at the elections, and to an even greater extent anger, criticism regarding the system, politics and/or politicians and their attitudes. To a significantly smaller extent, these ballots were used to express criticism of democracy as a system. In this respect, the qualitative analysis of invalid ballots at European Parliament elections confirms several previous findings. However, certain data also point to the lack of knowledge or mistakes by voters while submitting a ballot with a more complex structure.*

Keywords: *invalid ballot, protest, elections, distrust, discontent, European Parliament, Slovenia.*

Marko LOVEC*

SLOVENIAN ATTITUDE TO THE WAR IN UKRAINE: POLITICAL IDEOLOGIES, PUBLIC OPINION AND POLICY COSTS**

***Abstract.** The purpose of this article is to explain the position held by Slovenia with respect to the war in Ukraine. The article draws on literature that stresses the importance of supply-side ideologies in explaining variations beyond the role of the international system, notably populism, Euroscepticism, radical ideologies and government–opposition dynamics, as opposed to demand-side attitudes and policy implications. Among post-socialist small countries, the stronger role of anti-systemic and anti-establishment actors and attitudes, together with the potentially stronger negative effects of war, make differences in positions more likely. Empirical study of the first 2 years of the war shows that the ideologies of the actors play a key role in explaining attitudes. Populist, Eurosceptic and far-right actors tend to be more pro-Russian, while differences exist among left-wing actors. However, anti-establishment sentiment mainly affected the dynamics between government and opposition, whereas the electoral performance of anti-system actors remained low, as can be explained by the still relatively pro-system attitude of the public and the war's limited impact.*

***Keywords:** Slovenia, Ukraine war, ideology, political parties, public opinion.*

INTRODUCTION: LOOKING AT THE RUSSIA'S WAR ON UKRAINE WAR FROM OUTSIDE WESTERN EUROPE

Russia's invasion of Ukraine has called the international post-war order and European security architecture into question. Although the governments of European countries and EU member states are in a similar situation from the international system perspective (Martill and Sus 2024), they have not reacted in the same way due to different agendas pursued by government and opposition

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actors (Hooghe et al. 2024; Holesh et al. 2024; Schramm and Weiser 2024) as well as different public attitudes (Fernández et al. 2023; Stolle, 2024) and effects of the war (Bøggild et al. 2024). Previous research has largely focused on Western (Holesch 2024; Wurthmann and Wagner 2024) and bigger member states (Kapp and Fix 2024), leaving many Eastern and smaller member states neglected or studied only from a certain perspective (Kaniok and Hloušek 2023; Müller and Slominski 2024). The purpose of this article is to review general arguments found in the literature on the little-researched case of Slovenia. The article aims to expand the list of cases considered in the emerging literature and support further research on Central and Eastern European (CEE) countries.

According to the literature, supply-side ideology, especially anti-systemic ideologies like populism, Euroscepticism, radical ideologies, and opposition–government dynamics, is key to explaining differences in countries’ attitudes to the Ukraine war that go beyond the role of the international system (Hooghe et al. 2024; Stolle 2024; Fagerholm 2024). In comparison, demand-side factors such as public opinion and policy output variables like the impact of the war are considered less important (Hooghe et al. 2024). When it comes to small post-socialist CEE countries, the stronger role of anti-systemic and anti-establishment actors (Szczerbiak and Taggart 2024) and attitudes (Lovec 2019) along with the potentially stronger impact of the war (Mátyás 2024) may lead to more differentiated and pro-Russian attitudes.

The empirical study conducted for this research includes the positions of the main political parties on the supply side, opinion polls on the demand side and impact assessments on the output side, in the period between February 2022 and November 2024. The study shows that the ideologies of political actors have a valuable role in explaining attitudes. Populist, Eurosceptic, far-right and ‘old left’ actors tend to be pro-Russian, in line with the literature. In contrast, anti-establishment sentiment in the population has mostly affected the government–opposition dynamics since the electoral performance of anti-system and anti-establishment actors has remained low, a situation that can be explained by the relatively pro-system public opinion and limited impact of the war in the country.

Below, the literature, argumentation and case selection are presented, followed by a discussion of the results of the investigation of supply, demand and output variables. In the conclusion, the theoretical and practical relevance of the results is outlined.

SUPPLY, DEMAND AND THE IMPACT OF POLICY IN A POST-SOCIALIST SETTING

Russia’s invasion of Ukraine on 22 February 2022 was a big shock for the international order and the security architecture in Europe. Although European countries are today in a similar situation with regard to the international system, considerable differences have been seen in how they view the war. One-third

of European countries have opposed at least one of the measures to support Ukraine, such as military support, financial aid and EU membership (Hooghe et al. 2024). Such differences depend on external factors like the (perceived) threat from Russia (Hooghe et al. 2024), proximity and existing relations (Stolle 2024), foreign policy stance and geopolitics (Kapp and Fix 2024; Martill and Sus 2024), and domestic factors such as the ideology and perceptions of political parties and the electorate (Hooghe et al. 2024; Fagerholm 2024; Holesch et al. 2024; Stolle 2024; Bøggild et al. 2024) coupled with the dynamics of party competition (Wurthmann and Wagner 2024; Stolle 2024). Finally, attitudes are also influenced by the direct costs of the war, such as higher energy prices (Stolle 2024; Bøggild et al. 2024).

The *supply side ideology* and, in particular, party ideology – understood as a coherent bundle of ideas that serve certain interests – have been identified as the most important factor in explaining attitudes to Russia's war on Ukraine (Hooghe et al. 2024; Stolle 2024). The importance ascribed to party ideology is consistent with the long-observed trend towards the democratisation and politicisation of foreign policy (Hooghe et al. 2024).

While the traditional divide between the political left and right does not play a clear role (Stolle 2024), anti-establishment and anti-system ideologies such as populism and EU scepticism (Hooghe et al. 2024; Fagerholm 2024) have been shown to be strongly associated with more pro-Russian attitudes. At the same time, when in government, many populist and EU-sceptic parties held moderate pro-Ukrainian positions (Hooghe et al. 2024). This points to the international system's role as well as the different roles of government and opposition. The weaknesses of democratic institutions, such as low trust in established institutions and strong polarisation, affect government–opposition dynamics by promoting less centrist and less system-friendly positions. Indeed, most countries with lower support for Ukraine exhibit greater polarisation between supporters of the incumbent party and the opposition party (Stolle 2024).

While both the far-right and far-left variants of populism are characterised by more pro-Russian positions, a clear correlation between EU scepticism and sympathy for Russia has only been found for far-right parties (Fagerholm 2024; Wurthmann and Wagner 2024).¹ On the left side of the political spectrum, there is a split between (a) the new left parties and the left parties from Northern Europe, and (b) the old left parties and the left parties from Eastern Europe, with the former being more critical and the latter more sympathetic towards Russia.² Studies of parties in the European Parliament established a difference between

¹ The correlation between far-right EU scepticism and more pro-Russian positions can be explained by ideological characteristics these parties share with the Russian regime, such as nationalism, conservatism and authoritarianism.

² One possible explanation for this is the more sympathetic attitude of the old left and the left parties from Eastern Europe towards Russia, a successor of the Soviet Union and its anti-Western and communist ideology.

the traditional communist parties, which are more friendly to Russia, and the new left and democratic socialists, whose criticism of Russia has grown significantly (before the war, these parties were the least assertive towards Russia) (Holesch et al. 2024). Similar results were found for Germany (Wurthmann and Wagner 2024).

On the *demand side*, public opinion studies have shown that the war has, to some extent, increased support for liberal internationalism and its features like democracy, solidarity (redistribution), the European Union and even immigration, whereas authoritarian attitudes have declined (Steiner et al. 2023; Klymak and Vlandas 2024; Panchuk 2024). However, researchers also argue that the war has (temporarily) reinforced these trends rather than fundamentally changing the underlying attitudinal tendencies (Fernández et al. 2023). There is also a need for more longitudinal research.

Finally, previous research has revealed that support for Ukraine has not necessarily decreased because of economic concerns influencing *policy output*, but depends on the rhetoric and attitudes of national elites explaining the costs from the perspective of threats to democracy, international order etc. (Wurthmann and Wagner 2024; Bøggild et al. 2024). Nevertheless, the research has focused on wealthy Northern European countries like Germany and Denmark, and thus further research is needed to account for different national circumstances.

Research on CEE countries has looked at specific factors and individual cases, e.g., the international system, as with the case of Poland (Kapp and Fix 2024), on the long-term ideological motivations of political parties, as with the case of the Czech Republic (Kaniok and Hloušek 2023) and, with respect to Hungary, on the instrumentalisation of EU foreign policy to achieve gains in EU domestic policy through links between the EU's rule-of-law agenda and support for the Ukraine war packages (Müller and Slominski 2024). Meanwhile, broader patterns among the region remain unexplored in the emerging literature.

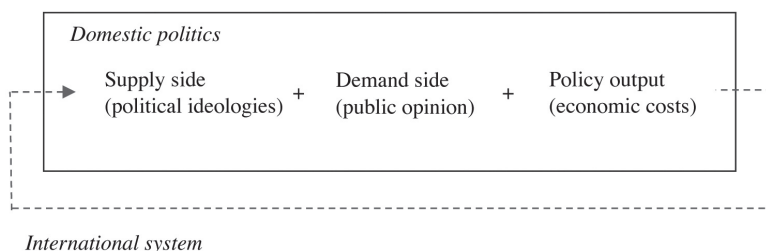
While the attitudes of individual CEE countries have been strongly influenced by their proximity to Russia and past relations (Poland and the Baltic countries) or the ruling regime's direct links to Moscow (Hungary), other countries such as the Czech Republic, Slovakia and Slovenia provide another opportunity to examine the role of regional context in determining the impact of supply-side ideology, demand side public attitudes and policy output variables in line with the mentioned literature.

Small post-socialist CEE countries are characterised by greater dependence on the international system and less resilience to international crises. Populist, Eurosceptic and radical actors and attitudes play a bigger role in these countries and in some cases are important state actors (Stanley 2017; Szczerbiak and Taggart 2024). Institutional problems like a low level of trust in established institutions and a high degree of polarisation limit the legitimacy of state actors (Gessler and Wunsch 2025). These countries' lower level of development and greater dependence on international trade and investment make them more

susceptible to external shocks (Arriola et al. 2023). One can therefore assume that a stronger role of anti-systemic and anti-establishment actors and attitudes as well as possibly stronger effects of the war will lead to bigger differences in terms of a stronger pro-Russian stance in the region.

The focus of this study is on Slovenia. It is a small post-socialist country and an open economy with a strong multilateral and EU-friendly orientation and good relations with all major powers, including Russia (Bojinović Fenko and Šabič 2014; 2017; Bojinović Fenko and Kočan 2022; 2023). The global and EU crises of the last decade and a half have led to declining support for domestic institutions and the EU (Lovec 2019) and brought considerable political instability (Fink Hafner 2024a; 2024b) as well as a shift in the traditional pro-EU orientation of the elites and the politicising of EU (Lovec and Bojinović Fenko 2020; Lovec, Kočan and Mahmutović 2022; Lajh and Novak 2024). The Slovenian Democratic Party (SDS), the main centre-right party led by Janez Janša, has moved towards conservatism and nationalism and occasionally espouses soft Euroscepticism. During his third government (2020–2022), Janša employed polarising rhetoric and tried to interfere in independent institutions (Mahmutović and Lovec 2024). The centre-left side of the political spectrum has been characterised by instability and the emergence of new radical left-wing actors such as Levica opposed to NATO and the EU's economic governance.

Picture 1: MODEL EXPLAINING THE ATTITUDE TOWARDS THE RUSSIA'S WAR ON UKRAINE



Source: own elaboration.

In the following, we look at supply-side variables – the positions of the main political parties on the Ukraine war and their performance at the 2022 parliamentary elections and 2024 European Parliament elections; demand-side variables – public attitudes regarding political actors and the Ukraine war based on European and national polls; and output variables based on available economic impact analyses and data (Scheme 1). We focus on the period between February 2022, when Russia invaded Ukraine, and November 2024, when Donald Trump won the US elections and the strategic calculus shifted towards a quick end to the war.

SUPPLY SIDE: PRO-RUSSIAN ATTITUDES OF FAR-RIGHT, POPULIST AND EUROSCEPTIC ACTORS WITH POOR ELECTION RESULTS

The study of the supply side shows the importance of ideological features such as the 'hawkish westernism' of Janša's SDS and the 'defensive normativism' of Robert Golob's Freedom Movement, the two dominant parties in the period under observation, which can explain the variations in the attitudes of governments beyond the role of the international system. In line with other similar studies (Hooghe et al. 2024; Fagerholm 2024; Holesch 2024), populist and Eurosceptic parties on the hard right tend to be pro-Russian, while greater differences exist between old and new left actors, with the former being more pro-Russian. Second, the electoral defeats of the ruling parties reveal the role of anti-establishment, anti-system and polarised rhetoric in favour of the opposition parties, whereas the electoral results of the anti-system and anti-establishment parties remained low. Faced with dwindling support, the governing parties turned to more ideological positions, which did not prevent the mobilization of support for the opposition (in the case of the SDS in the 2022 parliamentary elections) or the demotivation of centrist voters (in the case of the Freedom Movement and the 2024 European elections).

In domestic political debates, foreign policy towards the Russian Federation was not very important before the war. After Russia started to pursue a more assertive foreign policy at the end of the 2000s, Janša's SDS, the liberal-conservative reform party at the time, became more cautious about strategic cooperation with Russia (Crnčec and Bojinović Fenko 2022). Later, these reservations continued, albeit Janša's SDS turned to nationalism and conservatism and established close relations with the pro-Moscow regime of Victor Orban in Hungary, as reflected in Janša's criticism of Putin's visit to Slovenia in 2016, 2 years after Russia's annexation of Crimea. During the COVID-19 pandemic, Janša's government was reluctant to engage in vaccine diplomacy with Russia (or China). In contrast, right-wing populist and Eurosceptic parties such as the Slovenian National Party (SNS) or the Party of the Slovenian Nation were openly Russia-friendly, as they saw Russia's nationalist and conservative regime as a counterweight to 'Western globalism', 'Brussels' dictates' and 'cultural progressivism' and advocated closer relations with Russia (Lovec, Kočan and Mahmutović 2022). Compared to centre-right parties, the centre-left parties were more open to friendly relations with Russia, even if they had reservations on a strategic level due to the repression of democratic forces in Russia and Russia's support for illiberal and authoritarian regimes in Europe. While parties close to the old left, such as DeSUS, were in favour of closer cooperation with the Russian regime, since they saw Russia as the largest Slavic state and a counterweight to US hegemony, new left parties like Levica, despite their opposition to NATO, did not hold a particularly positive attitude to the Russian regime as their progressive ideology contradicted Russian authoritarianism, nationalism and neoconservatism.

After Russia's invasion of Ukraine in February 2022, Janša, who had little support at home during his third term in office due to his handling of the COVID-19 pandemic and interference in the media and civil society, became one of Ukraine's most vocal supporters. Janša used nationalist rhetoric, drew parallels with the Slovenian War of Independence and called for greater Western involvement (Government of Slovenia 2022a). He was one of the first Western politicians to visit Kyiv. Janša's position diverted attention away from his interference with the rule of law and saw him gain positive coverage in the international media (Mortensen et al. 2022). Janša probably also hoped to use the more reserved support for NATO and interventionism and the more positive attitude of centre-left actors regarding Russia to portray them as pro-Russian/anti-Western or to create a split between the centre-left parties. The centre-left opposition parties were critical of what they called Janša's "militant stance", but also condemned the Russian aggression as a violation of international norms and rules (N.D. 2022; G.K. 2022). At the same time, in the electoral campaign they focused more on Janša's interference in domestic institutions and his handling of the COVID-19 pandemic. At the April 2022 elections, Janša's SDS won the centre-right vote but failed to find a potential coalition partner, while the centre-left saw the strong mobilisation and concentration of the electorate on the newly established progressive-liberal Freedom Movement led by Robert Golob (Lovec 2023; Novak 2025). Voter turnout was the highest in two decades (70.97%) (DVK 2022). The Freedom Movement won the election in a landslide (34.45%, 41 seats), followed by Janša's SDS (23.48%, 27 seats), the New Slovenia – NSi (6.86%, 8 seats), the Social Democrats – SD (6.69%, 7 seats) and the Left (4.46%, 5 seats) (DVK 2022).

Populist and Eurosceptic parties on the hard right such as Resnica, the SNS and the Homeland League took an openly pro-Russian stance, while the softer Eurosceptic and anti-NATO party Levica condemned Russia's aggression and Western interference (G.K. 2022; Al. Ma., La. Da. 2022). Resnica achieved 2.86%, the SNS 1.49% and the Homeland League 0.18% (DVK 2022).

The Golob government (2022-), made up of the Freedom Movement, the SD and Levica, invoked compliance with international rules and norms such as respect for the UN charter, the non-use of means of aggression and respect for territorial integrity and continued to support Ukraine consistent with the policies of the majority of EU and NATO members (Volk 2022; 2024; Brglez 2022). Members of the Golob cabinet visited Ukraine several times, especially in the first year of the conflict (Table 1). Slovenia's donations to Ukraine placed the country around the EU average (Trebesch et al. 2024).³

³ Slovenian aid amounted to 0.4 of national GDP in the period from January 2022 to June 2024, of which 0.1% was bilateral aid and 0.3% multilateral aid (data extracted from Trebesch et al., 2024). Military aid accounted for 0.14% of national GDP. It consisted of 13 packages provided over the course of 2022, 2023 and 2024, some of which were already agreed during Janša's term of office. In the period from 24.2.2022–31.10.2023, Slovenia made it into the top 10 military donors in terms of the share of

Important visits and support measures by the Golob government were questioned by »pacifist« civil society groups, including prominent figures of the old left such as former presidents, academics and opinion-makers who blamed Western interference for the war and spoke out against military aid and in favour of peace negotiations (Table 2, see also Bebler 2023).

Table 1: VISITS BY SLOVENIAN POLITICAL REPRESENTATIVES TO UKRAINE

15. 3. 2022	Janez Janša visits Kyiv together with Polish Prime Minister Mateusz Morawiecki and Czech Prime Minister Petr Fiala	Janša expresses strong support, says Western diplomats have fled, draws a comparison with the Slovenian War of Independence, says Russia cannot take Kiev, calls for a no-fly zone (Government of Slovenia, 2022a)
27. 7. 2022	Foreign Minister Tanja Fajon visits Kyiv	The total amount of NGO and state donations to date estimated at €8.8 million. Fajon calls for an end to the war as soon as possible and emphasises humanitarian issues. On her return, she discusses the attempts made on social media to justify the aggression. (Government of the Slovenia 2022b)
28. 11. 2022	Defence Minister Marjan Šarec visits Kyiv	Šarec expresses support for the liberation of Ukraine. To date, military support has included 35 infantry amphibious vehicles and 22 updated M55(S) tanks. Slovenia joins the EU Assistance Mission in Ukraine. (Government of the Slovenia 2022c)
27. 3. 2023	Opposition leader Janez Janša meets Ukrainian PM Denis Šmihal in Kyiv.	Janša describes western support as »Too little and too late.« (Al. Ma., G.C., MMC 2023)
31. 3. 2023	Prime Minister Robert Golob, together with Croatian Prime Minister Andrej Plenković, Slovakian Prime Minister Eduard Heger and Moldovan President Maia Sandu, visits Kyiv.	EU and NATO accession, post-war reconstruction and humanitarian aid discussed. Golob promised Ukraine support by all means in times of aggression. (Government of the Slovenia 2023)
2. 10. 2023	Fajon participates at an informal meeting of EU foreign ministers in Kiev.	
28. 6. 2024	President of the State Nataša Pirc Musar visits Kiev	Pirc Musar expresses political support, support by all means in times of Russian aggression and confirms Slovenia's commitment to the territorial integrity of Ukraine. Signing of the bilateral security agreement is delayed. (President of Slovenia, 2024)

Source: own elaboration (for data sources see references within the table).

donated heavy armour by donating 12% of its stock of heavy armour: 35 M80A (estimated value USD 25 million), 28 modernised T55 (estimated value USD 27 million) and 20 Valuk infantry fighting vehicles (A.Ž. 2024).

Table 2: INFLUENTIAL OPEN LETTERS AND PETITIONS

10. 6. 2022	An open letter to the government first signed by former presidents of the state Milan Kučan and Danilo Turk	The constitutional principle of peace policy, a culture of peace and non-violence, is referred to in the government coalition agreement. Against arms deliveries to Ukraine. The government should look for alternative ways to end the war. (G.C., AL. Ma., MMC, 2022)
13. 6. 2022	An open letter to the government entitled Ukrainian resistance must be supported by all means, first signed Luka Lisjak Gabrijelčič	A reply to the letter of 10.6., Slovenia should support the Ukrainian resistance by all means (G.C., AL. Ma., MMC, 2022)
19. 10. 2022	An open letter to government of Slovenia on war in Ukraine, first signed Spomenka Hribar and Aurelio Juri	Against uncritical loyalty to the USA. Reference to Article 124 of the Constitution on peaceful foreign policy. (Hribar and Juri, 2022)
16. 2. 2023	An open letter with the title Stop the war in Ukraine, the first signatories are Kučan and Turk	For a peaceful solution based on sovereignty, equality and security interests, including those of Russia (Dnevnik, 2023)
13. 7. 2023	An open letter to the state leadership, first signed by Aurelio Juri	Against the admission of Ukraine to NATO, which is counterproductive for ending the war (Juri, 2023)
19. 7. 2024	An open letter entitled Against war agitation and financing of a new war, first signed by Igor Ž. Žagar	A proxy war between the USA, the EU under the umbrella of NATO and the Russian Federation, which they were unable to defeat in the Cold War. (Žagar et al., 2024)

Source: own elaboration (for data sources see references within the table).

In the second year of the conflict, the frequency of visits and support actions decreased against the backdrop of protracted conflict and falling support for the government, as did the activities of civil society, which were now focused on the war in Gaza (Rizman et al. 2024; Veber 2024), but also used the atrocities in Gaza to highlight the West's alleged double standards and to reinforce the call for an end to the war in Ukraine through a negotiated agreement with Russia. Under pressure from civil society (Mladina 2024) and the left-wing part of the coalition, the Golob government decided a few weeks before the elections to recognise the independence of Palestine as Israel had repeatedly violated international law on a massive scale (Government of Slovenia 2024a).⁴ Janša's SDS criticised the recognition of Palestine as an "act of support for terrorism" and part of "the leftist internationalist agenda", along with pacifist policy on Ukraine and (Brussels') pro-migration policy and green transition agenda (Al. Ma. G.K. 2024; Kočan and Lovec 2025).

⁴ The bilateral security agreement between Slovenia and Ukraine (Government of the Slovenia 2024b) was only signed at the third attempt on 19 July 2024 by Golob and Zelenski on the sidelines of the EPC meeting.

European elections were characterised by the mobilisation of some left-wing voters, but fell short of the broad mobilisation at the national elections, and the fragmentation of the centre-left vote, in contrast to the more concentrated support for Janša's SDS in the centre-right (Novak 2024; Kočan and Lovec 2025). Voter turnout was 41.8% (over 10 percentage points more than at the last European election) (DVK 2024). The mobilisation was relatively low in active and younger parts of the population as shown by the low turnout in the 31–45 (32.24%) and 18–30 (35.27%) age groups, as opposed to 60+ (49.6%) and 46–60 (41.94%) (DVK 2024). The elections were won by the SDS-EPP (30.59%, 4 seats), followed by the Freedom Movement – RE (22.11%, 2 seats), Vesna-Greens (10.53%, 1 seat), SD-S&D (7.76%, 1 seat) and NSi-EPP (7.68%, 1 seat) (DVK 2024). Levica failed to clear the threshold to enter parliament (4.81%), as did Resnica (3.97%), DeSUS (2.22%) and Nič od naštetega (1.52%) (DVK 2024), which had challenged the Western agenda concerning the Ukraine war.

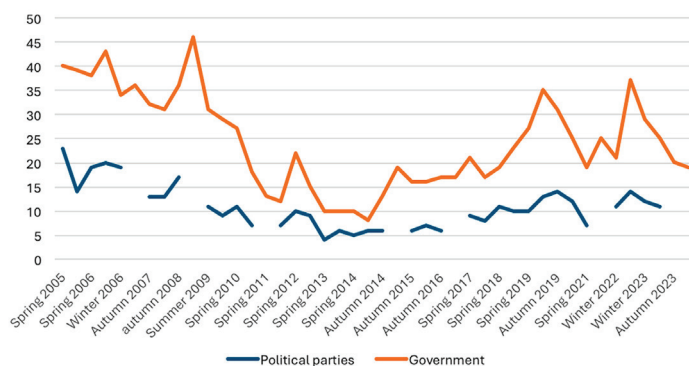
DEMAND SIDE: ANTI-ESTABLISHMENT, BUT STILL LARGELY PRO-SYSTEM ATTITUDES THAT MAINLY INFLUENCE THE GOVERNMENT–OPPOSITION DYNAMICS

Investigation of the demand side shows that international developments such as protracted crises place a certain strain on support for state actors. As public opinion was still relatively pro-system and the perceived costs of the war were limited, anti-establishment attitudes largely affected the dynamics of government and opposition. A correlation between decreasing perceived direct costs of the war and decreasing support for Ukraine shows the stronger role of political attitudes as opposed to economic costs, while the correlation between decreasing support for governments and individual policies – in the context of relatively stable overall attitudes towards the Russia's war on Ukraine – shows the importance of general support for the government, the quality of democracy and the dynamics of government and opposition.

Opinion polls reveal that international crises have significantly undermined confidence in the government and political parties, favouring anti-establishment, anti-system and opposition forces. Crises like the global financial crisis (GFC) (2007–2008), eurozone crisis (2011–2012), migration crisis (2015–2016), the pandemic (2020–2021) and the war in Ukraine (2022–) were accompanied by declining trust in the government and political parties (Figure 1). National parliamentary elections and changes in government (2008, 2012, 2014, 2019, 2022) were generally followed by a sharp rise in trust in the government and political parties, followed by a sharp decline corresponding to the impact of the ongoing externally induced crisis. Moreover, there is a notable difference between (a) the GFC and the Eurozone crisis on one hand, and (b) the migration, pandemic and Eurozone crises on the other, with the former denoted by a negative and the latter by a positive trend in trust, as may be explained by the growing role of the politicisation of international issues, anti-establishment and anti-system forces

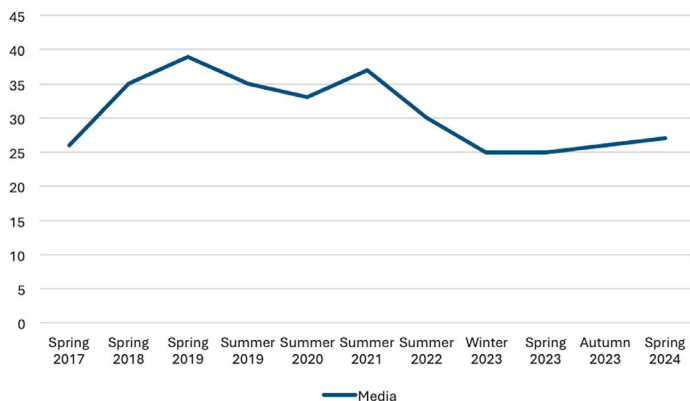
in the latter period (Lovec, Kočan and Mahmutović 2022; Novak and Lajh 2024). However, as the governments and political parties continued to face strong fluctuations in trust, the impact of the crises on the government–opposition dynamics was more significant. External shocks also had a negative impact on other institutions like the media (Figure 2), which indicate greater polarisation with the latter being closely related to the fragmentation of public space (Mahmutović and Lovec 2024).⁵

Figure 1: SHARE OF RESPONDENTS WHO TRUST POLITICAL PARTIES AND THE GOVERNMENT IN SLOVENIA



Source: own elaboration based on Eurobarometer 2024a.

Figure 2: SHARE OF RESPONDENTS WHO TRUST THE MEDIA IN SLOVENIA

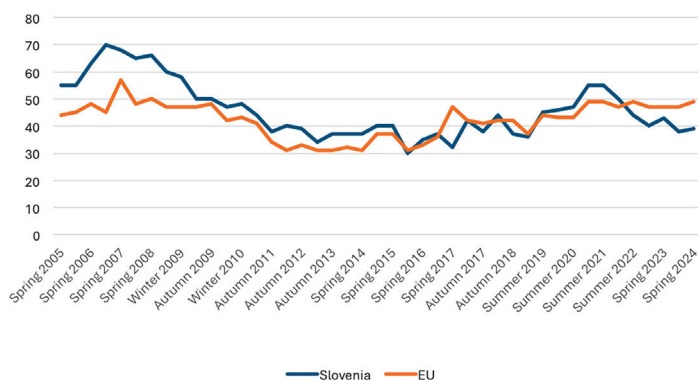


Source: own elaboration based on Eurobarometer 2024b.

⁵ There were several reports of Russian propaganda and fake news especially in the social media. One example of this was news that Russia had offered Slovenia help after the severe floods in Slovenia in the summer of 2023.

Trust in international organisations such as the EU or NATO has not dropped as much as trust in national governments and political parties, indicating that pro-system attitudes remain relatively strong and that people primarily blamed the (ruling) national elites (Figure 3, 4). Against the background of the GFC and the crisis in the eurozone, trust in the EU fell considerably less in Slovenia than the EU average. During the migration crisis and the war in Ukraine, trust in the EU fell more than the EU average, which can be explained by the increasing role of politicisation, anti-systemic and anti-establishment forces, as explained above.⁶ In contrast to trust in the EU, trust in NATO was generally lower in Slovenia. Still, trust in NATO was also quite stable. After an initial slump following the start of the war in Ukraine, trust in NATO has again risen to the level of trust in the EU, following Russia's successes on the front.

Figure 3: SHARE OF RESPONDENTS WHO TRUST THE EU IN SLOVENIA AND THE EU

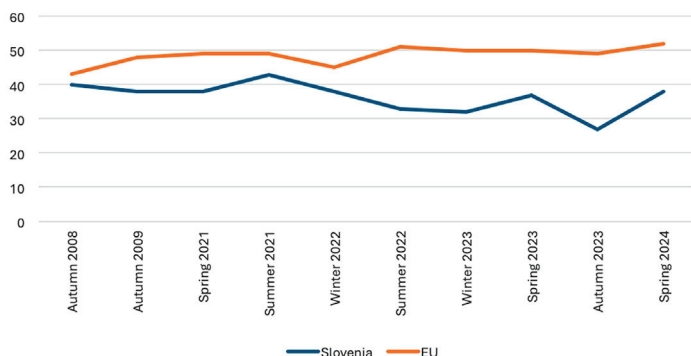


Source: own elaboration based on Eurobarometer 2024c.

The significance of the Ukraine war remained high throughout the entire period (Figure 5). Concerns about the direct effects of the war, such as energy supply and inflation, were replaced by general security concerns in the second and third years. Perceived concern and impact on life decreased from 70% and 45% to below 40% and 20% between March 2022 and March 2024 (Valicon 2024). This suggests that general political attitudes eventually became more important than direct economic costs.

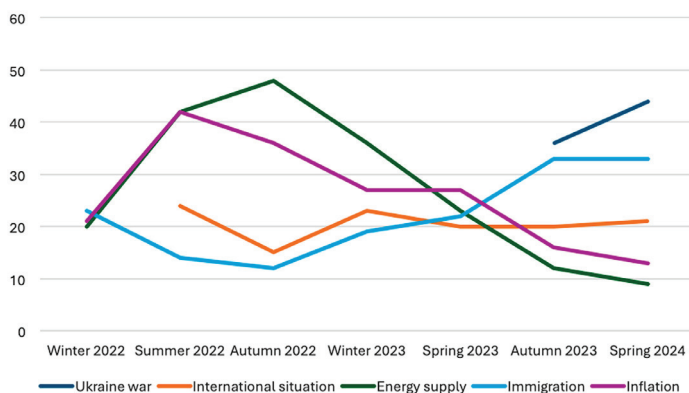
⁶ In contrast to the migration crisis and the war in Ukraine, the COVID-19 pandemic led to increased support for the EU, which can be explained by the EU's better handling of the crisis, the tensions between the EU and the Janša government, and the broad domestic political mobilisation against Janša.

Figure 4: SHARE OF RESPONDENTS WHO TRUST NATO IN SLOVENIA AND THE EU



Source: own elaboration based on Eurobarometer 2024d.

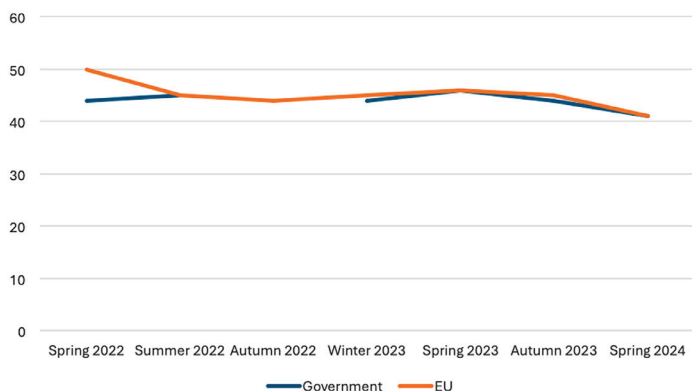
Figure 5: MOST IMPORTANT ISSUES FACING THE EU ACCORDING TO SLOVENIAN RESPONDENTS



Source: own elaboration based on Eurobarometer 2024e.

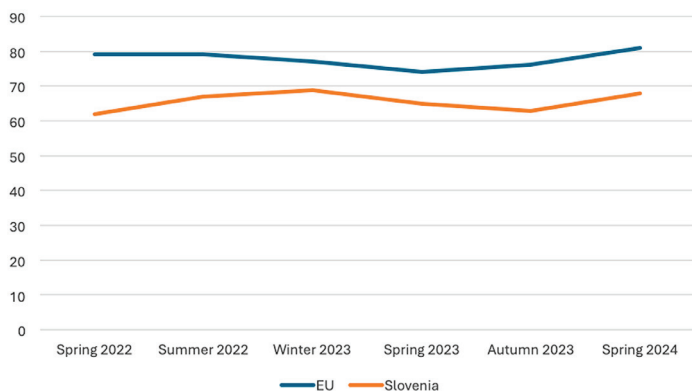
Satisfaction with the national and EU response to the invasion of Ukraine varied slightly during the Janša government and was at the same level during the Golob government (Figure 6), which is consistent with the tougher position of Janša (at the time) and the alignment of the Golob government with EU policy. Most people opposed the Janša government's measures, including his visit to Ukraine (50%), the closure of airspace by NATO and Slovenia (45%), the deployment of weapons (50%) and the return of the Slovenian diplomatic representation (around 50%) (Mediana 2022).

Figure 6: SHARE OF RESPONDENTS WHO ARE SATISFIED WITH THE NATIONAL AND EU RESPONSE TO THE INVASION OF UKRAINE



Source: own elaboration based on Eurobarometer 2024f.

Figure 7: SHARE OF RESPONDENTS IN SLOVENIA WHO AGREE THAT RUSSIA'S INVASION IS A THREAT TO THE SECURITY OF THE EU/SLOVENIA

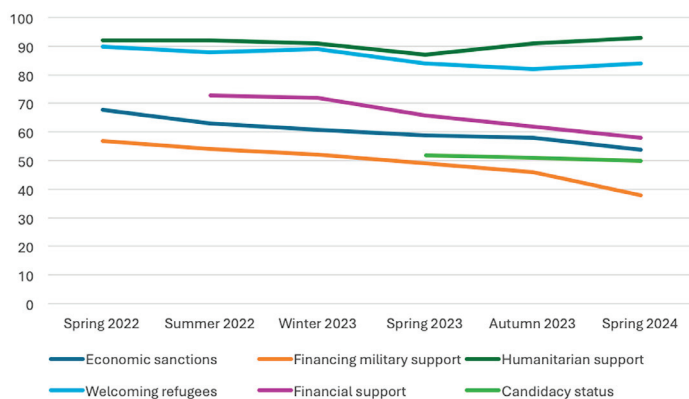


Source: own elaboration based on Eurobarometer 2024g.

Even though the general attitude to Ukraine was somewhat less positive than the EU average, public opinion was firmly on the side of Ukraine and viewed Russia as the perpetrator and a security threat. The protracted conflict led to growing scepticism regarding certain policies, while support for a joint EU response remained strong. In 2022, 44.1% of respondents blamed Russia for the conflict, 34.8% blamed Russia, Ukraine and the West, and 77.2% supported Ukraine (Ninamedia 2022). In another survey, Russia and the USA were blamed

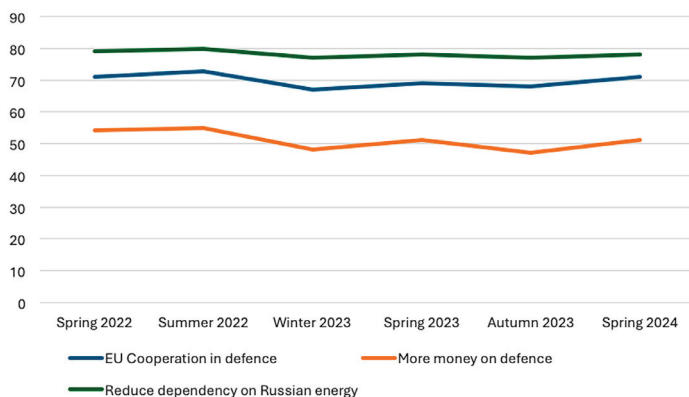
by 70% and 38% in March 2022, 62% and 48% in March 2023, and 66% and 45% in March 2024 (Valicon 2024). Russia's invasion was seen as a threat to the security of the EU by 80% of respondents and two-thirds saw it as a threat to Slovenia's national security (Figure 7). In the second and third years of the conflict, support for financial and military aid to Ukraine and for sanctions fell as these were increasingly a point of criticism of the government policy by the (old left) opposition actors, whereas support for humanitarian aid and aid for refugees remained high (Figure 8). At the same time, the majority of respondents supported the EU's joint response in terms of reducing dependence on Russian energy, greater defence cooperation and increased defence spending (Figure 9).

Figure 8: SUPPORT FOR THE POLICY ON UKRAINE IN SLOVENIA



Source: own elaboration based on Eurobarometer 2024h.

Figure 9: SUPPORT FOR THE EU POLICIES IN SLOVENIA



Source: own elaboration based on Eurobarometer 2024i.

POLICY OUTPUT: LIMITED ECONOMIC COSTS OF WAR

Analysis of policy output relative to the economic costs of the war shows that Slovenia was more economically exposed to the war in Ukraine than the average EU member state. Still, the impact was limited to an increase in energy prices and inflation, especially in the first year of the war.

The Slovenian economy's total direct exposure to the war in Ukraine in terms of trade was estimated at 1.5%–2% of GDP, which places Slovenia in the group of relatively more exposed countries (Arriola et al. 2023; Hribernik 2023). In 2021, Russia accounted for 2.4% of total Slovenian exports and 1% of imports. Exports were particularly sensitive since imports could eventually be replaced by other sources. The most important exports were pharmaceutical and chemical products, while gas and oil accounted for two-thirds of imports. Dependence on Russia and Ukraine was especially high in the area of medical and pharmaceutical products as these two countries accounted for 12.5% of all direct exports (Hribernik 2023). Russia was also the fifth-most important destination country for Slovenian FDI (EUR 468 million, 6.1% of all FDI) and the most important destination country for FDI outside the countries of former Yugoslavia. Russia was among the top ten investors in Slovenia (EUR 515 million, 2.8% of all FDI; mainly in the steel industry, tourism, trade and banking) (Hribernik 2023).

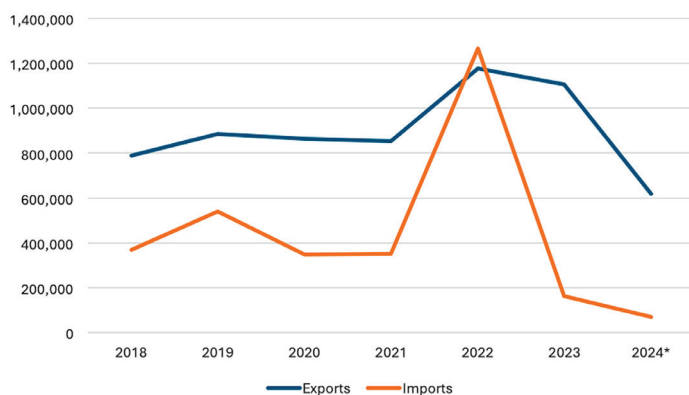
After the beginning of the war, the total value of exports and imports initially rose due to higher prices, re-exports and one-off transactions before the sanctions came into force at the end of 2022/start of 2023. Thereafter, imports decreased, especially of energy commodities, while exports were less affected because some export goods such as pharmaceuticals were exempted from the sanctions (Figure 10).⁷

Slovenia's total energy dependence on Russia before the war was around 18%, namely, below the EU average. Dependence on Russian gas was particularly high, with direct and indirect dependence estimated at over 75% (Eurostat 2023). Gas and electricity prices almost doubled over the course of 2022, reaching a peak in early 2023, followed by a decline. Oil prices also rose by 10%–20%. Annual inflation reached 9% in 2022 and fell to 7% in 2023, with energy prices being one of the biggest drivers alongside other commodities and food prices (SURS 2024b).

The number of EU citizens who fled Ukraine and were under temporary protection in Slovenia in July 2024 amounted to 9,475, putting Slovenia in the group of countries with a share of 0.25%–0.5% of the total population, below the EU average of 0.92% (Eurostat 2024). The immigration of Ukrainian nationals to Slovenia and the granting of protection status was not politicised by political actors and was supported by the public, as shown in the previous section.

⁷ There were some changes in Russian FDI, e.g., the local branch of Sberbank was sold to NLB, while many other companies were not affected and even benefited from government subsidies to compensate for the high energy prices.

Figure 10: BILATERAL TRADE BETWEEN SLOVENIA AND THE RUSSIAN FEDERATION (1000€)



Source: own elaboration based on SURS 2024a. *Provisional data.

CONCLUSION: MORE POLARISED, LESS PRO-UKRAINIAN?

The war in Ukraine was a shock for the international post-war order and European security. However, not all countries reacted in the same way, thus highlighting the role of elements beyond the international system such as the ideologies of political actors, public opinion and the direct costs of the war. The aim of this article was to examine the case of Slovenia in order to better position the post-socialist small countries in CEE in the broader literature. The article builds on the literature that stresses the importance of supply-side political actors' ideologies, notably populism, Euroscepticism, radical ideologies and the dynamics between government and opposition (Hooghe et al. 2024; Stolle 2024; Fagerholm 2024). It was argued that in the context of small transition Eastern EU member states a stronger role of anti-establishment actors and attitudes coupled with stronger negative effects of war can reinforce pro-Russian attitudes.

The results of the empirical study for the period between 2022 and 2024 show that supply-side ideologies play an important role in explaining attitudes. Populist, Eurosceptic and far-right actors were more pro-Russian, while there were divisions between old and new left actors, which is consistent with the literature (Fagerholm 2024; Wurthmann and Wagner 2024; Holesch et al. 2024). The anti-system and polarising rhetoric of political actors largely fed into the government–opposition dynamics as populist and Eurosceptic parties only achieved limited results at the elections in the observed period. Analysis of the demand side showed that international developments like the ongoing crisis fostered anti-establishment, anti-system and polarising sentiments, which mainly impacted government and opposition dynamics against the backdrop of still

predominantly pro-system public attitudes. Finally, analysis of the policy output revealed that, despite the relatively high exposure compared to the average of EU member states, the economic impact was limited on energy prices and inflation.

The results show the particular vulnerability of Slovenia as a small post-socialist transition country to external shocks, which has thus far been reflected chiefly in government–opposition dynamics and less in a growing role of anti-system and anti-establishment actors, even if there are longer-term negative effects on political stability and the stability of the party system (Fink-Hafner 2024a; 2024b) as well as the trend of a growing role of anti-establishment and anti-system ideologies. Nonetheless, a higher level of polarisation may have had an impact on lower support for Ukraine, as also noted in other studies (Stolle 2024). In other CEE countries, the impact of a post-transition setting might be stronger due to more pronounced institutional quality problems and polarisation (Gessler and Wunsch 2025) together with the stronger direct effects of war (Mátyás 2024; Lovec and Mahmutović 2024). While certain developments on the supply and demand side appear to reinforce each other, future studies with more detailed process tracing could help to disentangle the supply- and demand-side effects.

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SLOVENSKI ODNOS DO VOJNE V UKRAJINI: POLITIČNE IDEOLOGIJE, JAVNO MNENJE IN STROŠKI POLITIKE

Povzetek. Namen tega članka je pojasniti slovensko stališče do vojne v Ukrajini. Članek se opira na literaturo, ki poudarja pomen ideologij na strani »ponudbe« pri razlagi variacij, ki presegajo vlogo mednarodnega sistema, zlasti populizma, evroskepticizma, radikalnih ideologij in dinamike med vlado in opozicijo, v nasprotju z odnosom na strani »povpraševanja« in s posledicami politike. V kontekstu postsocialističnih majhnih držav močnejša vloga protisistemskih in populističnih akterjev in odnosov ter potencialno močnejši negativni učinki vojne povečujejo verjetnost diferenciranih stališč. Empirična študija prvih dveh let vojne kaže, da imajo ideologije akterjev ključno vlogo pri razlagi stališč. Populistični, evroskeptični in skrajno desni akterji so ponavadi bolj proruski, medtem ko so med akterji na levi razlike. Vendar pa je antiestablišmentsko razpoloženje vplivalo predvsem na dinamiko med vlado in opozicijo, medtem ko je volilna uspešnost protisistemskih akterjev ostala nizka; to je mogoče pojasniti s še vedno razmeroma prosistemskim odnosom javnosti in omejenim vplivom vojne.

Ključni pojmi: Slovenija, vojna v Ukrajini, ideologija, politične stranke, javno mnenje.

Patrik REBRICA, Vladimir PREBILIČ*

DOKTRINI KIBERNETSKEGA VOJSKOVANJA RUSIJE IN UKRAJINE**

Povzetek. Kibernetško vojskovanje je v sodobne konflikte uvedlo novo dimenzijo, pri čemer so nevarnosti večje kot kdaj prej, saj postajajo cilji kritična infrastruktura, finančni sistemi in osebni podatki. Meje med digitalnim in fizičnim svetom se brišejo, kar povečuje potrebo po učinkoviti kibernetški obrambi. Namen tega članka je preučiti vpliv kibernetškega vojskovanja v rusko-ukrajinski vojni. Razumevanje doktrin in taktik pripomore k boljši nacionalni varnosti, zaščiti civilistov in stabilnosti globalne digitalne infrastrukture, kar omogoča razvoj strategij za zmanjšanje tveganj v prihodnjih konfliktih.

Ključni pojmi: kibernetika, vojskovanje, vojna, doktrina, obramba.

UVOD

Kibernetško vojskovanje je v rusko-ukrajinski vojni odprlo novo fronto bojevanja, ki je ključnega pomena za strokovnjake. Če gledamo ta konflikt zgolj z obrambnega vidika, je analiza uporabljenih taktik in doktrin v konfliktu dragocena lekcija za druge države, ki bi rade okrepile svojo kibernetško obrambo. Države, predvsem članice NATA, so začele zaradi tega konflikta namenjati večjo pozornost svojim kibernetским zmogljivostim (Willet 2022, 7–11).

Internet je spremenil naš pogled na svet in interakcijo z njim na veliko načinov, na žalost ta sprememba ni omejena le na mirnodobne dejavnosti. Ta razvoj vpliva tudi na način bojevanja v vojnah. Zdaj ko je vsaka država povezana in odvisna od interneta za novice, volitve in komuniciranje s svojimi državljani, je pomembno razumeti, kako kibernetško vojskovanje deluje. Vojna v Ukrajini je idealen primer za analizo kibernetškega vojskovanja. V vojni med Rusijo in Ukrajino je imelo kibernetško vojskovanje več različnih pomenov (za sodobne spopade). Kibernetški napadi niso le nova dimenzija vojskovanja, ampak so tudi dopolnili tradicionalne vojaške taktike, merijo lahko na digitalno in tudi na fizično infrastrukturo. Pred in med vojno so se ti napadi pogosto uporabljali za

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ustvarjanje zmede, oslabili so poveljevanje in tudi moralo vojakov ali civilistov. Če ga primerjamo s konvencionalnim bojevanjem, je kibernetško vojskovanje s finančnega in gospodarskega vidika enako uničujoče. Kibernetški napadi lahko destabilizirajo celotno gospodarstvo države in povzročijo dolgotrajne težave.

V članku bo analizirana doktrina kibernetškega vojskovanja Ukrajine in Rusije. Časovni okvir zajema obdobje pred invazijo in traja vse do leta 2024. Razloženi bodo posamezni načini delovanja kibernetškega vojskovanja v okviru doktrin. Raziskovalno vprašanje je: »Kako se ruska vojaška doktrina razlikuje od ukrajinske glede na ofenzivne in defenzivne strategije?«

Ta konflikt je za mednarodno skupnost jasen primer, zakaj je nujna potreba po močni kibernetški obrambi in zavarovani infrastrukturi. S tem se zmanjšujejo tveganja takšnih napadov. Posledice kibernetških napadov niso omejene le na regijo, saj zahtevajo globalni odziv (Singer in Friedman 2022; Rid 2020).

OPREDELITEV KONCEPTOV KIBERNETSKEGA VOJSKOVANJA

Kibernetško vojskovanje je opredeljeno kot kibernetški napad ali niz napadov na državo, ki povzročajo opustošenje infrastrukture in motijo delovanje kritičnih sistemov. Razprave med strokovnjaki o tem, kaj pomeni kibernetška vojna, še vedno potekajo.

Ameriško obrambno ministrstvo priznava, da internet pomeni tveganje za nacionalno varnost, kibernetške vojne pa natančneje ne opredeljuje. Leta 2010 je nekdanji ameriški nacionalni koordinator za varnost, zaščito infrastrukture in boj proti terorizmu Richard A. Clarke opredelil kibernetško vojno kot »dejanja države za vdor v računalnike ali omrežja druge države z namenom povzročitve škode ali motenj«. Običajno kibernetško vojskovanje izvaja ena država proti drugi, včasih pa tudi teroristične organizacije ali nedržavni akterji, ki želijo ogroziti cilje nasprotne države. Kljub temu do zdaj še ni univerzalne formalne opredelitve kibernetškega napada kot vojaškega dejanja (Clarke 2010).

V Talinskem priročniku (ang. *Tallinn Manual*), ki obravnava uporabo mednarodnega prava v kibernetškem prostoru, se izraz kibernetško vojskovanje (ang. *cyber warfare*) uporablja za opisovanje sovražnih dejanj v kibernetškem prostoru, ki so primerljiva z oboroženimi napadi (Schmitt 2017).

V slovenščini še ni univerzalno sprejete definicije; uporabljajo se različni izrazi, kot so informacijsko bojevanje, informacijsko vojskovanje in kibernetško vojskovanje. Poudarek je na tem, da informacijsko bojevanje ne zajema le vojaških operacij, ampak tudi vohunske, psihološke in gospodarske dejavnosti, ki jih izvajajo države, organizacije ali celo posamezniki. Kibernetško vojskovanje se v tem kontekstu pogosto uporablja kot del informacijskega bojevanja, zlasti kadar gre za napade v digitalnem prostoru, vendar jasna razmejitev med izrazi še ni ustaljena (Bernik & Prislan 2011).

V tem članku bosta uporabljena naslednja termina:

Kibernetko vojskovanje (ang. cyber warfare) označuje širši koncept uporabe kibernetkih operacij kot sredstva vojskovanja med državami ali oboroženimi akterji. Vključuje tako ofenzivne kot defenzivne strategije, kot so napadi na kritično infrastrukturo, vohunjenje, sabotaže in dezinformacije. To je strateški in politični vidik kibernetkega konflikta.

Kibernetko bojevanje (ang. cyber combat ali cyber operations in combat) pa se nanaša na konkretne operacije v okviru kibernetkega vojskovanja. Gre za dejanske napade in obrambo v kibernetkem prostoru, ki se izvajajo v okviru oboroženih spopadov ali drugih sovražnih aktivnosti. Ta izraz se pogosteje uporablja v vojaškem in operativnem kontekstu.

Najpogostejše vrste kibernetkih napadov

Za razumevanje kibernetkega vojskovanja je treba najprej razumeti najpogostejše kibernetke napade.

- Zlonamerna programska oprema je virus, ki napada informacijske sisteme (Malware, Ransomware, Wiper). Primeri zlonamerne programske opreme so izsiljevalni, vohunski in trojanski programi. Odvisno od vrste zlonamerne kode lahko hekerji zlonamerno programsko opremo uporabijo za krajo ali za skrito kopiranje občutljivih podatkov, blokirajo dostop do datotek, povzročajo motnje delovanja sistema ali onemogočijo delovanje sistemov (Pratt 2024).
- *Phishing* je vrsta kibernetkega napada, pri katerem se napadalci predstavljajo kot legitimni subjekti, da bi posameznike prevarali in dosegli, da jim posredujejo občutljive podatke, kot so uporabniška imena, gesla in številke kreditnih kartic. Ti podatki se nato uporabijo za škodljive namene, kot sta kraja identitete ali finančna goljufija (CISA 2024).
- *SMiShing*, imenovan tudi SMS phishing ali smishing, je razvoj metodologije lažnega predstavljanja prek besedila (storitev kratkih sporočil ali SMS). Hekerji pošiljajo (družbeno) oblikovana besedila, ki prenašajo zlonamerno programsko opremo, ko prejemniki kliknejo nanje. Te vrste napadov so zelo pogoste v ukrajinski vojni, saj vojaki z obeh strani prejemajo propagandna sporočila na svoje mobilne telefone (Pratt 2024).
- DDoS (distributed denial-of-service) se zgodi, ko hekerji bombardirajo strežnike organizacije z velikimi količinami podatkovnih zahtev hkrati, zaradi česar strežniki ne morejo obravnavati nobenih legitimnih zahtev. Ti napadi so prevladovali v začetnih dneh vojne v Ukrajini (Pratt 2024).
- »Tuneliranje« sistema domenskih imen (ang. *Domain name system – DNS*) je sofisticiran napad, pri katerem napadalci vzpostavijo in nato uporabljajo stalno razpoložljiv dostop ali predor/tunel v sisteme, na katere merijo (Pratt 2024).

Taktika kibernetkega bojevanja

Taktika se osredini na kratkoročne ukrepe in konkretne bojne operacije, medtem ko strategija določa dolgoročne cilje in splošno usmeritev vojne ali kampanje. Taktika obravnava, »kako« izvesti spopad, strategija pa »kaj« je njegov končni cilj in kako ga doseči (Clausewitz 1984).

Dezinformacije in propaganda – ruske dezinformacijske kampanje temeljijo na družbenih omrežjih. Glavni cilj je širiti nezaupanje v družbene in tradicionalne medije ter omajati zaupanje v poštenost volitev prek botnet sistemov.

Kibernetko vohunjenje – to ni vojskovanje kot tako, ampak stalna dejavnost držav, da ugotovijo prednosti in slabosti ne samo sovražnikov, ampak tudi drugih držav, prijateljskih ali neopredeljenih. Obstaja veliko dokumentiranih primerov kibernetkega vohunjenja organizacij, ki jih je sponzorirala država. Država je lahko osumljena ali razkrita, da je nadzorovala druge države za namene kibernetkega vohunjenja. Ameriška agencija za nacionalno varnost je na primer posnela skoraj vsak pogovor z mobilnim telefonom na Bahamih, ne da bi bahamska vlada to dovolila.

Kibernetki terorizem – to je uporaba nedržavnih akterjev, ki jih financira državni akter za izvajanje kibernetkih napadov. Cilji so: povzročiti fizično, politično, psihično, ekonomsko ali drugo škodo; ustvariti strah, nezaupanje; destabilizirati ali degradirati vlado ali politično pomembne dejavnosti in infrastrukturo.

Kibernetka sabotaža – gre za kibernetko operacijo, pri kateri nastane fizična škoda, oz. za sabotažo. To pomeni namerno uničiti, poškodovati ali ovirati delovanje infrastrukture znotraj države, zlasti zaradi politične ali vojaške koristi. Med sabotaže spada kibernetični napad na Viasat, pri katerem je bila povzročena ogromna škoda (A10 2022)

RUSKA DOKTRINA KIBERNETKEGA VOJSKOVANJA

Rusija na kibernetiko oziroma kibernetko vojskovanje gleda zelo drugače kot zahodne države. Ruski teoretiki opredeljujejo kibernetko vojskovanje glede na to, kako Kremelj uporablja svoje kibernetke zmogljivosti. Članek izpostavlja značilnosti ruske doktrine kibernetkih napadov ter kako je bila ta doktrina uporabljena v vojni z Ukrajino (Connel in Volger 2017, 1–2).

Rusko vojaško poveljstvo je prepričano, da je država »zaklenjena« v nenehnem, eksistencialnem boju z notranjimi in zunanjimi silami, ki želijo ogroziti varnost na informacijskem področju. Internet in prost pretok informacij, ki jih ustvarja, se pri tem obravnavata kot grožnja in tudi kot priložnost.

Ruska definicija kibernetkih napadov

Rusi na splošno ne uporabljajo izrazov, kot je kibernetko vojskovanje (rus. *kibervojna*), razen ko se sklicujejo na zahodne ali druge tuje zapise o tej temi. Namesto tega se nagibajo k uporabi besede informatizacija. To pomeni, da konceptualizirajo kibernetke operacije znotraj širše kategorije informacijske vojne. Izraz, kot ga uporabljajo ruski vojaški teoretiki, je celosten koncept, ki vključuje delovanje računalniških omrežij, elektronsko bojevanje, psihološke operacije in informacijske operacije. Z drugimi besedami, kibernetko vojskovanje je treba razumeti kot mehanizem, ki državi omogoča prevlado v informacijski pokrajini, ki velja za samostojno področje novodobnega vojskovanja. Idealno bi moral biti ta koncept kibernetkega bojevanja del celotnega vladnega prizadevanja, skupaj z drugimi, bolj tradicionalnimi metodami. Že vse od časov sovjetske vojaške doktrine se država ukvarja z dezinformacijskimi operacijami oz. tako imenovanimi *PsyOps*, vohunjenjem in politično subverzijo. Razvejanost tega pojmovnega razlikovanja je velika. Po navedbah Vojaške doktrine Ruske federacije iz leta 2010 je ena od značilnosti sodobnih vojaških konfliktov predhodna izvedba operacij informacijskega bojevanja – z namenom doseči politične cilje brez uporabe vojaške sile in nato v interesu oblikovanja ugodnega odziva mednarodne skupnosti. Tako informacijska vojna in posledično kibernetka vojna postaneta legitimno orodje države v miru in tudi v vojnem času (Connel in Volger 2017, 3–6).

General Valerij Gerasimov, načelnik generalštaba Ruske federacije, je v svojem zdaj slavnem članku »Vrednost znanosti pri napovedovanju« bolj splošno namigoval na mirnodobno uporabo informacijskih operacij; zapisal je, da se v 21. stoletju brišejo meje med stanjem vojne in miru. Vojne niso več napovedane. Izkušnje vojaških spopadov, vključno s tistimi, ki so povezani s tako imenovano barvno revolucijo v severni Afriki in na Bližnjem vzhodu, so potrdile, da se lahko popolnoma uspešna država v nekaj mesecih oz. tednih spremeni v areno hudih oboroženih spopadov. Države postanejo žrtev tuje intervencije in se potopijo v mrežo kaosa, humanitarnih katastrof in državljanskih vojn (Connel in Volger 2017, 7–8).

Ruska doktrina med kibernetnimi in informacijskimi operacijami ne razlikuje tako kot zahodna. Namesto tega ruski koncept prepleta fizične in psihološke značilnosti meddržavnega konflikta, ki je zdaj močno posredovan s tehnologijo v celotnem informacijskem prostoru. Dokument iz leta 2011, ki ga je objavilo rusko obrambno ministrstvo, je informacijsko vojno opredelil kot:

Konflikt med dvema ali več državami v informacijskem prostoru s ciljem povzročitve škode informacijskim sistemom, procesom in virom ter kritično pomembnim strukturam in drugim strukturam; spodkopavanje političnih, gospodarskih in družbenih sistemov; izvajanje množičnih psiholoških kampanj proti prebivalstvu države, da bi destabilizirali družbo in vlado; pa tudi prisiliti državo, da sprejema odločitve v interesu svojih nasprotnikov.

Ta definicija je veliko širša od tistega, kar ameriški analitiki imenujejo »kibernetška vojna«. Pomaga tudi pri razlagi krepitev političnih ciljev države in potrebe po propagandi v ruskih operacijah. Posebnost »informacijske vojne« v Rusiji je povezanost njenih akterjev. Kdo je organizator teh akcij? Proti komu so v resnici uperjene? Ta dvournost, ne glede na akterje, služi tako kot zaščita za državo in možnost zanikanja informacijske vojne (Connel in Volger 2017, 7–10).

Rusija ne izvaja informacijske vojne le v tujih državah, ampak tudi nad svojim prebivalstvom. Ta zasnova tudi briše meje med tujimi in domačimi grožnjami, pri čemer se opira na leninistične teme nenehnega političnega boja. Na to nakazujejo kibernetško podprta orodja spletnega nadzora in cenzure znotraj ruskih meja ter prizadevanja za izolacijo Rusije od svetovnega interneta. Zunanje-politične bitke Kremlja pogosto ni mogoče ločiti od njegovega boja za stabilnost domačega režima (Connel in Volger 2017, 10–12).

Glavni pomen bojevanja v informacijskem soočenju izhaja iz ruskega koncepta »strateškega odvracanja«. Temelji na razumevanju, da jedrsko orožje ne odvrča dovolj oz. celotnega spektra sodobnih varnostnih groženj. Torej strateško odvracanje ne vključuje le jedrske in konvencionalne vojaške moči, temveč tudi vrsto nevojaških orodij, kot so ideološki, politični, diplomatski, gospodarski in osrednji informacijski in digitalni ukrepi. Zato je pomembno razumeti, da pri strateškem odvracanju, kljub njegovemu imenu, ne gre le za odvracanje v zahodnem razumevanju tega izraza, temveč za celovit pristop k doseganju strateških ciljev. Ruska vojska je priznala, da se poskušajo razvijati na tem področju, saj se hočejo izogniti usodi Sovjetske zveze in gospodarski stagnaciji sodobne Rusije (Hakala in Melnychuk 2021, 10–19).

Značilnosti ruske doktrine

Ruska doktrina kibernetškega vojskovanja zajema vrsto strategij in taktik za doseganje in uresničitev ciljev v vojni. Ta doktrina vključuje tako ofenzivne kot defenzivne kibernetške zmogljivosti, zanj pa je pogosto značilna uporaba kibernetških orodij za vohunjenje, sabotažo in informacijsko bojevanje (Bateman 2022, 33; Willett 2022, 22–23).

- Informacijsko vojskovanje in psihološko delovanje: Rusija daje velik poudarek uporabi kibernetških orodij za informacijsko vojno, katere cilj je oblikovati javno mnenje in vplivati na politične rezultate. To vključuje širjenje dezinformacij, propagande in manipulacijo družbenih medijev za ustvarjanje razdora in nezaupanja v ciljnih družbah (Wilde 2022; Bateman 2022, 34–39).
- Vohunjenje in zbiranje obveščevalnih podatkov: ruske kibernetške operacije se pogosto osredotočajo na zbiranje obveščevalnih podatkov iz vladnih, vojaških in zasebnih omrežij. To dosegajo s prefinjenimi kibernetškimi vohunskimi kampanjami, ki izkoriščajo ranljivosti ciljnih sistemov za odliv občutljivih podatkov (Wilde 2022; Bateman 2022, 34–39).
- Napadi na ključno infrastrukturo: Rusija je dokazala, da je sposobna in da namerava napadati ključno infrastrukturo, vključno z energetskimi omrežji,

finančnimi sistemi in prometnimi omrežji. Eden od primerov takšnega napada je NotPetya. Ta napad je bil usmerjen na ukrajinsko električno omrežje in je povzročil obsežne motnje ter gospodarsko škodo. Glavni cilj napada je bil povzročiti prekinitev delovanja in škodo v omrežju. (Wilde 2022; Bateman 2022, 34–39).

- Kibernetna sabotaža: cilj ruskih kibernetnih napadov je tudi uničiti ali blokirati dostop do storitev. Zlonamerna programska oprema se namerno uporablja za oviranje ali uničenje delovanja državnih institucij, vlade ali vojske. Najpogostejše metode so okužbe z zlonamerno programsko opremo, pogosto so to napadi DDoS. Cilj je ohromiti infrastrukturo, povzročiti finančno izgubo ali ukrasti občutljive informacije (Wilde 2022; Bateman 2022, 34–39).
- Usklajevanje z vojaškimi operacijami: ruske kibernetne zmogljivosti so trenutno vključene v konvencionalne vojaške operacije. S tem se poveča splošna učinkovitost vojaških kampanj. Kibernetne operacije se lahko uporabljajo za zbiranje obveščevalnih podatkov, motenje sovražnikovih komunikacij in podporo tradicionalnih vojaških operacij na bojišču. Vojska si s kibernetnimi operacijami zagotovi strateško boljše ciljanje, obveščevalne podatke in lažjo okupacijo območja (Bartles 2016, 30–37; Bateman 2022, 34–39).

Informacijsko bojevanje in psihološko delovanje

Informacijsko bojevanje in psihološke operacije so osrednje sestavine ruske doktrine kibernetnega bojevanja. Cilj te strategije je vplivati na nasprotnika, ga ovirati in spodkopati njegovo politično, družbeno in gospodarsko stabilnost. Vključuje uporabo različnih tehnik za manipuliranje z javnim mnenjem, širjenje dezinformacij in ustvarjanje družbenega razdora.

Glavni cilj ruske informacijske vojne je ustvariti politične razmere, ki ustrezajo njihovim ciljem. To se naredi v treh fazah. Najprej je treba pridobiti celotno sliko situacije. Ugotoviti, kako ciljno prebivalstvo dojema realnost, zatem usmerjati politične in družbene danosti v korist Rusije. Druga faza je spodkopavanje zaupanja ljudstva v državne institucije, medije in demokratične procese v državi. Tretja in zadnja faza je sejati zmešnjavo – ustvarjanje kaosa v nasprotni državi, da bi oslabil enotnost in ustvarili ugodnejše okolje za ruske interese. Informacijsko bojevanje tudi pripomore k lažji okupaciji območja, ki ga je okupirala ruska stran (Atlantic Council 2024; Treyger in drugi 2022, 10–15).

Vohunjenje in zbiranje obveščevalnih podatkov

Zgodovinsko gledano sta bila vohunjenje in zbiranje obveščevalnih podatkov ključna vidika vojskovanja, prav tako tudi za kibernetno vojskovanje. Gre za zbiranje občutljivih informacij vladnih, vojaških in zasebnih virov. Tovrstne operacije so namenjene zagotavljanju strateških prednosti, pri čemer lahko strategiji potem informirano sprejemajo odločitve (Stiftung Wissenschaft und Politik 2023; Watts 2023).

Glavni cilji ruskega kibernetkega vohunjenja so pridobiti strateške informacije, spodkopavati sile nasprotnikov in podpirati vojaške in diplomatske cilje svoje države. Torej je glavni in najpogostejši cilj teh napadov pridobiti dragocene podatke, povezane z nacionalno varnostjo, vojaškimi zmogljivostmi, gospodarskimi strategijami in tehnološkimi inovacijami. Z natančnimi obveščevalnimi podatki si država priskrbi povečanje učinkovitosti vojaških operacij in diplomatskih pogajanj. S tem država tudi slabi zmogljivosti in moralo konkurenčnih držav z razkrivanjem ranljivosti in izkoriščanjem ukradenih informacij za propagando ali izsiljevanje (Stiftung Wissenschaft und Politik 2023; Watts 2023).

Socialni inženiring je znana taktika ruskega kibernetkega vojskovanja. To je manipulacijska taktika, ki se uporablja za pridobitev nadzora nad računalniškim sistemom ali krajo osebnih in finančnih podatkov. Napadalcı uporabljajo psihološko manipulacijo, da zavajajo uporabnike in jih napeljejo k napakam ali razkritju občutljivih informacij. Napadi socialnega inženiringa se izvajajo v več korakih, pri čemer napadalec najprej raziše svojo žrtev in zbere potrebne informacije za izvedbo napada. Nato uporabi različne taktike, kot je pridobivanje zaupanja žrtve, da jo prepriča k nepremišljenim dejanjem, ki ogrozijo varnostne prakse, na primer razkritje občutljivih informacij ali odobritev dostopa do pomembnih virov (Watts 2023).

Kibernetke sabotaze in bojevanje proti ključni infrastrukturi

Kibernetki napadi na vladna omrežja in infrastrukturo lahko vplivajo na kulturo in javno mnenje, še posebej pred političnimi volitvami. Takšni napadi, ki vključujejo kibernetko vohunjenje in dezinformacijske kampanje, lahko vplivajo na volivce in trajno poslabšajo demokratične procese. Hekerji, opremljeni s kibernetkim orodjem, kradejo denar, podatke in širijo laži, kar vpliva na zaupanje v vlado (legitimnost) in moti komunikacije. Nekateri režimi uporabljajo kibernetke operacije za vplivanje na notranje zadeve drugih držav in povzročanje političnih in družbenih nemirov. Zaščita agencij za nacionalno varnost in vladnih omrežij je zato nujna. Za boj proti kibernetkim grožnjam sta potrebna močna kibernetka varnost in mednarodno usklajevanje med zavezniki, saj imata lahko kibernetka vojna in vohunjenje resne posledice za mednarodne odnose in nacionalno varnost. Kibernetki napadi, kot so napadi na kreditna omrežja in plačilne sisteme, lahko povzročijo veliko gospodarsko škodo in ovirajo gospodarstvo v primeru motenj v energetskih sistemih in industrijskih dejavnostih. Obramba pred takšnimi napadi predstavlja operativne izzive. Poleg tega kibernetko vohunjenje ogroža gospodarstva, saj lahko napadalcı ukradejo občutljive podatke ali intelektualno lastnino, kar jim daje poslovne prednosti. Stroški, povezani s kibernetnimi napadi, vključujejo odzivanje na incidente in izdatke za varnost računalniških sistemov. Poleg tega lahko napadi povzročijo dolgoročne stroške, kot sta okrnjen ugled blagovne znamke in izguba zaupanja strank, kar lahko privede do izgub za podjetje. Vdori v vojaške sisteme lahko geopolitično vplivajo tudi na svetovne trge (Slonopas 2024).

Usklajevanje kibernetkega bojevanja z vojaškimi operacijami

Potem ko je februarja leta 2022 izvedla invazijo na Ukrajino, je Rusija – tako kot v vojni z Gruzijo – dopolnila tradicionalno vojskovanje s kibernetkim. Rusiji je uspelo tudi povečati učinkovitosti tradicionalnih vojaških sil z motenjem sovražnikovih komunikacij, logistike in sistemov poveljevanja in nadzora. Strokovnjaki ugotavljajo, da so kibernetke operacije v vojni uporabne tudi za napadanje logističnih sistemov, saj so ti pogosto civilni in manj zavarovani kot vojaški. Kljub temu mnogi ugotavljajo, da kibernetke zmogljivosti najbolj služijo obveščevalnim in izvidniškim funkcijam ter ne nadomeščajo konvencionalnega orožja. V mnogih primerih je hitreje, enostavneje in tudi ceneje nevtralizirati cilj z letalskimi napadi ali artilerijskim ognjem kot pa s kibernetko operacijo (Schulze in Kerttunen 2023; Kerr 2023).

Kibernetko bojevanje se dandanes ne obravnava več kot samostojna zmogljivost, ampak kot dodatek h konvencionalnim zmogljivostim. Kibernetke operacije lahko delujejo zelo učinkovito, če se uporabljajo na kombiniran način. Omogočajo pridobitev strateške prednosti z boljšim pridobivanjem informacij in motenjem sovražnikovih. Primer za to je zlonamerna programska oprema X-Agent, ki se infiltrira v opremo za ciljanje artilerije in posreduje geolokacijo artilerijskih položajev sovražnim silam, ki nato usmerjajo ogenj. Ta konceptualizacija kibernetkih zmogljivosti se odlično ujema z idejo manevrskega bojevanja in ohromitve sovražnika s kirurško natančnimi udarci. S tem se oslabi nasprotnikovo obrambo in infrastrukturo, s čimer se pripravi pot za učinkovitejše konvencionalne napade. Konstantno se tudi spodkopava sovražnikovo moralo in zaupanje civilistov z ustvarjanjem zmede in kaosa, kar vpliva na zmanjševanje odpora do prihodnjih vojaških ukrepov (Schulze in Kerttunen 2023; Kerr 2023).

UKRAJINSKA KIBERNETSKA DOKTRINA

Ukrajinska kibernetka doktrina je usmerjena k krepitvi kibernetkih zmogljivosti za obrambo kibernetke varnosti; s tem se odziva na vse večje kibernetke grožnje, zlasti s strani državnih akterjev. Doktrina, ki temelji na načelih nacionalne varnosti, daje prednost zaščiti kritične infrastrukture, vladnih sistemov in omrežij zasebnega sektorja pred kibernetkimi napadi. Glede na geopolitične razmere v Ukrajini, ki se sooča s trajno kibernetko agresijo, vključno z zloglasnim napadom NotPetya leta 2017, doktrina poudarja pomen proaktivnega in sodelovalnega pristopa h kibernetki varnosti.

Strategija kibernetke varnosti temelji na treh načelih državne politike na področju nacionalne varnosti:

- odvrčanje – razvoj varnostnih in obrambnih zmogljivosti za odvrčanje oborožene agresije na Ukrajino;
- odpornost – sposobnost družbe in države, da se hitro prilagodi spremembam v varnostnem okolju in ohrani trajnostno delovanje, zlasti z zmanjševanjem zunanje in notranje ranljivosti;

- interakcija – razvoj strateških odnosov s ključnimi tujimi partnerji, predvsem z Evropsko unijo in Natom ter njunimi državami članicami, Združenimi državami Amerike, in pragmatično sodelovanje z drugimi državami in mednarodnimi organizacijami; to temelji na nacionalnih interesih Ukrajine.

Osrednje načelo doktrine je spodbujanje sodelovanja med vladnimi organi, zasebnimi podjetji in mednarodnimi zavezniki, da bi ustvarili skladen sistem kibernetске obrambe. Poudarja krepitev zmogljivosti z usposabljanjem, raziskavami in razvojem domačih rešitev na področju kibernetске varnosti. Doktrina spodbuja tudi ozaveščanje javnosti o tveganjih za kibernetско varnost ter odgovornost posameznikov pri vzdrževanju primernih digitalnih sledi. Cilj tega strateškega pristopa ni le zaščita ukrajinske digitalne suverenosti, temveč tudi prispevek h kolektivni varnosti svetovnega digitalnega ekosistema (Atkins 2022; Spînu 2020, 6–10).

Priznavanje kibernetскеga prostora kot operativne domene

Strategija kibernetске varnosti Ukrajine, ki je bila sprejeta z odlokom predsednika leta 2016, opredeljuje grožnje kibernetски varnosti in ustrezne prednostne naloge za zagotavljanje kibernetске varnosti v Ukrajini. Ta dokument temelji na določbah Konvencije Sveta Evrope o kibernetски kriminaliteti in je namenjen ustvarjanju razmer za varno delovanje kibernetскеga prostora in njegovo uporabo v interesu posameznika, družbe in države. Strategija kibernetске varnosti Ukrajine (2016) je bila prvi uradni dokument na področju kibernetске varnosti. Opisuje glavne grožnje na področju kibernetске varnosti in priznava »kibernetски prostor« kot ločeno področje sovražnosti, v katerem so vse bolj dejavne kibernetске enote drugih oboroženih sil vodilnih držav. Dokument opisuje tudi nacionalni sistem kibernetске varnosti in določa odgovornosti za glavne subjekte kibernetске varnosti. Druga različica Strategije nacionalne varnosti Ukrajine, ki je bila potrjena leta 2020, je postala podlaga za številne nove strategije na več področjih. Varnost in razvoj kibernetскеga prostora, uvedba e-uprave, zagotavljanje varnosti in trajnostnega delovanja elektronskih komunikacij in nacionalnih elektronskih informacijskih virov morajo biti sestavni vidiki državne politike razvoja informacijskega prostora in razvoja informacijske družbe v Ukrajini (Atkins 2022; Spînu 2020, 5).

Kolektivna obramba in medsebojna pomoč

Doktrina Nata poudarja kolektivno obrambo, pri čemer se napad na eno članico šteje za napad na vse. Ukrajina, ki se sooča z nenehnimi kibernetскиmi grožnjami, zlasti s strani akterjev, ki jih podpirajo tuje države, poudarja pomen mehanizmov kolektivne obrambe in mednarodnega sodelovanja. Ukrajina aktivno sodeluje z Natom in drugimi mednarodnimi partnerji, da bi okrepila svoje zmogljivosti kibernetске obrambe, ter si prizadeva za vzajemno pomoč in podporo. Ukrajinska strategija vključuje tudi partnerstva in sodelovanje z

mednarodnimi organi, da bi okrepila svojo kibernetko obrambo (Atkins 2022; Spînu 2020, 7–11).

K uspehu ukrajinske kibernetke obrambe je verjetno prispevalo več dejavnikov, med njimi pa so najpomembnejša partnerstva z drugimi državami. Čeprav partnerstva na področju kibernetke varnosti niso novost, je uspeh pogosto izmuzljiv in omejen. V ukrajinskem primeru je Kijev na operativni ravni (kjer poteka večina kibernetke obrambe) učinkovito sodeloval s številnimi sposobnimi subjekti na mednarodni, industrijski in vladni ravni. Zato je Ukrajina lahko uporabila mrežo operativnega partnerstva, ki omogoča dinamično usklajevanje različnih tehničnih zmogljivosti, strokovnega znanja in pristojnosti za skupno prepoznavanje groženj in obrambno ukrepanje. Ločeno so bile pred invazijo napolnene ekipe, sestavljene iz ameriških vojakov iz kibernetkega poveljstva ZDA in civilistov iz ameriških podjetij, ki so pomagali pri pripravi ukrajinske obrambe. Vzpostavili so delovne odnose z ukrajinskimi upravljavci infrastrukture, kar je pomagalo preprečiti napade na najpomembnejše sisteme, kot so železniška infrastruktura in omrežja za nadzor meje. V več primerih so izkoristili odnose z zasebnimi podjetji za kibernetko varnost in drugimi vladnimi subjekti, da bi zagotovili obrambne rešitve, prilagojene grožnjam (Atkins 2022; Spînu 2020, 10–11).

Skupine za hitro odzivanje na kibernetke grožnje in odzivanje na incidente

Ekipe Nata za hitro odzivanje na kibernetke incidente (*ang. Cyber Rapid Reaction Teams – CRRT*) so namenjene zagotavljanju takojšnje podpore med večjimi kibernetkimi incidenti. Ukrajina je razvila podobne mehanizme hitrega odzivanja za takojšnje odzivanje na kibernetke grožnje. To vključuje vzpostavitev specializiranih enot v njenem varnostnem aparatu za hitro obravnavo kibernetkih incidentov in ublažitev njihovih posledic (Spînu 2020, 9–10).

Javno-zasebna partnerstva

Ukrajina je že imela določeni okvir za javno-zasebna partnerstva, ki so povezana s področjem kibernetke varnosti, vendar pa so vse bolj zahtevni izzivi zahtevali hitro in celovito revizijo ter izboljšanje tehničnih in operativnih vidikov kibernetke varnosti. V prvi strategiji kibernetke varnosti je leta 2016 ustvarila razmere za varno delovanje kibernetkega prostora v korist posameznika, družbe in države. Trenutno posodobljena različica je namenjena obravnavi in izboljšanju vprašanj komunikacije in usklajevanja med vladnimi agencijami. Ukrajina ne premore finančnih spodbud, s katerimi bi pritegnila najboljše strokovnjake k delu za vlado. Zato je toliko bolj pomembno povečati sodelovanje med javnim in zasebnim sektorjem, ki je ključno za uspeh na področju kibernetke varnosti. Velik del krepitev ukrajinske kibernetke obrambe ne bi bil mogoč, če zahodni partnerji ne bi finančno pomagali ter usposabljali strokovnjake. Da bi Ukrajina v državi dosegla močno kibernetko varnost, bi morala zagotoviti enak obseg

razvoja med zasebnim sektorjem in kibernetsko infrastrukturo. Področje javno-zasebnega partnerstva je še v zgodnji fazi razvoja, vendar že ima ključen pomen (Spînu 2020, 10–12; Koyanagi 2022).

Razvoj pravnih in normativnih okvirov

Zakon »O osnovnih načelih kibernetske varnosti Ukrajine« opredeljuje pravno in organizacijsko podlago za zaščito vitalnih interesov države v kibernetskem prostoru. Namen zakona je zagotoviti varnost človeka, družbe in države ter zaščititi nacionalne interese. Zakon določa cilje, usmeritve in načela državne politike na področju kibernetske varnosti ter pooblastila organov, podjetij, institucij, organizacij, posameznikov in državljanov na tem področju (Atkins 2022; Spînu 2020).

GLAVNE RAZLIKE MED DOKTRINAMI – PREGLED IN PRIMERJAVA

Primer ruske doktrine na napadu »WhisperGate«

Napad WhisperGate se je začel 14. januarja 2022, v ukrajinskih medijih pa so o njem poročali dan kasneje. Napad je vključeval tri komponente: zlonamerni nalagalnik, program za prenos datotek in brisalec datotek. Programska oprema je bila zasnovana tako, da je uničevala podatke okuženih sistemov, pri čemer se je prikazovala kot izsiljevalska programska oprema, čeprav ni omogočala obnovitve podatkov. Napad je poškodoval glavni zagonski zapis (MBR), s čimer je onemogočil delovanje sistemov, nato pa je prepisal datoteke z lažno zahtevo po odkupnini (Microsoft 2022; Crowdstrike 2022).

Napad je povzročil hude motnje v ključni infrastrukturi, potekal pa je sinhronizirano z napadi DDoS na ukrajinske spletne strani. Cilj je bil ustvariti kaos, zmanjšati zaupanje v vlado in demoralizirati prebivalstvo pred invazijo Rusije. Usklajenost napada z invazijo nakazuje, da je bil del širše strategije kibernetskega bojevanja za destabilizacijo države (Crowdstrike 2022; Lyons 2022).

Primer ukrajinske doktrine na napadu »Industroyer2«

Izbruh konflikta v vzhodni Ukrajini leta 2014 je sprožil številne kibernetske napade, predvsem na ukrajinsko električno infrastrukturo. Industroyer2 je nadgradnja zlonamerne programske opreme Industroyer, namenjena motenju industrijskih nadzornih sistemov v električnih postajah. Uporabljena je bila v napadu na ukrajinsko električno omrežje leta 2016, kar je povzročilo izpad elektrike v Kijevu (HeadMind Partners 2022).

Ukrajina je na napad Industroyer2 uspešno odgovorila, saj je od leta 2016 zelo izboljšala kibernetsko varnost. Sodelovanje z ESET in CERT-UA je omogočilo zgodnje odkrivanje napada in hitro izolacijo okuženih sistemov, s čimer so preprečili hujše posledice (ESET 2022).

Krepitev kibernetske obrambe, nadzor industrijskih sistemov ter sodelovanje z mednarodnimi agencijami so bili ključni za uspešno obrambo. Ta odziv

jasno odraža ukrajinsko doktrino kibernetnega vojskovanja, ki je primarno defenzivno usmerjena. Njena strategija temelji na odpornosti, hitrem odzivu ter sodelovanju s partnerji, kot so tehnološka podjetja in Nato. Namesto izvajanja agresivnih kibernetnih napadov Ukrajina krepi svojo obrambno infrastrukturo, kar je ključno za zaščito pred prihodnjimi grožnjami (ESET 2022; HeadMind Partners 2022).

Tabela 1: PRIMERJALNA TABELA DOKTRIN

Doktrina	Ruska doktrina	Ukrajinska doktrina
Osnovna usmeritev	Ofenzivna – usmerjena v napad in destabilizacijo	Defenzivna – usmerjena v zaščito in odpornost
Glavni cilji	Destabilizacija nasprotnikov, vpliv na politične procese, širjenje dezinformacij	Zaščita kritične infrastrukture, zagotavljanje nacionalne varnosti
Uporaba kibernetnih operacij	Vključuje informacijsko vojno, vohunjenje, sabotaže in psihološke operacije	Poudarek na obrambi pred napadi, izboljšanje kibernetne varnosti in odpornosti
Glavna taktika	Kibernetno vohunjenje, dezinformacije, napadi na infrastrukturo, širjenje propagande	Hitra odzivnost na incidente, kibernetna odpornost, javno-zasebna partnerstva. Uporaba specializiranih enot za hitro odzivanje kibernetnim grožnjam
Sodelovanje s tujimi akterji	Povezava z državnim nadzorom in vojaškimi enotami, pogosto uporaba prikritih akterjev	Močno sodelovanje z Natom, EU, zasebnimi podjetji in organizacijami za kibernetno varnost
Primeri napadov	Napad NotPetya, napadi DDoS, sabotaže ukrajinske infrastrukture	Obramba pred napadi na električno omrežje, finančne institucije, železniško infrastrukturo
Povezava s konvencionalnim vojskovanjem	Kibernetne operacije podpirajo vojaške akcije in destabilizacijo nasprotnikov	Kibernetne operacije kot dodatek h konvencionalni obrambi in zaščiti prebivalstva
Glavna slabost	Močna ofenziva, a težave pri prikrivanju sledi in mednarodni odziv	Odvisnost od zunanje podpore in omejeni lastni viri

Vir: Povzeto po Connel in Volger (2017), Bateman (2022), Wilde (2022), Spīnu (2020).

SKLEP

Na zastavljeno raziskovalno vprašanje »Kako se ruska vojaška doktrina razlikuje od ukrajinske glede na ofenzivne in defenzivne strategije?« je mogoče odgovoriti. Doktrini kibernetnega vojskovanja Rusije in Ukrajine sta nesimetrični. Ruska doktrina se zanaša na ofenzivo, medtem ko se ukrajinska na defenzivo. Ruska strategija je izrazito ofenzivna, z močno osredotočenostjo na informacijsko vojskovanje, vohunjenje in sabotaže, medtem ko je ukrajinska doktrina primarno defenzivna, s poudarkom na zaščiti kritične infrastrukture in sodelovanju z mednarodnimi partnerji. Poleg tega ima Rusija zaradi močnejših virov in bolj

razvite infrastrukture večjo sposobnost izvajanja kibernetских napadov, medtem ko je Ukrajina okrepila svojo odpornost predvsem z zavezništvu z zahodnimi državami in zasebnimi tehnološkimi podjetji. Ruska doktrina je zasnovana tako, da povzroči čim večji kaos ter škodo, finančno in človeško. Posledično je tovrstno hibridno bojevanje v nasprotju z mednarodnim humanitarnim pravom, saj je usmerjeno na civilno infrastrukturo, bistveno za preživetje, kot so električna omrežja in zdravstveni sistemi. Humanitarno pravo zahteva razlikovanje med civilnimi in vojaškimi cilji ter prepoveduje napade, ki povzročajo nesorazmerno škodo civilistom. Kibernetски napadi, ki motijo oskrbo z električno energijo ali vodo, kršijo ta načela, ogrožajo življenja in zaostrujejo humanitarne krize. Težave z identifikacijo kibernetских napadov zamegljujejo odgovornost in opozarjajo na pomanjkljivosti pri uporabi mednarodnega humanitarnega prava v digitalni vojni. Te kršitve poudarjajo, da je treba humanitarno pravo nujno prilagoditi za učinkovito obravnavo kibernetских vplivov na civiliste. Medtem pa je ukrajinska doktrina drugačna od ruske. Ukrajinska doktrina si prizadeva za hiter odziv na nove grožnje in minimiziranje škode napadov, vendar se močno zanaša na zunanjo pomoč, kar bi lahko v prihodnosti predstavljalo šibkost.

- Mednarodno pravo se bo seveda moralo prilagoditi novim oblikam vojaških konfliktov, saj se vojskovanje vse bolj premika v novo digitalno sfero ter združuje različne metode, kot sta kibernetско in hibridno vojskovanje. Obstoječa pravila, kot so Ženevske konvencije, so bila zasnovana za tradicionalne konflikte, zato je nujno oblikovati jasnejše smernice o tem, kdaj kibernetски napad šteje za oborožen napad in kakšne so njegove pravne posledice. Prav tako bo treba urediti odgovornost držav in posameznikov za škodo, povzročeno s kibernetскими operacijami, ter določiti, kdaj se država pred njimi brani. V prihodnosti bo mednarodna skupnost morala vzpostaviti jasnejša pravila glede uporabe kibernetских napadov in umetne inteligence v vojaške namene. Eden od izzivov bo preprečevanje eskalacije konfliktov zaradi napačnega pripisovanja napadov.
- Talinski priročnik je orodje za razumevanje kibernetского prava, saj predstavlja temeljito študijo o uporabi obstoječega mednarodnega prava v kibernetских konfliktih. Nastal je pod okriljem Natovega centra odličnosti za kibernetско obrambo (CCDCOE), pripravila ga je skupina mednarodnih strokovnjakov. Priročnik preučuje, kako se pravila, kot sta *jus ad bellum* (pravica do vojne) in mednarodno humanitarno pravo, uporabljajo v kibernetских operacijah. Čeprav ni pravno zavezujoč, služi kot pomembna referenca za razumevanje mednarodnega prava v kibernetском prostoru. Ker se kibernetские grožnje nenehno razvijajo, si mednarodna skupnost prizadeva prilagoditi pravne okvire tako, da uravnotežijo varnostne interese držav ter zaščito pravic posameznikov v digitalnem okolju. Države morajo spoštovati digitalno infrastrukturo drugih držav in se vzdržati vmešavanja v njihove notranje zadeve. Kibernetски napadi, ki povzročijo znatno škodo, primerljivo s fizičnimi napadi, se lahko po Ustanovni listini ZN štejejo za uporabo sile,

kar lahko upraviči samoobrambo. V oboroženih konfliktih morajo kibernet-ske operacije jasno ločevati med vojaškimi in civilnimi cilji ter se izogibati pretirani škodi. Poleg tega lahko vlade odgovarjajo za kibernet-ske napade, ki izvirajo z njihovega ozemlja, tudi če jih izvajajo nedržavni akterji. Kibernet-ske operacije tudi ne smejo kršiti temeljnih človekovih pravic, kot sta pravica do zasebnosti in svoboda izražanja (Schmitt 2017).

- Eden pomembnejših etičnih izzivov pri uporabi kibernet-skih operacij v vojni je razmerje med učinkovitostjo in človeškimi pravicami. Kibernet-sko orožje je večinoma uporabljeno za hibridno vojskovanje in lahko povzroči veliko škodo civilni infrastrukturi, kot so bolnišnice, električna omrežja ali vodo-vodni sistemi, kar pomeni neposredno ogrožanje življenj. Poleg tega je težko določiti odgovornost za kibernet-ske napade, saj jih lahko izvajajo tako države kot nedržavni akterji. Vse to zastavlja vprašanja o pravičnosti in odgovornosti v sodobnem vojskovanju.
- Ukrajinska kibernet-ska doktrina se osredini na obrambne ukrepe, medna-rodno sodelovanje in usklajevanje s standardi kibernet-ske varnosti Nata in EU. Podpira načela suverenosti, nevmešavanja in zaščite kritične infrastruk-ture, pri čemer je v veliki meri v skladu z mednarodnimi normami, vključno s Talinskim priročnikom. Ukrajina prav tako poudarja boj proti dezinformacijam in kibernet-skim grožnjam iz Rusije. Ruska kibernet-ska doktrina pa zavzema bolj agresivno držo in poudarja »informacijsko suverenost« in ofenzivne kibernet-ske zmogljivosti. Kibernet-ske operacije vključuje kot del hibridnega vojskovanja, pri čemer pogosto krši mednarodne norme. V primerjavi z mednarodnim pravom si Ukrajina v veliki meri prizadeva za skla-dnost, medtem ko Rusija pogosto izpodbija uveljavljene pravne okvire in uporablja kibernet-ska orodja za razširitev državne moči. Ta kontrast spodbu-ja nenehne geopolitične kibernet-ske napetosti.
- Prihodnost kibernet-skega vojskovanja bo zaznamovala večja povezanost ki-bernet-skih napadov s konvencionalnimi oz. tradicionalnimi načini vojsko-vanja. Z napredovanjem tehnologije bodo države (in tudi nedržavni akterji) razvile še bolj zapletene vrste napadov, ki bodo lahko povzročili ogromno škode, predvsem z orodji UI (ang. AI). Meje med kibernet-skim in kinetič-nim bojevanjem se bodo zabrisale. Kibernet-ska orodja se v vojni uporabljajo kot artilerija, da se omehča teren in pripravi območja za tradicionalni kine-tični napad. Kibernet-sko vojskovanje je predvsem pomembno za predvojno načrtovanje, propagando in demoralizacijo, strateško ciljanje ključne infra-strukture in drugih tarč in nadziranje okupiranega območja. V zvezi s kiber-net-skim vojskovanjem je treba izpostaviti, da sodi v okvir hibridnega vojsko-vanja, saj poleg vojaških tarč meri predvsem na civiliste. Najverjetneje bodo tudi prihodnje vojne še vedno temeljile na hibridnem vojskovanju. (Duguin in Pavlova 2023, 14–15).

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THE CYBER WARFARE DOCTRINES OF RUSSIA AND UKRAINE

Abstract. *Cyber warfare has introduced a new dimension to modern conflicts whereby the risks are greater than ever before as critical infrastructure, financial systems, and personal data become targets. The boundaries between the digital and physical worlds are becoming blurred, adding to the need for effective cyber-security. The purpose of the work is to examine the impact of cyber warfare in the Russo-Ukrainian war. Understanding doctrines and tactics helps enhance national security, protect civilians, and maintain the stability of global digital infrastructure, and permits the development of strategies to mitigate risks in future conflicts.*

Keywords: *Cybernetics, warfare, war, doctrine, defence.*

Davorin ŽNIDARIČ*

RUDARSKO INDUSTRIJSKA REGIJA ZASAVJE, SKOZI RAZLIČNE OBLIKE (NE)PRAVIČNOSTI**

Povzetek. V članku se avtor ukvarja z vprašanjem post-industrijske krize rudarske regije Zasavje in vzrokov za njene probleme skozi čas. Skozi analize pravičnosti, avtor konstruktivno in predvsem kritično pretresa posledice stanj v regiji, ki so nekoč gospodarsko uspešno regijo privedle v primež okoljske in socialne stagnacije. Različne segmente nepravičnosti, osvetli skozi specifična ravnanja državnih in lokalnih odločevalskih akterjev ter politiki in polisi v regiji. Konstruktivna kritična analiza avtorju omogoča poiskati vzroke, ki so poleg okoljskih degradacij zaradi posledic dolgoletne intenzivne in neekološke industrijske dejavnosti v specifičnih geografskih in vremenskih razmerah, regijo potisnili v primež okoljske, socialne in družbene nepravičnosti. V sklepnem delu se avtor z obravnavo družbenih sistemov in vzrokov za pomanjkanje odziva kritične javnosti do delovanj industrij v regiji osredini na rešitve, ki bi bile skozi preoblikovano vladavino prava in odločevalskih struktur, usmerjene v koristi družbe, okolja in narave. Obenem pa bi v regiji omogočile manjšo nepravičnost.

Ključni pojmi: Zasavje, rudarsko energetska regija, okoljska pravičnost, neenakost, škodljiva in neekološka ravnanja, vladavina prava, konstruktivna kritična analiza.

UVOD

Človeštvo se dandanes srečuje s številnimi izzivi: okoljskimi, družbenimi in nenazadnje političnimi, ki vodijo v vse večje konflikte med ljudmi ter človekom in naravo. Zaradi nebrzdanega in neenakomernega razvoja družbe, omejitev planeta, vse izrazitejših in pogostejših okoljskih vplivov in posledic, predvsem pa usmerjenosti sodobne potrošniške družbe v nenehno rast in kopičenje materialnih dobrin, se kritična javnost, vse pogostejše sprašuje, kje so meje takšnega ravnanja.

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** Pregledni znanstveni članek.
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Zaradi posledic neenakega razvoja, kolonialne dediščine, nepravične porazdelitve dobrin in okoljskih tveganj, izkoriščanja siromašnih nerazvitih ali delovanja vplivnih držav s položajem moči, se sodobna družba srečuje s kritikami na račun vse večje družbene in okoljske nepravičnosti.

Družba, ki spodbuja, tekmovalnost, moč in vpliv, nadvlado človeka nad naravo in sočlovekom, katere delovanje je usmerjeno v prevlado moči ter povzdigovanje dobička in materialnih dobrin, je glede na vse konflikte v prostoru, izgubila moralni in etični kompas o tem, kaj je prav in kaj ni. Zato se v tem članku osredotočam na načelo pravičnosti v specifičnem okolju Zasavske regije.

TEMELJNI POUDARKI PRAVIČNOSTI

Načelo ali ideja, ki se ukvarja s poštenim odnosom do posameznika, označuje pojem pravičnost. Po Rimskem pravu iz 6. Stoletja, je pravičnost opredeljena kot stalna in nenehna volja, da se vsakomur zagotovi zasluženost. Pojem zasluženost tolmačijo različna področja, filozofske veje, vključno z etiko, racionalnostjo, pravom, religijo in pravičnostjo.

Zaradi družbenih anomalij in rasti različnih oblik nepravičnosti, je razumevanje pojma pravičnosti bistvenega pomena pri iskanju družbe in morale, ki bo-sta konflikte v družbi preprečili ali jih vsaj omejili.

Pravičnost lahko definiramo skozi različne vidike, družbene sisteme ali razmerja v prostoru. Tako kot je definicij trajnosti toliko, kot je avtorjev, je tudi razlag pravičnosti veliko. Definirane so na podlagi delovanja avtorjev in njihovih svetovnonazorskih načel, razvoja družb, v kateri posamezniki delujejo, ter sprejetih splošno veljavnih etičnih in moralnih načel. Po Platonu gre pri pravičnosti za razmerje med ravnovesjem in harmonijo, med nasprotujočimi si pogledi posameznika in skupnosti, pri čemer vsakemu pripada pravična nagrada za vložena trud in delo. O obliki pravičnosti lahko odloča tisti, ki jo je sam sposoben prepoznati in vrednotiti na osnovi najvišjih moralnih in etičnih načel.

V osnovi naj bi obstajali trije tipi pravičnosti, to so: socialna, ekonomska in politična. Zaradi vse intenzivnejših okoljskih in družbenih konfliktov, iz katerih izhajajo vse druge nepravičnosti, je dandanes vse bolj pomembna okoljska. Za lažje razumevanje, kaj pravičnost pomeni, v katera področja je vključena in katere so njene značilnosti, te v teoretičnem delu članka tudi razčlenjujem.

Socialno pravičnost lahko v sodobni politiki, družboslovju in politični filozofiji obravnavamo kot temeljni cilj države in družbe, ki se zavzema za omejitve egoističnih dejavnosti posameznikov, da bi zagotovili pravično porazdelitev, popolno enakost in pravične koristi za vse. Najzgodnejša uporaba termina socialna pravičnost sega v leto 1840, ko je svetovalec Vatikana Luigi Taparelli, izraz uporabil, da bi dokazal, zakaj je treba revne in brezpravne ljudi obravnavati enako kot druge v družbi (Intercollegiate 2014; Mollenkamp in sod. 2024).

V kontekstu družbenih razmerij, lahko socialno pravičnost obravnavamo kot ravovesje med osebnimi in družbenimi interesi, ki so zamejeni znotraj splošno sprejetih norm in zakonov, ki naj bi zagotovili, da so vsi člani družbe deležni

poštene in enakopravne obravnave. Izraz se uporablja tudi za označevanje družbenih, političnih in gospodarskih institucij, zakonov in politik, ki skupaj zagotavljajo pravičnost in enakopravnost. Nekateri ga uporabljajo za poimenovanja gibanj, naravnanih k vključenosti, samoodločbi ali drugim ciljem posameznikov in skupin, ki so trenutno ali zgodovinsko zatirana, izkoriščana ali marginalizirana (Rawls 1971; Duignan 2025). V ožjem smislu, se pojmovanje socialne pravičnosti nanaša na distribucijsko pravičnost, ki poudarja pravične porazdelitve družbenih, političnih in ekonomskih koristi in bremen.

Ekonomska ali distributivna pravičnost, je sestavni del ekonomije socialne pravičnosti in blaginje. Njen temeljni namen je ustvariti moralna in etična načela za graditev takšnih gospodarskih subjektov, ki bi vsakemu posamezniku omogočila zagotoviti zadostne materialne temelje za dostojno, produktivno in ustvarjalno življenje (Hayes 2023). Ta oblika pravičnosti se usmerja k ideji pravičnih deležev koristi in virov, ki so na voljo. Po Miller (1976) je distributivno pravičnost mogoče opredeliti skozi zasluge, pravice in potrebe, ki predstavlja jo nerazdružljive etične sisteme in nujen pogoj za etično reševanje konfliktov med ljudmi ter med ljudmi in naravo. V Milerjevem pojmovanju pravičnosti, to pomeni, da morajo nagrade ustrezati posameznikovemu prispevku k družbi. Porazdelitev potreb pa naj bi pomenila, da bi ljudje, ki potrebujejo več, dobili več, za razliko od tistih, ki imajo dovolj. Pri takšnem vrednotenju pravičnosti je pomembno, da ekonomsko pravičnost obravnavamo skozi segment socialne in družbene solidarnosti. Medtem ko so zlorabe politične moči in vpliva na odločevalske strukture, vzrok za neupravičeno bogatenje, oziroma za nepošteno ekonomsko distribucijo. Čeprav naj bi si ekonomska pravičnost v današnjem času prizadevala za odpravo neenakosti, ki jo ustvarja kapitalizem, se anomalije nepravilne okoljske distribucije dogajajo tudi v drugih družbenopolitičnih sistemih in državnih totalitarizmih. Izrazit primer ekonomske napravičnosti, so privatizacije družbene lastnine v nekdanjih *socialističnih državah*, oziroma prodaja strateških potencialov države tujcem. Oboje je primer nepravilne distribucije, z daljnosežnimi družbenimi, ekonomskimi in političnimi posledicami, ki v nepravilnem položaju postavljata prihodnje generacije.

Okoljska pravičnost. Začetek okoljske pravičnosti lahko umestimo v leto 1982, ko se je pretežno afroameriška skupnost v okrožju Warren v Severni Karolini (ZDA) uprla nezakonitemu odlagališču nevarnih odpadkov v njihovi neposredni bližini. Pojem okoljske nepravilnosti je v terminologijo prvi vpeljal Bullard leta 1990 v svojem delu *Dumping in Dixie: Race, Class and Environmental Quality*, v katerem se je kritično odzval na vse večjo in z raso segregacijo motivirano okoljsko degradacijo v ZDA.

Greenpeace (2023) okoljsko pravičnost definira kot koncept, skovan v zgodnjih šestdesetih letih prejšnjega stoletja med gibanjem za državljanske pravice, nastalim iz spontanega okoljskih, aktivističnih gibanj na začetku nebelih skupnosti, ki so se zoperstavile izpostavljenostim škodljivim praksam na Zahodu (najprej v ZDA). Boyne in Powel (1991) okoljsko pravičnost dojemata kot razmere,

ki ljudem omogočajo dostojno življenje in prihodnost v okviru javno dostopnih ter zagotovljenih dobrin.

Same World (2016) jo definira kot *pravico »družbe in njenih posameznikov, da živijo v zdravem okolju glede na svoje želje in kulturo, ne da bi jim pri tem škodovala ali na njih vplivala gospodarska dejavnost«*. EPA (2024) ter Low in Gleeson ([1998] 2021), definicijo okoljska pravičnost razširita na pravično in pošteno obravnavo, ki smiselno vključuje vse ljudi, ne glede na spol, nacionalno pripadnost, raso, barvo kože, plemensko pripadnost, invalidnost ali dohodek, pri oblikovanju razvoja, izvajanju in izpolnjevanju okoljskih zakonodaj, predpisov ter politik, ki vplivajo na zdravje ljudi in okolje. Hkrati pa določa, kakšni pogoji morajo biti zagotovljeni vsem, da omogočajo oblikovanje polisi na način, »da so ljudje v celoti zaščiteni pred nesorazmernimi in škodljivimi vplivi na zdravje ljudi in okolje« (EPI 2023).

Okoljska pravičnost zasleduje dve osnovni ideji. Prva poudarja pravico do varnega in čistega okolja za vse ljudi (Bullard in Wright 2009). Druga pa sledi ideji, da so nekateri ljudje in okolja degradacijam in negativnim okoljskim vplivom izpostavljeni bolj nepravilno kot drugi (Schlosberg 2013). Rasno in razredno izpostavljene skupnosti (indijanske in črnske v ZDA, aborigini v Avstraliji, domorodci na Papui Novi Gvineji ali ubobožani kmetje v Latinski in Srednji Ameriki) so nepravilni okoljski kvaliteti, tveganjem in nepoštenim deležem okoljsko spornih rab zemljišč (Low in Gleeson [1998] 2021) izpostavljeni bolj kot bogati ali vplivni (močni) posamezniki in skupine. V kontekstu (okoljske) pravičnosti tudi v razviti Evropi obstajajo območja, ki so bila, so ali še bodo izpostavljena okoljski nepravilnosti. Težnje po proizvodnji litija na Zahodnem Balkanu, kažejo na izrazit primer delovanja vladajoče politiki in korporacij po principu NIMBY, pri katerem dobiček korporacij še vedno prevladuje nad interesi skupnosti.

Politična pravičnost. Politično pravičnost lahko opredelimo kot proces iskanja in ustvarjanja takšnega institucionalnega okvira, ki bi vsem državljanom zagotavljal pravičen, enakopraven in za diskurzivne argumente dostopen prostor. Temeljni namen politične pravičnosti je oblikovanje koncepta, ki se ukvarja z reševanjem vprašanj, kako in s kakšnimi sredstvi doseči cilje večje družbene pravičnosti, skozi specifične družbene, politične in gospodarske koncepte v praksi (Piketty 2014). Po Low in Gleeson ([1998]2021) je politična pravičnost, zagotavljanje in spoštovanje neodtujljive pravice ljudi pri zadovoljevanju njihovih osnovnih potreb in potreb družbe, pri čemer je recipročnost osrednji koncept politične koncepcije pravičnosti. Politična pravičnost si torej prizadeva k oblikovanju družbenih institucij, ki omogočajo uveljavljanje načel pravičnosti v najširšem družbenem pomenu.

Hkrati predstavlja najpomembnejši cilj države in družbe, ki določa načela in aktivnosti človekovega delovanja, ki v vsaki družbi določajo namen politiki in pravu (Low in Gleeson [1998]2021). Skozi izoblikovane pravice in dolžnosti pa osmišlja človekov odnos do narave in okolja, soljudi in skupnosti, v kateri živi in ustvarja.

Največji problem pri zagotovitvi pravičnosti je, implementacija v praksi. Tako kot je vpeljava učinkovitih okoljskih in družbenih konceptov vzdržnosti, podrejena kapitalu in politiki najmočnejših in najbolj vplivnih držav, je tudi vpeljava konceptov pravičnosti podrejena moči in vplivu.

Tudi prevladujoči družbeni sistem kapitalizem in njegova radikalna oblika neoliberalizem, kljub zavezanosti temeljnim oblikam svobode in demokraciji ostaja podrejena koristim privilegiranih skupin (Klein 2015). To pa povzroča poglobljanje nepravičnosti in postavlja pod vprašaj idejo demokracije v neoliberalizmu, ki je po Polanyi ([1944]2007) utopična, saj se sistem ohranja skozi nedemokratski aparat nasilja in avtoritarnosti.

Med območja, ki so najbolj izpostavljena nepravičnosti, bi lahko navedli rudarsko-industrijska območja, ki so se zaradi specifičnih in intenzivnih dejavnosti, škodljivih praks in vztrajanj zgolj pri dveh e-jih, energiji in ekonomiji, soočila z različnimi oblikami nepravičnosti. Ob primeru regije Zasavje in skozi kritično konstruktivni pregled osnovnih oblik (ne)pravičnosti bomo opisali vzroke in posledice stanj v okolju, ki so nekoč ekonomsko drugo najuspešnejšo regijo potisnile v primež okoljske, ekonomske in družbene stagnacije.

(NE)PRAVIČNOST IN NEKOČ INDUSTRIJSKA REGIJA ZASAVJE

Zasavje je najmanjša statistična regija, ki so jo do leta 2015 sestavljale zgolj tri občine¹; Zagorje ob Savi, Trbovlje in Hrastnik. Hkrati pa predstavlja sinonim industrijske in sežigalniške regije, ki se dandanes srečuje s številnimi oblikami nepravičnostmi.

Če so v teoretičnem delu opisane temeljne oblike pravičnosti in ukrepi za njihovo izvajanje, lahko za nekoč rudarsko industrijsko regijo trdimo, da so bile v Zasavju zaradi gospodarskih in političnih interesov nepravičnosti izrazito izražene.

Ekonomska in socialna nepravičnost

Temelje današnjega stanja lahko pripišemo najdbi rjavega premoga v 19. Stoletju in tedaj v času industrijske revolucije, vse večjim potrebam po primarnem energentu, premogu, ter pozneje, zaradi potreb industrije, še sekundarnemu viru, električni energiji. Že v obdobju ekspanzije rudarstva, so se pojavljali zametki ekonomske in socialne nepravičnosti. Izkoriščanje delavcev, v obdobju do šestdesetih let prejšnjega stoletja pa tudi težke delovne razmere, so bistveno vplivali na družbene, socialne ter ekonomske razmere delavcev. Nepravičnost je stopnjeval še odnos kapitalistov, lastnikov rudnikov in tovarn, ki so z delavci ravnali tako, kot to kapital počne danes. Izkoriščanim delavcem so se manjšale mezde, večale so se socialne stiske, naraščala je revščina. Od industrijske revolucije naprej ter med obema svetovnima vojnoma do sredine šestdesetih let prejšnjega stoletja so socialno in ekonomsko nevzdržne razmere povzročile, da so se

¹ Zasavsko regijo so do 1.1.2015 tvorile samo tri občine. Regiji se je po tem datumu priključila še Litija.

»knapi« posluževali tudi za lastnike kapitala najbolj bolečih opcij, stavk. Januarja 1958 je v Zasavju stavkalo 5.200 rudarjev zaradi nizkih plač in delovnih razmer, kar je bilo za takratne oblastnike nekaj nezaslišanega (Vzajemnost 2015; RTV SLO 2023). Stavka kaže na dejstvo, da so se tudi v obdobju socializma po drugi svetovni vojni dogajale številne ekonomske in socialne stiske, zato jih ne moremo označiti zgolj kot anomalijo kapitalizma.

Kljub socialnim nepravilnostim v regiji, ki so že v polpretekli zgodovini kazale na pojav nepravilnosti (če izvajamo okoljske degradacije), lahko za obdobje zadnjih nekaj desetletij oziroma do zaprtja rudarstva in energetike trdimo, da sta bili obe dejavnosti do drugih poklicev v privilegiranem položaju, saj je za njima stala država. Če je za delavce v rudarstvu in energetiki pri ohranitvi njihovega socialnega statusa ustrezno poskrbelo država s prerazporeditvami, upokojevanjem in možnostjo samozaposlitve, se za druge delavce ni. Na udaru socialne in ekonomske revščine so se znašle predvsem *ženske* dejavnosti, saj so delavke (primer Mehanike Trbovlje, Peka, Ipoza) dobesedno čez noč izgubile delo.

Največji problem na ekonomskem in socialnem področju je v regiji nastal po letu 1991. Vpeljava neoliberalnega družbenega sistema je najbolj prizadela delavce v dejavnostih z nizko dodano vrednostjo. Novodobni lastniki proizvodnih sredstev so ob zamenjavi družbenoekonomskega sistema zasledovali zgolj svoje interese, družbeni so bili zapostavljeni ali pa so jih lastniki kapitala kršili. Manjšale so se socialne pravice, omejevalo se je sindikalno delo, delavci so iz lastnikov kapitala (deloma tudi zaradi lastninskih certifikatov), postali zgolj mezdni najemniki. Namesto pričakovanih rešitev in blagostanja, ki naj bi jih liberalni in neoliberalni kapitalizem prinesel, so se zaradi divjega lastninjenja prej družbenih podjetij problemi razplamteli v povečanju ekonomske in socialne revščine.

Že v socializmu, je dodatno težavo pomenilo vztrajanje predvsem lokalnih politiki pri fosilnih virih in energetiki saj ni bilo ustreznih alternativ kaj se bo zgodilo po fosilni eri. Tudi neprilagajanje industrije na morebitne negativne scenarije, zaradi sprememb družbenoekonomskega trga in nekonkurenčnosti, je ob neustreznem odzivu lokalne in državne politiki na novonastale razmere pripomoglo, k nastalemu stanju. Naštete težave so ob razpadu trgov nekdanje skupne države ob osamosvojitvi ter izgube največjih kupcev (vojske), v podjetjih kot sta Strojna tovarna Trbovlje in Iskra, povzročile krizo, ki je rezultirala v izgubi več kot 5.000 delovnih mest (Malovrh 2022). Izguba delovnih mest je po podatkih Centra za socialno delo Zasavje, območnih združenj Rdečega križa (v občinah) in Karitasa, povzročila, da se je število prosilcev denarne socialne pomoči in drugih socialnih transferjev enormno povečalo (Žnidarič 2016). Zaradi izgubljenih delovnih mest, ki jih niso nadomestili, logističnih pomanjkljivosti zaradi neustrezne cestne in železniške infrastrukture ter naraščajočih zdravstvenih, socialno_ekonomskih in okoljskih posledic, se je število prebivalcev v regiji z vsakim letom manjšalo. Med letoma 2008 in 2020 se je prebivalstvo zmanjšalo za 2.297 oseb, največ v Trbovljah za 1.561, nato v Zagorju ob Savi za 1.015 in najmanj v Hrastniku za 736 (SURS in Žnidarič 2021).

Pomanjkanje delovnih mest in socialna kriza ter škodljive prakse, so povzročili, da so mladi iskali delo zunaj regije. Prebivalstvo pa se sodeč po statistiki, stara. Ostala so redka podjetja, kot sta visoko tehnološki Dewesoft in Katapult, od največjih delodajalcev, ki so nekoč zaposlovali tudi po nekaj tisoč delavcev, pa zgolj ETI in Steklarna 1860 Hrastnik, obe v zasebni lasti.

Na začetku članka je bilo poudarjeno, da trem osnovnim oblikam (ne)pravičnosti kot najpomembnejši sklop iz katerega izhajajo temeljni problemi, dodajamo okoljsko problematiko ki je v primeru Zasavja, je ta še posebej pereča. Ne glede na različne politične in gospodarske sisteme v regiji je bilo to območje vseskozi zanemarjeno, kar se dandanes najbolj pozna, ko ga opazujemo skozi časovno distanco posledic obremenjevanja.

Če Zasavje primerjamo z drugimi neindustrijskimi regijami v državi, lahko izpostavimo obremenjevanje, ki je zaradi specifičnih vremenskih in geografskih danosti območja in velikega števila tovarn na majhnem prostoru bistveno vplivalo na negativno okoljsko in posledično socialno stanje v regiji. Neustrezni tehnološki sistemi v največjih obremenjevalkah prostora (TET in cementarni) ter težnje po energentih, energiji in dobičku, so ob zanemarjanju okoljskih vsebin desetletja vplivali na kakovost življenja v regiji, po letu 1976 in izgradnji 360-metrskega dimnika pri TE Trbovlje pa še na območja sosednjih držav. Do tega leta (1976) so bili prebivalci regije, delavci v tovarnah, predvsem pa narava in okolje, izpostavljeni obremenjevanju s prašnimi in plinastimi delci, ki so se nalagali v okolju, zemljinah in ljudeh. Posledice tega obremenjevanja so rakava obolenja, ki so v Zasavju pogostejša kot v drugih neindustrijskih regijah, kar so potrdile tudi do sedaj opravljene študije (Ribarič Lasnik in sod. 2001; Onkološki inštitut 2008; Vudrag, 2008). Industrijsko obremenjevanje so študije opredelile kot temeljni vzrok za nastale zdravstvene in socialne razmere.

Če se ob zdravstvenih težavah, v kontekstu nepravičnosti navežemo še na dejstvo, da so tla še vedno obremenjena s PTE-ji (prej težke kovine), da sta kakovost in količina ustrezne prehrane v regiji, zaradi usedlin v tleh vprašljivi, na nekaterih območjih pa celo nevarna za zdravje, je Zasavja v primerjavi z drugimi regijami tudi v tem pogledu zapostavljeno.

Okoljska pravičnost

V Zasavju lahko pojem okoljske pravičnosti povezujemo z različnimi področji in problemi. Lahko jih obravnavamo kot tehnološke in sistemske, tehnološke zaradi rabe neustreznih sistemov filtriranja in velikega števila obremenjevalcev na majhnem in specifičnem območju, ki so rezultirala v presežnih emisijah obremenil; sistemske zaradi podpore politični do obremenjevalcev in neustreznega vrednotenja obremenjevanj (opisano v predlogu rešitev).

Za lažjo predstavbo o obremenitvah so v Tabeli 1 podatki o emisijah iz TE Trbovlje med letoma 1980 in 1999. Rabe premoga v kotlih za produkcijo pare, brez kakršnihkoli filtrirnih sistemov so s prahom in delci obremenjevali vplivna

območja tovarn. Do leta 1976 (pred izgradnjo 365-metrskega dimnika) so bile emitirane količine obremenil še večje od navedenih v Tabeli 1.

*Tabela 1: PROIZVODNJA ELEKTRIČNE ENERGIJE V TET, KOLIČINE PORABLJE-
NEGA PREMOGA IN EMISIJE IZ ELEKTRARNE MED LETOMA 1980 IN 1990*

Leto	Elektrika (MWh)	Premog (t)	SO ₂ (t)	No _x (t)	CO ₂ (t)	Prah (t)
1980	487.303	600.284	23.434	1.669	586.925	534
1981	426.646	477.711	20.517	1.328	467.080	470
1982	485.321	598.813	23.339	1.665	585.487	645
1983	543.596	673.633	26.141	1.873	658.642	789
1984	605.610	687.485	29.123	1.911	672.186	870
1985	449.529	574.061	23.844	1.596	561.286	781
1986	476.501	519.074	22.915	1.443	507.523	710
1987	617.150	705.679	30.880	1.962	689.975	1.283
1988	374.185	415.137	17.994	1.154	405.899	985
1989	659.480	713.222	31.714	1.710	697.350	1.403
1990	552.534	597.210	25.607	1.606	583.920	1.047
1991	509.481	554.562	21.899	1.323	542.221	800
1992	650.396	746.127	28.661	2.071	729.523	943
1993	621.183	631.321	23.380	1.805	617.272	1.404
1994	662.962	662.962	28.637	1.997	648.208	1.758
1995	614.083	704.826	25.576	1.530	689.141	1.259
1996	531.767	528.798	22.835	1.203	593.796	503
1997	ni podatka	ni podatka	31.244	1.550	727.040	374
1998	ni podatka	ni podatka	33.372	1.478	765.036	252
1999	ni podatka	ni podatka	30.229	1.650	647.087	260
skupaj	9.267.727	10.390.905	521.341	32.504	12.375.597	17.070
povprečje	545.160	611.230	26.067	1.625	618.780	854

Vir: Poličnik 2008.

Izmerjene vrednosti (emisij) so bile v najbolj kritičnih zimskih obdobjih tolikšne, da jih takrat uporabljeni instrumenti niso mogli niti izmeriti. Vrednosti so bile v območju 20.000 µg/m³ in več (dopustna vrednost znaša 350 µg/m³). Po svojih izkušnjah takratne razmere z izpusti SO₂ in prahom lahko opišemo kot katastrofalne. V vasi (Dobovec), ki se razteza nasproti dimnika na nadmorski višini 650 metrov, bi lahko takratne razmere primerjali z današnjimi v New Delhiju, Pekingu ali Sarajevu ob najhujših obremenitvah. Če temu dodamo še podatek, da smo se do leta 1991 prebivalci ruralnih območij, oskrbovali z vodo iz kapnice,

ki so izpirale strehe kontaminirane s prašnimi delci in kovinami, lažje razumemo zdravstveno problematiko. Lokalne razmere glede obremenjevanja so se, kot je bilo že omenjeno, delno izboljšale 1976, ob izgradnji 360-metrskega dimnika, pa še le z reševanjem problemov pri koncu pipe. Zaradi dimnika so se delno rešile težave na lokalnem območju, razširile pa so se na območja sosednjih držav. Stanje z izpusti obremenil v okolje se je v Zasavju izboljšalo šele ob namestitvi dveh razžvepljevalnih naprav v cementarni in TET po vstopu Slovenije v EU po letu 2005 in vpeljani strožji okoljski zakonodaji. Občutno bolje pa je zdaj (2025), ker obe tovarni trenutno ne delujeta.

Porast zdravstvenih težav zaradi obremenjevanja s prašnimi delci lahko povežemo še z degradacijami v naravi in okolju. Zaradi obremenjevanj v plinastem stanju (predvsem SO₂) in drugimi obremenili, je bilo do leta 1976 poškodovanih več kot 5.000 hektarov gozdov (Vidregar Gorjup in Batič 1999).

Kovine v tleh (kovine, danes PTE-ji) so zaradi razpolovne dobe na izpostavljenih območjih vplivale na prehransko samooskrbo prebivalcev in na vsa živa bitja. Proizvodnja mleka je bila na vplivnih območjih omejena, prepovedana je bila uporaba notranjih organov srnjadi (Pokorny 2000 v ERICO 2001). Na vplivnih območjih obremenjevanj je zaradi nereševanja problemov s kovinami, ter njihove dolgotrajne navzočnosti v zemljinah, še dandanes vprašljiva pridelava nekaterih povrtnin za lastno uporabo. Povrtnine z večjim transpiracijskim potencialom hranil iz zemlje, kot so krompir, endivija in peteršilj, lahko pomenijo zdravstveno tveganje, če bi jih uporabili v prehrani.

Kljub že dotlej žgoči okoljski problematiki se je obremenjevanje v okolju nadaljevalo. Z dovažanjem nevarnih odpadkov na deponije RTH in cementarniške površine nad mestom (v zadnjem desetletju predvsem v občini Trbovlje) so se okoljske obremenitve povečevale, nevarnost dodatne kontaminacije zaradi izcednih vod iz deponij pa stopnjevala. Ne glede na odziv javnosti in pozneje sprejeti odlok o nadzoru nad dovažanjem odpadkov so te na odlagališčih neustrezno vnašali v prostor. Izjava takratnega direktorja RTH, da v podjetju ne bi imeli dobička, če bi upoštevali vsa priporočila o umeščanju odpadkov v prostor, je pokazala, da je dobiček znova prevladal nad interesi prebivalcev po zdravem in čistem okolju.

Tudi izboljšanje razmer po rudarstvu je bilo v treh zasavskih občinah, kljub znatnim finančnim državnim sredstvom (250 milijonov evrov plus 10 milijonov evrov), glede na rezultate, neustrezno, netransparentno in neučinkovito.

K trenutnim problemom je znatno pripomogel tudi prenos lastništva cementarne v roke tujega kapitala, ki je s sežiganjem odpadkov, ob podpori lokalnih in državnih političnih struktur, desetletja obremenjeval že tako degradirano okolje. Kljub temu da je sežiganje odpadkov druga najslabša možnost ravnanja z odpadki, (takoj za odmetavanjem v prostor) ter kljub dejstvu, da so strokovnjaki že pred svetovno vojno, opozarjali, da okolje v regiji zaradi omenjenih specifičnih naravnih danosti ne dopušča neomejenega števila industrijskih objektov (Orožen 1974), se je škodljivo delovanje nadaljevalo. V primeru cementarne se je

delovanje tujcev ravnalo po načelu NIMBY, po katrem se po Kirn (2012) dobički selijo v tujino, prebivalcem pa ostajajo problemi zaradi obremenjevanja okolja.

Če so bile v zahodnem svetu okoljskim in socialnim katastrofam izpostavljene nebele in družbeno zapostavljene skupnosti, staroselci, in revni sloji prebivalstva, lahko v primeru Slovenije to trdimo za Zasavje. V tem kontekstu bi lahko zapisali, da je bilo Zasavje zaradi razvoja in neustreznih, nedružbenih politiki in politiki, usmerjenih zgolj v izkoriščanje človeških in naravnih virov, nepravilnostim izpostavljeno območje. To lahko utemeljimo z ravnanjem lokalnih in državnih politiki, saj politiki kljub dokazanim vzrokom zdravstvenih in okoljskih problemov, s katerimi so se srečevali prebivalci, niso ustrezno pristopili k reševanju žgoče problematike v regiji. Zato lahko v luči nastalih težav v zasavski regiji trdimo, da so prav okoljski problemi in rast okoljske nepravilnosti, temelji problemov s katerimi se regija srečuje dandanes.

Politična pravičnost in Zasavje

V vseh družbenih sistemih igra politiki pomembno vlogo. Prvič, ker skozi organe oblasti kreira politiki, ki naj bi skozi institucije vsem državljanom zagotavljale vladavino prava, in drugič, ker vzpostavlja in regulira »zapovedi«, ki državljanom omogočajo, da kot svobodni in enaki pod enakimi pogoji sodelujejo z drugimi državljani (Low in Gleeson ([1998]2021). V kontekstu politične pravičnosti se postavlja vprašanje, kako bi morale biti oblikovane institucije prevladujočega sistema, da bi v okviru zasebne lastnine in tržne menjave utelešale pravičnost, ki bi bila prevladujoča, oziroma koliko in na kakšen način bi te institucije morale nadgraditi in usmejati diskurzivna politiki v javni sferi. Zato se politična pravičnost ukvarja z vzpostavljanjem takšnih institucij, ki bodo pravičnost omogočile skozi nepristransko presojo (Rawls 1971; Low in Gleeson [1998]2021); Kirn 2012, 2014).

Pri zagotavljanju enakosti vsem in v praksi tudi pod enakimi pogoji oziroma po analizi enakopravne obravnave pred organi oblasti lahko za razmere v Zasavju trdimo, da so bile vse politiki do sedaj, ne glede na različne družbene sisteme, usmerjene zgolj v zagotavljanje interesov po virih oziroma, po Lukšič (2022), v materialno produkcijo. Ni pa bila zagotovljena pravičnost z uveljavitvijo pravila, ki bi omogočalo poštene razmere delovanja družbe v prostoru oziroma, širše, zagotovilo enak položaj regije do drugih v državi.

Prebivalci regije so bili pri odločanju in upravljanju, po Gosar (1934) o vseh relevantnih zadevah v Zasavju omejeni s politično in kapitalsko sfero, kritična javnost je še dandanes zapostavljena. K apatičnosti prebivalcev regije do okoljskih katastrof in kritik obremenjevalcev je pripomogla tudi zdravstvena stroka s skrivanjem podatkov o obremenjevanjih in njihovih posledicah. Delovanje politike in kapitala se je odražalo tudi pri odzivih na kritike obremenjevanja, ki so se dejavno začele stopnjevati v začetku 21. stoletja. Zaposlene v največjih obremenjevalkah, predvsem tiste iz okoljsko najbolj izpostavljenih območjih, so vodstva podjetij ob kritikah škodljivih praks izpostavljala grožnjam z izgubo delovnih

mest. Čeprav je takšna praksa pritiskov na prebivalstvo značilna večinoma za kapitalistično ureditev, tudi socialistična v preteklosti zanj ni bila imuna, kar znova potrjuje prepričanje, da so si vsi politični sistemi do sedaj, namenoma in zaradi lastnih koristi, zatiskali oči, pred okoljskimi problemi v regiji. Ob tem je posebej zaskrbljujoče, da doslej ni bilo ustrezne skupne lokalne polisi, v razmerju do žgočih, okoljskih vprašanj, kar so kot enega največjih problemov v regiji, izpostavili tudi anketiranci². Redka izjema pri opozarjanju na okoljske probleme v regiji, je bila občina Zagorje ob Savi.

Odnos državne politike do regije se kaže na primeru cementarne v Trbovljah. Tujemu kapitalu je državna politika (ob podpori občinske) omogočila sežig odpadkov. Inšpekcijske službe pa so odkrito z nasveti, neodzivnostjo na opozorila posameznikov in civilne družbe (Eko krog in drugi) na za okolje škodljiva delovanja tovarne, podjetju svetovala, kako reagirati na prijave. Tudi primer tožbe zasavskih kmetov proti največjim obremenjevalcem je dokaz za, nepravičen in neenak položaj v pravni zadevah. Kapital je deloval z neomejenimi sredstvi, ter časovnim in pravnim izčrpavanjem, kmetje pa s svojimi omejenimi sredstvi. V vseh teh primerih so država, njene institucije in politiki do prebivalcev regije ravnale nepravilno in moralno sporno.

Posledice nereševanja nakopičenih problemov v regiji so očitne. Vzrok za nje pa prebivalci regije vidijo tudi v pomanjkljivih skupnih, občinskih politikah (anketa Žnidarič 2021). V regiji je zato treba spremeniti apatijo do politiki in to z vključitvijo vseh zainteresiranih akterjev v procese oblikovanja in odločanja o polisih na enakopraven in pošten način (relevantne informacije, enak odnos do vseh). Primeri dobrih praks iz Skandinavije in Nizozemske kažejo (Low in Gleeson [1998]2021), da so soglasno sprejete odločitve vseh akterjev v prostoru najboljša pot za reševanje nakopičenih problemov.

MOGOČE REŠITVE ZA DVIG RAVNI PRAVIČNOSTI V ZASAVJU

Zaradi škodljivih praks je treba najprej ugotoviti kakšno je stanje v prostoru. Od zadnje celovite študije je minilo že skoraj četrto stoletje (ERICO 2001). Sredstva iz različnih evropskih skladov so na voljo. Zato je potrebno (na osnovi celovitih analiz) pripraviti ustrezne programe, ki bodo usmerjeni v zeleno prihodnost. Zaradi ekonomske in socialne stiske, ki se po podatkih pristojnih služb (Rdeči križ, Karitas, CSD Zasavje) pogloblja, je potrebna usmeritev v skupnostne projekte, ter ukrepanje glede prehranske in energetske revščine. Oboje vpliva tako na kakovost življenja prebivalcev regije kot na dodatno obremenjevanje okolja. Prehransko revščino bi zaradi še vedno kontaminiranih tal lahko zmanjšali ali omejili s pomočjo ekoremedicijskih metod, z dvignjenimi ali visečimi vrtovi itd. Najhitrejša pot bi bila zamenjava kontaminiranih zemljin z neoporečnimi,

² Anketa za potrebe doktorske disertacije je bila opravljena leta 2021. Zajela je prebivalce treh, do leta 2015 konstitutivnih občin regije Zasavje. V anketi so bila zastavljena vprašanja o vseh za prebivace pomembnih področjih, od okoljskega, socialno ekonomskega ter političnega.

vendar je ta možnost najdražja, še posebej če so kontaminirane zemljine obravnavane kot nevarni odpadki (Žnidarič 2011; Vovk Korže 2017).

Za omilitev energetske revščine, je sisteme ogrevanja treba tehnično preoblikovati na način, ki bo omogočil izrabo svojih lastnih virov. V primeru občine Zagorje ob Savi se je prehod na les in lesno biomaso izkazal kot pravilna odločitev. V luči zmanjšanja energetske odvisnosti in posledic rabe fosilnih goriv, ogljičnega in vodnega odtisa, ob koronski in še posebej plinski krizi se je oskrba z lastnimi energenti izkazala kot najprimernejša. Biomasa in solarna tehnologija lahko bistveno pripomoreta k manjšim obremenitvam prostora in pri dvigu energetske samooskrbe. Težnje, ki se pojavljajo v zadnjem obdobju, da naj bi se pozidala še zadnja območja reke Save za potrebe hidroelektrarn, so okoljsko škodljive, saj prinašajo več negativnih vidikov: izguba določenih živalskih vrst, potencialno realno nevarnost za kontaminacijo in nižanje podtalnice, s katero bi se zmanjšala tako kakovost kot zaloga pitne vode (Žnidarič 2023). Nenazadnje se pozablja še na intrizično vrednost neokrnjenih voda in okolja za kakovostno življenje.

V kontekstu produkcije energije in deleža Zasavja k skupni energetski preteklosti bi bilo treba upoštevati zgodovinsko in okoljsko stanje v regiji, ki je zaradi energetike utrpela takšne posledice, ki jim druge regije niso (bile) izpostavljene. Zato v regiji ne bi smeli dopustiti nobenega dodatnega obremenjevanja več. Še posebej, ker bi količino energije iz hidroelektrarne na srednji Savi lahko pridobili iz sončnih elektrarn, postavljenih na degradiranih in dandanes neizkoriščenih površinah.

Ukrep, ki bi pripomogel k izboljšanju stanja v regiji bi bila sprememba zakonodaje. Za degradirana območja bi morala obstajati strožja okoljska zakonodaja ob morebitnih posegih v okolje. Namesto prilagajanja zakonodaje kapitalu, kot je bilo to v primerih Magna, C0 (kanalizacija v Ljubljani), bi se morala politiki in polisi usmeriti v interese družbe in okolja. Anhovo je lahko primer, kako naj bi politiki zaščitile že tako degradirano okolje in prebivalce, pa čeprav so se obremenjevanja tudi tam tako kot v Zasavju, dogajala desetletja.

Problem pri vrednotenju obremenjevanja v prostoru, je tudi v številu obremenjevalcev in specifičnih naravnih pogojih. Četudi vse tovarne delujejo v zakonskih okvirih, je njihova skupna akumulacija obremenil lahko večkratno prekoračena. Gledano s tehničnega vidika, bi morali meritve in kontrole opravljati neodvisni strokovnjaki, da ne bi prihajalo do potvarjanj rezultatov, inšpekcijski ukrepi pa bi se morali izvajati nenapovedano in v različnih časovnih obdobjih in ne kot sedaj, ko so napovedani. V praksi to pomeni, da ob napovedani kontroli obremenjevalci delujejo znotraj predpisanih norm, kasneje pa spet nadaljujejo nedopustno delovanje v okolju.

Tretji korak k zmanjševanju nepravilnosti bi bila brezpogojna in enakovredna vključitev akterjev v postopke oblikovanja polisi. Zanj bo treba dvigniti raven zaupanja v delovanje političnih organov. Praksa in tudi anketa (Žnidarič 2021) sta pokazali, da bi se prebivalci vključili v oblikovanje polisi, vendar še

najmanj skozi politiki, ker so vanjo izgubili zaupanje. Za dvig ravni zaupanja pa bi bilo treba vzpostaviti možnost odpoklica izvoljenih predstavnikov ljudstva, če ne bi delovali v interesu ljudi, ki so jih na položaj izvolili, in onemogočiti vpliv politike na sodno in izvršilno vejo oblasti.

SKLEP

Zaradi vse številčnejših in naraščajočih družbenih in okoljskih konfliktov sodobne družbe razumevanje pravičnosti postaja pomemben dejavnik pri oblikovanju razmerij sodobne družbe. Prepoznavanje njenega bistva in temeljnih značilnosti nam omogoča iskanje tistih stičnih točk, ki lahko konflikte v prostoru odpravijo ali jih v prihodnosti onemogočijo.

Razumevanje pravičnosti v obdobju kompleksnih stanj v družbi in okolju določa, kakšna naj bo družba prihodnosti oziroma kakšna mora biti politična in okoljska etika, da do različnih oblik pravičnosti sploh pride. Vedenje o tem, kaj pravičnost sploh je in kakšen je njen pomen v sodobni družbi, nam pomaga koncipirati pravičnost in oblikovati politično-etični okvir, ki naslavlja tiste grožnje, s katerimi se družba kolektivno sooča (Low in Gleeson [1998]2021, 14). Za oblikovanje družbe po meri novih koncepcij pravičnosti je zato pomembno, da se neposredno in konkretno pokaže, zakaj so spremembe potrebne ter zakaj so trenutna sredstva in ukrepi v spopadu z okoljskimi problemi in konflikti neustrezni.

Zato je pomembno, da skozi boj za pravičnost v realnem svetu opredelimo povezave med abstraktnimi koncepti in realnimi dogodki. Določiti je treba nove koncepte pravičnosti skozi oblikovanje rešitev, ki bodo nadomestile okoljsko in družbeno destruktivne družbene forme ter omejile okoljske krize in degradacije. Ker predstavlja pravičnost živ in spreminjajoč se koncept družbenoekoloških razmerij med akterji (v prostoru), je rešitve treba nenehno prilagajati trenutnim družbenim, okoljskim in prostorskim razmeram, saj ne obstajajo univerzalne, enovite rešitve. Za ustrezno in učinkovito izpeljavo pravičnosti v okolju, naravi in ljudeh je (zaradi trdoživosti prevladujočega družbenega sistema) treba zasledovati okoljske cilje skozi preoblikovano vladavino prava, ki bo od korporacij (kot največjih proizvajalcev problemov v prostoru) zahteval, da morajo slediti ohranjanju planeta na način, ki omogoča vključiti etiko in pravičnost v družbeno in globalna okolja (Low in Gleeson [1998]2021, 37–38).

Kakor obstajajo različni koncepti razvoja družbe skozi čas, so tudi razlike v odnosu človeka do okolja in narave. Staroselske kulture so z naravo živele, jo varovale in iz nje vzele le toliko, kolikor so za preživetje potrebovale. Današnje destruktivno ravnanje razvitega sveta sledi zgolj potrošniški mentaliteti ter ustvarjanju čim večjih koristi posameznikom in elitam, ne glede na okoljsko degradacijo in uničenje ter vse izrazitejše negativne posledice takšnega ravnanja. Miselnost, ki prevladuje, obravnava naravo zgolj kot neizčrpen vir za zagotavljanje udejanjanja človekovih interesov (Dryzek 2018). Pomanjkanje virov pa je zaradi vse številčnejše populacije, predvsem pa nepoznavanja omejitev okolja

in prostora ter prevladujoče usmerjenosti človeštva v ekonomske učinke temelj konfliktov in nepravilnosti.

Če sta Low in Gleeson ([1998]2021) pravičnost opredelila kot kontinuirani človeški nalogi, ki skozi izvajanje in iskanje pravičnosti v sleherni družbi določata namen politiki in pravu, lahko v primeru Zasavja trdimo, da je bila pravičnost, ki bi ju morali družbi zagotavljati prav politično in pravo, zanemarjena, polisi v regiji pa podrejene zagotavljanju interesov po virih.

Opisani primeri okoljskih in socialnih problemov v regiji so izraziti primeri posledic nerazumevanja pomena okolja in narave ter njune intrinzične vrednosti, ki jo prepoznamo, šele ko jo izgubimo. Zato razumevanje pravičnosti v prostoru postaja pomemben dejavnik pri iskanju tistih stičnih točk v razmerjih sodobne družbe, ki nam bodo omogočile konflikte omejiti ali odpraviti. Vprašanja, ki se ob tem pojavljata, pa sta, ali smo se kot družba pripravljene soočiti s problemi ter drugo, kateri mehanizmi so potrebni, da bomo konflikte v prihodnosti omejili? Če se ozremo na delovanje razvitih gospodarstev Zahoda ali Severa, ki so svoj razvoj gradila na izkoriščanju kolonij in v zadnjih desetletjih na principu NIMBY, je odgovor jasen. Dokler razviti svet ne sprejme odgovornosti za svoja dejanja v preteklosti in ne spremeni političnega delovanja v smeri družbenih konceptov, se ne bo zgodila ne okoljska ne družbena preobrazba.

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THE MINING AND INDUSTRIAL REGION OF ZASAVJE, VIEWED THROUGH VARIOUS FORMS OF (IN)JUSTICE

Abstract. *In the article, the author deals with the issue of the crisis facing the industrial mining region of Zasavje and what has caused its problems over time. Through an analysis of justice, the author constructively and especially critically examines the consequences of the situation in the region that has brought the once economically prosperous region into the grip of environmental and social stagnation. Different segments of injustice are illuminated via specific actions of national and local decision-makers and politicians and politicians in the region. Constructive critical analysis leads the author to find causes that, alongside environmental degradation due to the impacts of long-term intensive and non-ecological industrial activity in certain geographical and weather conditions, has seen the region suffer environmental, social and social injustice. In the concluding part, the author focuses on social systems and the reasons explaining the lack of critical public attention to how industry in the region has functioned and solutions aimed at its use by society, the environment and nature by way of a transformed rule of rights and decision-making structures. At the same time, such solutions can reduce irregularities in the region.*

Keywords: *Zasavje, mining and energy region, environmental justice, non-environmental and non-ecological practices, rule of law, constructive critical analysis.*

PRIKAZI, RECENZIJE

João Vale de ALMEIDA

**THE DIVORCE OF NATIONS:
A DIPLOMAT'S INSIDE VIEW ON
THE GLOBAL ORDER COLLAPSES**

Flint Books, London, 2025,

264 strani, 18,99 GBP

(ISBN: 978-1803997674)

Knjiga, ki je izšla pri založbi Flint v Združenem kraljestvu (ZK) v začetku aprila 2025, je prvenec portugalskega zgodovinarja in novinarja z več kot štirimi desetletji izkušenj v Evropski komisiji in evropski diplomaciji. João Vale de Almeida nam iz prve vrste in svojih izkušenj postreže s paletto ključnih zunanjepolitičnih dogodkov ter njihovih zakulisja novega stoletja. Prav tako nam oriše značilnosti posameznih oseb, ki so krojile in obvladovale mednarodne odnose v temu obdobju ter prispevale k razmeram, ki so države in mednarodno skupnost – vede ali nevede – privedle na prag ločitve (med njimi in znotraj njih), in s tem v eno najnevarnejših geopolitičnih obdobj po drugi svetovni vojni.

Avtorjeva diplomatska kariera je impresivna, sega od različnih službovanj v Evropski komisiji v Bruslju, vključno z vodenjem kabineta predsednika Evropske komisije Joséja Manuela Barrosa v prvem mandatu in funkcijo njegovega osebnega odposlanca (šerpe) za G8 in G20, do predstavljanja EU v Washingtonu, New Yorku in Londonu.

Delo ni znanstvena publikacija, temveč nabor avtorjevih izkušenj in osebnih pogledov na velike dogodke in svet moderne diplomacije ter poskus njihove kontekstualizacije v sodobno

realnost in perspektivo aktualne globalne krajine. Kot sam priznava, gre za subjektivni prikaz, saj je na oceno preteklih situacij zagotovo vplivala današnja osebna refleksija in tisto, kar se je vmes zgodilo. Njegovi spomini so tako dobrodošel zapis za dopolnitev bolj podrobnih zgodovinskih in znanstvenih ocen tega obdobja, ki bodo še sledile.

Knjiga nas, ne nujno v striktnem kronološkem pregledu, spomni ter bolj ali manj podrobno popelje skozi ključne geopolitične trenutke zadnjih desetletij, ki jih je Vale de Almeida doživljal in spremljal od blizu, pri nekaterih sodeloval in jih aktivno soustvarjal. Razjasnjuje nam trende razvoja na globalni in nacionalni ravni, kot jih vidi avtor, ki so se začeli že mnogo prej in poglobljali vrzel med tem, kako države in njihovi ljudje dojemajo svet in kako bi želeli videti, da se razvija v prihodnje. Meje med domačo in zunanjo politiko so vedno bolj zabrisane.

Teroristični napad na ZDA 11. septembra 2001 je za vedno spremenil svet in od takrat nič več ni tako, kot je bilo prej. Natančno tri mesece zatem je dokaj neopazno Kitajska postala polnopravna članica Svetovne trgovinske organizacije, kar je sprožilo hiperglobalizacijo v državi in razvijajočem se svetu ter hkrati ustvarilo nova žarišča revščine in neenakosti v razvitem svetu. V razmaku le nekaj tednov smo bili leta 2008 priča ruski invaziji na Gruzijo, ki predstavlja najzgodnejšo kršitev načela ozemelske celovitosti držav po hladni vojni, in propadu banke Lehman Brothers v ZDA, ki je pomenil začetek največje finančno-gospodarske

krize in svetovne recesije, ki je sledila. Prav tako v razponu nekaj mesecev so leta 2016 britanski volivci sledili nasvetu tistih, ki so menili, da je odhod z največjega prostotrgovinskega trga in ločitev od najboljšega partnerja rešitev za globoko zakoreninjene težave z identiteto in prevzem nadzora nad svojimi mejami, ameriški volivci pa so za svojega 45. predsednika (nepričakovano) izvolili Donalda Trumpa. Z obema dogodkoma je populizem dobil svoje mesto v politični hiši slavnih, začelo pa se je tudi obdobje pospešenega ločevanja med državami in znotraj držav. Le malo po največji pandemiji sodobnega časa in popolnem zaprtju držav, ko so se gospodarstva komaj postavljala nazaj na noge, je Putin 24. februarja 2022 brutalno in brezkompromisno napadel Ukrajino. S tem se je dokončno razblinilo še zadnje upanje o dobronamernosti njegovega režima.

Veleposlanik Vale de Almeida spomni, da je bilo na vsakem od več kot desetih srečanj Barrosa s Putinom mogoče opazovati temen značaj ruskega predsednika, globoke zamere in travme zaradi propada Sovjetske zveze, ki so z leti postajale še globlje in bolj črne. Putin je bil razočaran nad ameriško reakcijo po masakru v Beslanu 2004. Izvolitev ukrajinskega predsednika Juščenko istega leta je še poglobila zamero do Američanov in Evropejcev. Zahod ni prepoznal njegovega svarila na Münchenski varnostni konferenci leta 2007 in si je ob ruski invaziji na Gruzijo avgusta 2008 še vedno zatiskal oči. S priključitvijo Krima leta 2014 je prišlo do izključitve Rusije iz skupine G8 in začetka dokončne ločitve Rusije in evroatlantske skupnosti. Kolektivni

neuspeh Zahoda, da bi se prej soočil z Rusijo, je bil strateška napaka, nedvomno največja v tem, kar se je izkazalo kot buren in temen zasak stoletja.

Izbrano, a zelo neposredno, so predstavljeni značaji še nekaterih drugih voditeljev in karizmatičnih sopotnikov z diplomatskega parketa, ki so od preloma tisočletja zaznamovali mednarodno skupnost in jih je avtor srečeval pri svojem delu. Kemija in medosebna naklonjenost (ali njeno pomanjkanje) med svetovnimi voditelji, kot tudi veleposlaniki, sta bistveni za hitro reševanje kriz, ki imajo potencial globalnih pretresov, naklonjenost pa dodatno spodbudi vzpostavljanje zaupanja med državami in solidarnosti v okviru EU.

Nikjer se to ni pokazalo bolj očitno kot pri urejanju ločitvenega postopka po nepričakovanem odhodu ZK iz EU. Boleč razhod med ZK in sedemindvajsetimi članicami EU je najbolj poglobljeno poglavje knjige, saj ga je avtor doživljal od blizu, neposredno v prostorih v središču Londona, kjer je bil nekoč sedež Konservativne stranke. Tam, na Trgu Smith, je namreč po brexitu našla svoj dom Delegacija EU v ZK, ki jo je kot prvi veleposlanik od 31. januarja 2020 do novembra 2022 vodil prav Vale de Almeida.

Ločitev, do katere je lahko prišlo na podlagi 50. člena Pogodbe o EU in opredeljuje postopek prostovoljnega in enostranskega izstopa iz EU, je paradoksalno spisal britanski diplomat lord Kerr. Predstavljala je travmo s številnimi negativnimi posledicami za obe strani, nekoč tesno povezani s človeškimi, političnimi, gospodarskimi in regulativnimi »skupnimi dobrinami«. London se je s predsednikom vla-

de Johnsonom in njegovimi bližnjimi sodelavci odločil za posebej naporen razhod, ki sta ga dodatno otežili pandemija in turbulentna notranjepolitična situacija v državi. Brexita ni mogoče razumeti brez podrobnega razumevanja zgodovinskega odnosa ZK do včlanjevanja v EU in njegovega bivanja v Uniji.

Delegacija EU je sprva delovala v nenaklonjenem okolju, ki je šele po več kot letu dopustilo ustrezno akreditacijo vodje misije in predajo poverilnih pisem veleposlanika kraljici Elizabeti II. Vale de Almeida pravi, da za vodenje misije ni dobil specifičnih navodil ter da so se pretekle izkušnje in podpora skupine veleposlanikov držav članic EU, ki so bili akreditirani pri Dvoru Svetega Jakoba, izkazale kot neprecenljive. Brexit je okrepil enotnost sedemindvajseterice v odnosu do ZK in Britancem ni prinesel niti ene od obljubljenih koristi.

Urejanje ločitvenega odnosa in bolj konstruktivno sodelovanje je bilo oteženo in naporno zaradi nasprotovanja unionistov izvajanju Severnoirskega protokola, ki naj bi zagotavljal, da na Severnem Irskem ne bo trde meje, ter več poskusov vlade v Londonu, kako se z enostranskimi ukrepi izogniti sprejetim dogovorom in kršiti mednarodne obveznosti države. Medsebojno zaupanje je bilo podrto in k njegovi krepitvi ni posebej prispevala niti hitro popravljena nepredvidnost Evropske komisije pri komunikaciji o distribuciji cepiv ob začetku cepljenja zoper covid-19. Brexit je posebej prizadel državljane držav članic EU, ki so takrat živeli v državi. Ena od pomembnejših nalog veleposla-

nika Valeja de Almeide je bila tudi skrb za teh šest milijonov ljudi.

Avtor v knjigi ne ponuja niti brutalne odkritosti niti aristokratske vzvišenosti, ko predstavlja, kako se lahko svet in EU (njegov delodajalec) upreta in obrneta trend globalne ločitve. Namesto tega kot zaveden državljani EU, ki verjame v pomen in trdnost evropskega projekta ter se noče vdati obupu, teži k iskrenosti, izpostavi potrebne korake, ki so izziv in priložnost za EU na področju politike, vladovanja, gospodarstva, zunanjih odnosov in varnosti. Pri tem izstopajo odločnost in iznajdljivost, manj samovšečnosti in več samozavesti, manj naivnosti in več realizma, manj arogance in več tolerance in pragmatizma. Izpostavljena je previdnost, da se preprečijo škodljive posledice na področju trgovine, da se pospeši tehnološki razvoj ter oblikuje skupna regulativa z zavezniki, vključno z bolj povezanim in osredotočenim sodelovanjem partnerjev. Spodbujena je odprta interakcija z razvijajočim se svetom ter izgradnja sistema, ki bo racionalen, manj ideološki, dovolj transakcijski in kooperativen, pri čemer vsak od akterjev prevzame del skupne odgovornosti. Njegov pogled na globalni svet je seveda zahodnocentrični in evroatlantski, a to je okolje, iz katerega avtor izhaja. Nostalgija je lahko zapeljiva lažnivka in zgodovina se redko – ali nikoli – ne ponovi. Nismo obsojeni na razdrobljenost in konfrontacijo. Voditi nas morata upanje in vera v človeštvo, ne pesimizem.

Simona LESKOVAR

Miša ĐURKOVIĆ (ed.)

FAŠIZAM U NAŠOJ EPOHI

Belgrade: Čigoja, 2023,

pp. 351; 21,28 EUR

(ISBN: 9788653109226)

The last two decades have seen serious challenges to the hegemony of the existing liberal democratic order. A range of crises – economic, social, environmental, along with the inability of the liberal and more mainstream conservative parties and governments to tackle them, have led to the destabilisation of different parties and political systems across the globe. Partly this has been due to the rise of more radical left parties, which have also seen a rapid decline in the last few years or adapted to the status quo, but it is primarily due to the rise of new right-wing parties, often labelled fascist. Within this framework, the edited volume entitled *Fascism in our Epoch* (*Fašizam u našoj epohi* in the Serbian language, a paraphrase of the title of the famous study of Ernst Nolte *Der Faschismus in seiner Epoche*), tackles the different historical emanations and theoretical discussions about fascism. The book is edited by Miša Đurković and collects 12 different contributions (divided into 2 parts with 6 chapters, where the first deals with theoretical reflections and the second with the different manifestations and emanations of fascism) all written, except one, by scholars from the post-Yugoslav space.

In chapter one, Roger Griffin demythologises the ‘March on Rome’ on 28 October 1922, namely, a crucial myth of the fascist regime in Italy, since it never happened. He stresses the im-

portance of the March in the sense that it was neither a coup nor a true putsch, and more a specific exchange between the king and Mussolini. The fascists entered Rome only on 31 October, after Mussolini had already been appointed prime minister.

In chapter two, Todor Kuljić describes how in the early 1960s the focus of German historiography and anti-fascism remained based on the connection between fascism and capitalism. However, ever since the 1970s the leftist anti-fascism, which was also anti-capitalist, has gradually been replaced by the rise of anti-totalitarianism, especially given the conversion of the French generation of 1968. The highest point of revisionism was reached in the works of Ernst Nolte and his thesis that fascism was the answer to Bolshevism, making Bolshevism the true and original evil. Following the famous *Historikerstreit* in the 1980s, Habermas argued that Auschwitz cannot be compared to the Gulag, which temporarily prevailed. Still, after the defeat of socialism in the Cold War, the discourse changed and anti-fascism was transformed into a hegemonic anti-totalitarian discourse. Anti-fascism has become devoid of anti-capitalism and subdued to anti-totalitarianism.

Jovo Bakić investigates in chapter three the relationship between fascism and other related concepts like the extreme right, the far right and the radical right. He claims that fascism was a specific answer to the crisis of capitalism and liberal hegemony after the First World War. The fascist regime quickly turned into a bourgeois and capitalist regime based on nationalism, racism

and oppression. He argues that fascism is a particular type of extreme-right politics. Extreme-right politics is a subtype of far-right, reactionary, authoritarian and xenophobic nationalism, whereas not every extreme right is already fascist, while claiming that the radical right is the right-wing politics seen in many European countries under the guise of defending the democracy narrative, yet is often nationalist, even xenophobic. Crucially, Bakić claims that the radical right can serve as a bridge between the extreme right and the conservative right.

In chapter four, Tihomir Cipek explores three different analyses of fascism: Marxist-Communist, conservative, and liberal interpretations, and points out their strengths and weaknesses. The communist interpretations were based on the class nature of fascism, viewing it as a new and specific type of bourgeois rule. The conservative insights are important because they stress the religious aspect and symbols in fascism, albeit fascism has never replaced other organised religions. The liberal position stresses the totalitarian nature of fascism while pointing out that the problem of this theory is that it takes liberal democracy as the only normal way of rule, while projecting totalitarian tendencies way back to ancient times. This position also equates communism with fascism and disregards the important differences between them, and views fascism as a consequence of Bolshevism. The greatest merit of the chapter is that Cipek also considers their political embeddedness and motives, showing how and why the liberal totalitarian narrative has pre-

vailed and is used today to ensure the reproduction of the status quo.

In chapter five, Rastko Lompar looks at the case of Yugoslav interwar right politics in the framework of the 'new consensus' in the studies on fascism; i.e., the idea of the existence of generic fascism and the idea of a fascist minimum. Lompar continues by analysing different political movements, youth organisations and parties, before classifying them according to the theories presented in the first part, which provides a very interesting overview not just for specialists but also those who only occasionally glance at the history books describing Yugoslav political life between the world wars.

Miša Đurković considers the concept of the fascist minimum in chapter six. He initially sketches the attempts to construct the theory of the fascist minimum, as already made by Nolte and later Sternhell, Griffin, Payne and Eatwell. His core question is whether the concept of fascism can be applied to explain movements and regimes after 1945. He then presents Umberto Eco's theory of Ur-Fascism and contends that this could be a much more fruitful way of thinking about fascism and applying it to the analysis of particular manifestations of fascist politics.

In chapter seven, Dušan Dostanić delves into a very interesting theory of fascism. He explores the works of Armin Mohler, a crucial figure among the German new right, and focuses on his conceptualisation of fascism as a style, while criticising Nazism and the Führer for having very little to do with fascism. The critical idea of Mohler's conception

of fascism as a style is that it is based on certain reactions to the world that vary between liberals and leftists. It is based chiefly on declining universalism, abstractions, joy in struggles, and primarily symbolic violence.

Saša Gajić writes in chapter eight about traditionalism/perennialism and fascism. In the first part, Gajić explores in which ways traditionalism and fascism are similar, arguing that many more differences exist than commonalities. He then moves on to consider the impact of various important theoretician traditionalists (Evola, Eliade) with different fascists and the far right before, during and after the Second World War. The author concludes the chapter by arguing that the close connection between perennialism and fascism has in fact been weak.

In chapter nine, Aleksa Filipović provides a concise and interesting overview of the Soviet and Russian scholarly analysis of fascism. Three topics are in focus: analysis of the rise of fascism and its evolution during the time of the Soviet Union; analysis of contemporary fascism in the post-Soviet region; and analysis of fascism in Russia. He introduces several authors largely unknown to a Western audience, ones who have explored fascism and Nazism, and thus his contribution is very important for understanding the historical and contemporary analysis and contribution of the (post)-Soviet space in debates on fascism.

In chapter ten, Stevan Gajić presents a very interesting analysis of various radical and extreme right-wing movements in post-Soviet spaces. He looks at different phenomena like National

Bolshevism, neo-Nazism, and other extremes on the right, while also considering the war in Ukraine in the context of identity confusion and changes in the post-Soviet and especially Russian world. He also elaborates on the complex situation in Ukraine and the emergence of Nazism there, while also describing the particular anti-Russian nationalism in Ukraine and the anti-Russian identity politics in Belarus.

Rajko Petrović takes a closer look at the relationship and position of fascism in the Hispanic world in chapter eleven. First, he analyses the emergence and development of fascism in Spain. Petrović claims that important differences exist between Francoism and fascism/Nazism, arguing the former should not be classified as a fascist regime. A short overview of different fascist movements in Latin America is then presented, where it is claimed that Peronism, Pinochetism, Stroessnerism and Vargasism were not truly fascist; even though they were militant and extreme-right political movements and regimes, they were neither antisemitic nor corporatist.

The last chapter written by Srbojub Peović asks whether it is justifiable to use the concept of fascism to explain different movements in the Muslim world during the 20th century. He applies the definition of the fascist minimum developed by Griffin to various movements. He initially analyses the concept of Islamic fascism/Islamofascism, before analysing the Muslim Brotherhood, and exploring movements and regimes in Syria, Iraq, Iran and Türkiye.

While the overall book has a co-

herent and logical structure, it must be stressed that the theoretical part appears to be stronger (especially the chapters by Kuljić and Cipek stand out to the author of this book review for their theoretical depth and political reflections). The empirical chapters consider different geographical cases and emanations of right-wing politics and fascism. Still, on occasion, these empirical investigations tend to be either somewhat too narrow (albeit their great strength is that they are always comparative) or include cases that seem

to have little to do with fascism. Notwithstanding these remarks, overall, the volume provides an excellent guide and overview of the main topics surrounding fascism. This means that is a very important contribution to the research of fascism not simply in the Serbian context, but also for the entire post-Yugoslav space given that it brings synthetic – theoretical and empirical – insights into a topic that is often overlooked.

Marko HOČEVAR

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Primeri navajanj:

Knjige

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

Zborniki

Featherstone, Mike, ur., in Mike Hepworth, ur. 1991. *The Body: Social Process and Cultural Theory*. London: SAGE Publications.

Poglavje v zborniku

Palan, Ronen. 1999. »Global Governance and Social Closure or Who is to Governed in an Era of Global Governance?« V *Approaches to Global Governance Theory*, urednika Martin Hewson in Timothy J. Sinclair, 55–72. Albany: State University New York Press.

Članek v znanstveni reviji

Bachrach, Peter, in Morton S. Baratz. 1963. »Decisions and Nondecisions: An Analytical Framework«. *American Political Science Review* 57 (3): 632–42. <https://doi.org/xxx>.

Časopisni članek

Mihajlović, Novica. 2024. »Z Daytonom rešeni mir, v Dayton ujeti razkol«. *Delo*, 1. marec 2024. <https://www.delo.si/novice/svet/z-daytonom-reseni-mir-v-dayton-ujeti-razkol/>

Spletna stran

Fakulteta za družbene vede. 2024. »Fakulteta za družbene vede omogoča športnikom prijazno izobraževanje«. Objavljeno 16. februarja 2024. <https://www.fdv.uni-lj.si/obvestila-in-informacije/novice-in-obvestila/fakulteta-za-druzbene-vede-omogoca-sportnikom-prijazno-izobrazevanje>

Družbeni mediji

Souza, Pete (@petesouza). 2016. »President Obama bids farewell to President Xi of China at the conclusion of the Nuclear Security Summit«. Instagram, 1. aprila 2016. <https://www.instagram.com/p/BDrmfXTtNCt/>

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Examples of References:

Books

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

Edited Books

Featherstone, Mike, ed., and Mike Hepworth, ed. 1991. *The Body: Social Process and Cultural Theory*. London: SAGE Publications.

A chapter in a monograph

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

An Article in a Scientific Journal

Bachrach, Peter, and Morton S. Baratz. 1963. “Decisions and Nondecisions: An Analytical Framework”. *American Political Science Review* 57 (3): 632–42. <https://doi.org/xxx>.

A Newspaper Article

Freeman, Jeremy. 2024. “The Best Way to Find Out if We Can Cool the Planet.” *New York Times*, 17 March 2024. <https://www.nytimes.com/2024/03/17/opinion/solar-geoengineering-risks-research.html>.

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Souza, Pete (@petesouza). 2016. "President Obama bids farewell to President Xi of China at the conclusion of the Nuclear Security Summit". Instagram, 1 April 2016. <https://www.instagram.com/p/BDrmfXTtNCt/>.

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