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THE RUSSIAN FEDERATION-UKRAINE WAR AS A PROXY CONFLICT: SECURITY, DIPLOMACY, AND HYBRID THREATS IN EASTERN AND SOUTHEASTERN EUROPE

Minas LYRISTIS[1]
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Abstract

The ongoing Russian Federation-Ukraine war has produced consequences far beyond Ukraine's battlefield, reshaping the security, diplomatic and informational environment of Eastern and Southeastern Europe. This article analyses the conflict through a qualified proxy-war framework, treating the war not as a simple Russia–West confrontation that denies Ukrainian agency, but as a conflict in which Ukraine's existential defence is embedded in indirect great-power competition through military assistance, sanctions, alliance signalling and strategic narratives.

The article argues that the proxy-war dynamic produces differentiated regional outcomes through three mechanisms: securitisation, politicisation and narrative transmission. In frontline NATO and EU states, the war reinforces threat perception, defence adaptation and demand for allied reassurance. In states marked by energy dependence, domestic polarization or historical-cultural ties to Russia, the same framing can legitimize hedging, selective alignment or neutrality claims. In exposed partner states and vulnerable media environments, it increases susceptibility to hybrid pressure by turning external strategic narratives into domestic political cleavages.

By comparing frontline allies, intra-alliance dissenters, Western Balkan balancers, Black Sea states and exposed partner states, the article shows how the proxy-war lens connects security dilemmas, diplomatic positioning and information warfare within a single regional framework. The findings suggest that the Black Sea–Balkan–Eastern Mediterranean corridor will remain characterized by uneven deterrence, selective cooperation and persistent hybrid contestation.

Keywords: proxy war; Russia–Ukraine war; hybrid warfare; disinformation; security

Introduction

Russia's full-scale invasion of Ukraine has devastated the country and has fundamentally altered the geopolitical landscape of Eastern and Southeastern Europe by generating new security dilemmas. Its effects are not confined to the battlefield: the war has become embedded in renewed great-power antagonism over the European security order, compelling regional states to reassess defence planning, alliance commitments, and societal resilience. In order to understand the situation, it is essential to engage with the concept of "proxy war". In International Relations literature, a proxy war is broadly understood as a conflict where external actors indirectly participate by supporting one or more of the conflict

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parties to achieve their own strategic objectives, typically without committing their own forces to direct combat[1].

Andrew Mumford, in "A Concise Oxford Dictionary of Politics and International Relations", defines proxy wars as "conflicts in which a third party intervenes indirectly in a pre-existing war in order to influence the strategic outcome in favour of its preferred faction". This highlights indirect intervention and strategic influence by a benefactor providing weapons, training, and funding, often when direct involvement is too risky or costly. Encyclopaedia Britannica describes it as a conflict where third parties support combatants to advance their interests or undermine opponents, largely without direct fighting, enabling major powers to avoid direct confrontation. This was salient during the Cold War due to nuclear risks. Moreover, Tyrone L. Groh offers a focused definition: "directing the use of force by a politically motivated, local actor to indirectly influence political affairs in the target state". Groh emphasizes that proxy war is a "middle ground for intervention," distinct from mere assistance, involving a hierarchical principal-agent relationship where the intervener manages uncertainty, though it's rarely low-cost or risk-free. At the same time, the Routledge Handbook of Proxy Wars attests to the concept's growing significance. However, applying the "proxy war" label is complex. Stephen Webber argues the term can be "unhelpful" for the Ukraine war, as it "deprives the parties involved of their agency, and it oversimplifies the often-complex relationships among all sides". This critique highlights Ukraine's existential struggle as the primary driver of its defence, not solely as a pawn. Thus, labelling the conflict a "proxy war" is a geopolitical act with performative consequences. This framing, used by officials like Russian President Vladimir Putin and analysts, shapes threat perception, resource allocation, and justifications. Thus the "proxy war" term becomes a meta-narrative conditioning response. For Eastern and Southeastern European nations, it can amplify historical anxieties, influencing domestic politics and foreign policy.[2] The debate on the "proxy war" framework for Ukraine highlights a tension between systemic, great power dynamics (structure) and the motivations of smaller states like Ukraine (agency). While proxy war theories often emphasize principals over agents, potentially downplaying local autonomy, Ukraine's fight for national survival is a primary driver. Yet, substantial Western support and Russia's framing of the conflict as a confrontation with NATO lend weight to the proxy war interpretation.

This article employs a qualified proxy-war framework to examine how the Russia, Ukraine war reshapes the security environment of Eastern and Southeastern Europe, understood here as NATO and the EU's eastern flank, the Western Balkans, and the Black Sea littoral, with spillovers toward the Black Sea–Eastern Mediterranean corridor. The paper does not use the proxy-war concept as a totalizing label that denies Ukrainian agency. Rather, it treats the proxy-war dynamic as a partial but analytically useful configuration: a war in which Ukraine's existential defence is simultaneously embedded in indirect Russia–West

[1] Andrew Mumford, *Proxy War*, "A Concise Oxford Dictionary of Politics and International Relations", Oxford University Press, Oxford, 2018; Baugh, L. S., *Proxy War*, Encyclopaedia Britannica, May 2, 2025, https://www.britannica.com/topic/proxy-war; Groh, Tyrone L., *Proxy War: The Least Bad Option*, Stanford University Press, Stanford, 2019, p. 29, https://doi.org/10.11126/stanford/9781503608184.001.0001

[2] Stephen Webber, *No, Ukraine Is Not Fighting a 'Proxy War'*, in *The Dispatch*, April 24, 2025, https://thedispatch.com/article/proxy-war-ukraine-russia-definition/; Hosaka, Sanshiro, *Ukraine's Agency in Japanese Discourse*, "Journal of Regional Security", Vol. 18, No. 1, 2023, pp. 47–58, https://doi.org/10.5937/jrs18-41778; Muradov, Ibrahim, *Disrupting the Narrative*, in "Europe-Asia Studies", Vol. 77, No. 3, 2025, pp. 341–364, https://doi.org/10.1080/09668136.2025.2465569

competition through military assistance, sanctions, intelligence cooperation, alliance signalling and strategic narratives.

The added value of this framework lies in its ability to connect dimensions that are often analysed separately. A purely alliance-politics approach explains deterrence and NATO adaptation, while regional-security approaches illuminate geographical proximity and patterns of interdependence. The proxy-war lens, however, captures how external support, great-power rivalry and narrative contestation interact inside regional political arenas. It explains not only why states perceive the war differently, but also how the framing of the war as a Russia–West confrontation becomes a causal factor in regional politics. Where threat perception and alliance dependence dominate, the frame strengthens balancing; where energy dependence, domestic polarization or unresolved status issues are salient, it enables hedging and neutrality claims; and where media ecosystems are vulnerable, it becomes a vector of hybrid influence. The article therefore argues that the proxy-war dynamic produces differentiated regional outcomes through three mechanisms: securitisation, politicisation and narrative transmission.

Purpose and Objectives

The purpose of this study is to assess how the proxy-war dynamic effects regional security in Eastern and Southeastern Europe. Specifically, it (i) maps variation in threat perception and defence responses, (ii) explains differences in diplomatic alignment, hedging and balancing strategies, and (iii) analyses the information environment as a domain of hybrid contestation that can amplify or constrain policy choices.

Methodology

The article adopts a qualitative research design combining comparative case analysis and limited process tracing. It triangulates primary sources (official statements, national security and defence documents, NATO and EU strategic texts) with secondary academic literature on proxy wars, alliance politics and hybrid warfare, complemented by open-source reporting on disinformation campaigns and cyber incidents. Cases are selected purposively to capture variation in alliance status and exposure to Russian power: frontline allies (Poland and the Baltic states), intra-alliance dissenters (Hungary), Western Balkan balancers (Serbia), Black Sea states (Romania and Bulgaria) and an exposed partner state (Moldova), with brief attention to spillovers in the Eastern Mediterranean (Greece and Türkiye).

The design does not seek universal causal generalization; rather, it compares how alliance status, geographical exposure, energy dependence and domestic political constraints shape differentiated regional responses to the war.[1] To make the comparison more structured, the article uses four cross-case indicators. Threat perception is assessed through official statements, strategic documents, defence-spending decisions and requests for allied presence. Diplomatic alignment is evaluated through positions on sanctions, military assistance, EU/NATO coordination and public justifications of national policy. Hybrid vulnerability is examined through reported disinformation, cyber or political-influence operations and the domestic channels through which such narratives gain resonance. Energy dependence and domestic polarization are treated as conditioning variables that mediate the effect of the

[1] Assaf Moghadam; Rauta Vladimir; Wyss Michel, (Eds)., *Routledge Handbook of Proxy Wars*, Routledge, Abingdon, 2023, https://doi.org/10.4324/9781003174066; Watts, Stephen; Frederick, Bryan A.; Chandler, Nathan; Toukan, Mark; Curriden, Christian; Mueller, Erik E.; Geist, Edward et al., *Proxy Warfare in Strategic Competition: State Motivations and Future Trends*, RAND Corporation, 2023, https://www.rand.org/content/dam/rand/pubs/research_reports/RRA300/RRA307-2/RAND_RRA307-2.pdf.

proxy-war frame. Process tracing is used in a limited sense: the analysis follows how the interpretation of the war as an indirect Russia–West confrontation is translated into national policy choices through intermediate mechanisms such as threat perception, elite framing and public-opinion constraint, rather than claiming deterministic causality[1].

Defining the Proxy-War Element

Characterizing the Ukraine conflict as a proxy war requires delineating principal external actors' objectives, Russia, and the collective West (primarily US/NATO), and evidence of their indirect involvement. Russia's objectives include reasserting influence and reshaping European security. A key goal is preventing NATO expansion eastward. Putin cited NATO's eastward march and military infrastructure encroachment as a threat. This relates to Russia's desire for a buffer zone, preventing Ukraine from becoming a Western military outpost. Russia also stated goals of "demilitarisation and denazification" of Ukraine and protecting Russian-speaking populations, claims widely seen as pre-textual in the West. More broadly, Moscow seeks to challenge the US-dominated post-Cold War security architecture and re-establish Russia as a great power.[2] Western/US/NATO objectives centre on defending Ukrainian sovereignty and international law. Supporting Ukraine's sovereignty and territorial integrity is foremost. Deterring further Russian aggression and strengthening alliance cohesion within NATO/EU are related goals. Upholding the "rules-based international order" is another aim. An implicit objective of sustained Western support is weakening Russia's war-making capacity[3].

The evidence of these proxy elements is abundant and manifests across multiple domains:

First, massive and sustained military aid has flowed to Ukraine from the United States, various NATO allies, and EU member states. This support has encompassed a wide array of weaponry, from small arms and anti-tank missiles in the initial phases to more sophisticated systems like artillery, armoured vehicles, air defence systems, and commitments for advanced fighter jets, alongside extensive training programs and intelligence sharing. While the accounting and true economic value of this aid are subject to debate, its impact on Ukraine's ability to resist Russian forces is undeniable. The US, for example, has provided billions in military assistance since February 2022, utilizing Presidential Drawdown Authority to send equipment from DoD stockpiles. European nations, collectively, have also contributed substantial aid[4].

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[1]Alexander L. George; Bennett Andrew, *Case Studies and Theory Development in the Social Sciences*, MIT Press, Cambridge, 2005, pp. 67–72, pp. 206–207, pp. 210–212

[2] Al Jazeera, *No Other Option: Excerpts of Putin's Speech Declaring War*, February 24, 2022, https://www.aljazeera.com/news/2022/2/24/putins-speech-declaring-war-on-ukraine-translated-excerpts (21.03.2026); Mankoff, Jeffrey, *Russia's War in Ukraine: Identity, History, and Conflict*, Centre for Strategic and International Studies, April 22, 2022, https://www.csis.org/analysis/russias-war-ukraine-identity-history-and-conflict; Mendiguren, Lorea, *What Does Putin Want?,* Harvard Negotiation & Mediation Clinical Program, August 8, 2022, https://hnmcp.law.harvard.edu/hnmcp/blog/what-does-putin-want-assessing-interests-in-the-invasion-of-ukraine/ (21.03.2026)

[3] U.S. Department of State, *U.S. Security Cooperation with Ukraine*, Bureau of Political-Military Affairs, March 12, 2025, https://www.state.gov/bureau-of-political-military-affairs/releases/2025/01/u-s-security-cooperation-with-ukraine; Kristin Archick, *Russia's War Against Ukraine: European Union: Responses and U.S.-EU Relations*, Congressional Research Service, CRS Product IN11897, November 1, 2024, https://www.congress.gov/crs_external_products/IN/PDF/IN11897/IN11897.24.pdf. (21.03.2026)

[4] Edgington, Tom; Eardley, Nick, *How Much Has the US Given to Ukraine?,* BBC News, December 8, 2025, https://www.bbc.com/news/articles/crew8y7pwd5o; Fedyk, Anastassia; Hodson, James, *New Analysis from Economists for Ukraine: The Cost of US Aid to Ukraine Is Less than Half the Official Figures*, CEPR, March 6,

Second, the West has imposed unprecedented economic sanctions on Russia. These measures have targeted Russia's central bank, major financial institutions, key individuals among the elite, the energy sector (including attempts to cap oil prices), and access to Western technology, all with the aim of degrading Russia's war economy and its ability to finance the conflict. While these sanctions have not caused a complete collapse of the Russian economy, partly due to Russia's ability to redirect trade to non-sanctioning countries like China and India, they have imposed significant costs, restricted access to critical components, and demonstrably weakened Russia's war-making potential[1].

Third, information warfare has been a critical dimension of the conflict, with both Russia and the West (and Ukraine itself) engaging in extensive operations. Russia has deployed narratives portraying the war as a necessary defence against NATO aggression and Western encirclement, aiming to justify its actions domestically and internationally, and to undermine Western support for Ukraine. The West, in turn, has sought to counter these narratives, expose Russian disinformation, and bolster Ukraine's strategic communications efforts.

The Western proxy element has evolved. Initial Western objectives of defending Ukraine and deterring escalation appear to have expanded. Sustained support has taken on an attritional character against Russia's capabilities. The discourse about degrading Russia's future threat capacity has become more prominent. This evolution can create a feedback loop: Russia perceiving Western aims as more offensive may double down on its narrative of fighting NATO, entrenching the conflict's proxy nature and complicating de-escalation.

Three mechanisms link the proxy-war dynamic to regional divergence. First, securitisation: when the war is interpreted as an indirect Russia-NATO confrontation, frontline states read the conflict as a test of deterrence credibility, resulting in higher defence investment, military modernization and stronger demand for NATO reassurance.[2] Second, politicisation: in states with stronger energy dependence, more polarized domestic politics or historical-cultural ties to Russia, the same frame can be used by governing elites or opposition actors to justify caution, restraint or claims of neutrality[3]. Third, narrative transmission: Russian and local proxy narratives convert the geopolitical frame into domestic political pressure by portraying military aid to Ukraine or sanctions against Russia as participation in someone else's war. These mechanisms explain why the proxy-war lens does more than describe external involvement; it helps account for why similar external pressures generate different regional responses.

Regional Context: Eastern and Southeastern Europe

This section contextualizes the proxy-war framing within Eastern and Southeastern Europe by examining (i) the region's historical memories of Soviet domination and Cold War frontiers, (ii) the differentiated strategic positions of regional states as frontline NATO

2025, https://cepr.org/voxeu/columns/new-analysis-economists-ukraine-cost-us-aid-ukraine-less-half-official-figures (21.03.2026)

[1]Gabriel, Felbermayr; Kariem, Heider; Kirilakha, Aleksandra; Kwon, Ohyun; Syropoulos, Constantinos; Yalcin, Erdal; Yotov, Yoto, *On the Effectiveness of the Sanctions on Russia: New Data and New Evidence*, CEPR, March 12, 2025, https://cepr.org/voxeu/columns/effectiveness-sanctions-russia-new-data-and-new-evidence; Kumleben, Nick; Luck, Philip; Palazzi, Andrea Leonard, *Back & Forth 3: Do Sanctions Work?,* CSIS, March 19, 2025, https://www.csis.org/analysis/back-forth-3-do-sanctions-work (21.03.2026)

[2] NATO, *Strengthening NATO's Eastern Flank*, October 23, 2025, https://www.nato.int/cps/en/natohq/topics_136388.htm (21.03.2026)

[3] Markus Balázs Göransson, *The Hungarian Government's Rhetoric on Russia's Large-Scale Invasion of Ukraine*, "European Security", 2025, https://doi.org/10.1080/09662839.2025.2468943 (21.03.2026)

members, intra-alliance dissenters, Western Balkan balancers or exposed partners, and (iii) how these legacies shape contemporary threat perception and policy responses to the Russia–Ukraine war.

Historical resonance. The current geopolitical anxieties and strategic calculations of Eastern and Southeastern European states are strongly shaped by Cold War legacies and memories of Soviet domination. The region's experience as a contested frontier between Soviet and Western spheres of influence continues to filter contemporary interpretations of Russia's war against Ukraine. For Poland and the Baltic states, Russian aggression evokes fears of revanchism and renewed imperial pressure, while in Moldova it reinforces concerns about sovereignty and vulnerability. NATO enlargement is therefore interpreted differently across the region: Moscow frames it as encirclement, whereas many Eastern European states regard it as a sovereign security choice made in response to historical experience[1]. These memories help explain why some regional governments strongly support Ukraine and advocate robust deterrence, while others remain more cautious or ambivalent.

Differing regional perspectives. There is no monolithic regional perspective on the Ukraine conflict. National interests, historical relationships, energy dependence, domestic politics, and public opinion create diverse responses. Poland and the Baltic States (Estonia, Latvia, and Lithuania) show strong NATO/US alignment, viewing Russia's actions as an existential threat. Their policies include robust aid to Ukraine, advocating for strong sanctions, increased defence spending, and welcoming NATO presence. This hawkish stance is shaped by historical experiences of Soviet occupation.[2] Hungary, under Viktor Orbán, pursues a cautious, transactional approach prioritizing national interests like energy security. It maintains ties with Moscow, voices scepticism on sanctions, and is reluctant to provide military aid to Ukraine, framing its policy as "pro-peace". This often puts Hungary at odds with EU/NATO partners.[3] Serbia balances deep ties with Russia (historical, cultural, energy, Kosovo support) and its EU aspiration. It has condemned Russia's invasion in UN forums but not joined sanctions, a policy of "strategic ambiguity".[4] Other Balkan countries (e.g., Romania, Bulgaria) generally align with EU/NATO positions, but with nuances due to internal complexities, historical legacies, energy vulnerabilities, and susceptibility to Russian influence. Romania has increased defence spending and is a key aid conduit. Bulgaria has provided aid despite internal divisions. Western Balkan EU aspirants face particular

[1] EBSCO Information Services, *Warsaw Pact*, Research Starters, https://www.ebsco.com/research-starters/history/warsaw-pact (12.02.2026); Kramer, Mark, *The Myth of a No-NATO-Enlargement Pledge to Russia*, "The Washington Quarterly", Vol. 32, No. 2, 2009, pp. 39–61, https://doi.org/10.1080/01636600902773248

[2] Kateryna Kvasha, *Security, Europe! Poland's Rise as NATO's Defense Spending Leader*, Wilson Centre, March 6, 2025, https://www.wilsoncenter.org/article/security-europe-polands-rise-natos-defense-spending-leader; Kasekamp, Andres, *NATO's Greatest Test: Baltic Security in Trump's Shadow*, "Georgetown Journal of International Affairs", May 21, 2025, https://gjia.georgetown.edu/global-governance/trump-and-nato/(12.02.2026)

[3] Göransson, Markus Balázs, *The Hungarian Government's Rhetoric on Russia's Large-Scale Invasion of Ukraine*, "European Security", 2025, https://doi.org/10.1080/09662839.2025.2468943; Robert Lansing Institute, *Viktor Orbán's Russian Alignment*, May 20, 2025, https://lansinginstitute.org/2025/05/20/viktor-orbans-russian-alignment-a-threat-from-within-the-european-union/ (12.02.2026)

[4] Florian Bieber, *Serbia's Staged Balancing Act*, in "Georgetown Journal of International Affairs", August 7, 2023, https://gjia.georgetown.edu/2023/08/07/serbias-staged-balancing-act/; Curdy, Angélique, *Serbia and Its Partners: A Balancing Act*, Blue Europe, March 19, 2025, https://www.blue-europe.eu/analysis-en/short-analysis/serbia-and-its-partners-a-balancing-act/(12.02.2026)

pressures.[1] These perspectives are amplified by the weaponization of historical narratives. Russia exploits historical grievances and cultural affinities to sow division. Narratives of Slavic brotherhood resonate in Serbia, while memories of Soviet oppression fuel threat perceptions in Poland and the Baltics. Hungary might evoke Cold War dangers to small nations to justify its caution. This manipulation is a key hybrid warfare tactic. Varying energy dependence on Russia also constrains foreign policy autonomy, impacting full alignment with Western objectives. Hungary's emphasis on energy security is a prime example. Serbia's gas reliance also plays a role. While the EU has reduced overall Russian energy dependence, the transition is uneven and challenging for some, providing Russia leverage. This underpins divergent diplomatic strategies.

Heightened security dilemmas. The Ukraine conflict as a Russia-West proxy war has intensified security dilemmas in Eastern and Southeastern Europe. This means increased threat perceptions, impacting defence postures, alliance commitments, and heightening vulnerability to hybrid warfare. The classic security dilemma is supercharged in this context. Eastern and Southeastern Europe face an intensified security dilemma as the Russia–Ukraine war reshapes perceptions of threat and credibility. In this dynamic, defensive measures undertaken by one actor are interpreted as offensive preparations by another, generating action–reaction cycles that can accelerate militarisation and narrow diplomatic space. Since 2022, Russia's use of military force, coercive signalling, and hybrid tools has increased perceived vulnerability across the region, prompting higher defence outlays, force posture adjustments, and stronger reliance on NATO's deterrence and defence commitments. Persistent cyber operations and disinformation further exacerbate uncertainty, complicating intent attribution and increasing the risk of miscalculation.

Increased threat perception. Framing the conflict as a Russia-NATO proxy contest magnifies fears of escalation and spillover. Regional actors perceive a potential flashpoint for wider confrontation. This framing exacerbates the adversarial dynamic, driving insecurity. Academic analyses highlight how defensive measures can be seen as offensive, fuelling escalating tensions, amplified by the proxy dimension. Regional assessments consistently note mutual perceptions of threat between Russia and NATO. Across the alliance, Russia is now treated as the principal military challenge on the eastern flank, reflecting the sharpened threat perception produced by the war and its wider coercive spillovers.[2] Many Eastern/Southeastern European capitals fear that Russian success in Ukraine could embolden further pressure on neighbours, including Moldova or NATO members. The risk of "catastrophic spillover" is a constant concern. For example, Poland experienced spillover risk in November 2022 when a missile killed two citizens, illustrating tangible dangers. Polish strategic documents identify Russia as the primary threat, necessitating military modernization and robust NATO posture. The Baltic States, drawing on historical experiences, consistently condemn Russian aggression and call for support for Ukraine and

[1] Ljiljana Kolarski, *The Impact of the War in Ukraine on the Western Balkans*, "The Policy of National Security/Politika Nacionalne Bezbednosti", Vol. 23, No. 2, 2022, pp. 87–107, https://doi.org/10.22182/pnb.2322022.5; Mukhina, Olena, *Romania Boosts Defense Spending*, Euromaidan Press, March 29, 2025, https://euromaidanpress.com/2025/03/29/romania-boosts-defense-spending-maintains-ukraines-aid-after-security-council-meeting/; Trifonova, Gloria; Malinov, Svetoslav, *Operation 'Disinformation' in Bulgaria*, Centre for the Study of Democracy, November 29, 2024, https://csd.eu/publications/publication/operation-disinformation/ (12.02.2026)

[2] NATO, *Strengthening NATO's Eastern Flank*, October 23, 2025, https://www.nato.int/cps/en/natohq/topics_136388.htm; Jones, Seth G.; Daniels, Seamus P., *Deterring Russia: U.S. Military Posture in Europe*, CSIS, January 27, 2025, https://www.csis.org/analysis/deterring-russia-us-military-posture-europe (12.02.2026)

Russian accountability. Romania passed a law in early 2025 authorizing its military to neutralize unauthorized drones after Russian drone debris was found on its soil.

Impact on defence alliances. Intensified threat perception has catalysed profound changes in regional defence postures and NATO's strategic orientation. A surge in defence spending is primary. Poland aims to spend 4.2% of GDP in 2024, up to 4.7% in 2025, for ambitious military modernization with US and South Korean hardware[1]. Germany's Zeitenwende includes a €100 billion defence fund and commitment to exceed NATO's 2% GDP target. European military expenditure surged 17% to $693 billion in 2024, the steepest rise since the Cold War's end; Russia's reached $149 billion. A record 22 of 32 NATO states met or exceeded the 2% GDP guideline in 2024, with discussions to raise it further. The proxy war has reinvigorated NATO, fostering collective purpose and bolstering its eastern flank. NATO doubled its multinational battlegroups from four to eight, extending its reinforced presence from the Baltic to the Black Sea, and increased high-readiness troops. Eastern European states strongly advocate for a robust US military presence. However, the proxy framing also introduces uncertainty about long-term US commitment, pressuring European NATO members to increase their capabilities. Maintaining cohesion can be challenged by differing national approaches, like Hungary's. A "double security dilemma" emerges for Eastern European states: their defensive measures vis-à-vis Russia are seen as threatening by Moscow, while they may feel compelled to adopt more hawkish postures to ensure continued Western allied commitment, further intensifying the primary dilemma with Russia.

Vulnerability to hybrid warfare. The conflict's proxy-war dimension increases regional vulnerability to hybrid tactics because Russia–West competition often unfolds below the threshold of direct military confrontation. Russia's hybrid toolbox includes cyber operations, electronic warfare, economic coercion, political interference, sabotage and support for destabilizing actors. Cyberattacks on critical infrastructure, GPS jamming, attacks on communications networks and threats to undersea infrastructure illustrate how the war's effects extend beyond Ukraine's territory. [2] Disinformation is equally central: narratives portraying Ukraine as a "Nazi state," the war as provoked by NATO, and European countries as instruments of Washington seek to undermine support for Kyiv and erode trust in Western institutions. Defensive measures by NATO and Eastern European states can paradoxically be incorporated into these narratives as supposed proof of Western escalation. Hybrid warfare therefore transforms the proxy-war frame into a continuous challenge to societal cohesion, infrastructure resilience and political trust[3].

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[1] Kateryna Kvasha, *Security, Europe! Poland's Rise as NATO's Defense Spending Leader*, Wilson Centre, March 6, 2025, https://www.wilsoncenter.org/article/security-europe-polands-rise-natos-defense-spending-leader; SIPRI, *Unprecedented Rise in Global Military Expenditure as European and Middle East Spending Surges*, April 28, 2025, https://www.sipri.org/media/press-release/2025/unprecedented-rise-global-military-expenditure-european-and-middle-east-spending-surges (12.02.2026)

[2] Lennart Maschmeyer, *Cyber Conflict and Subversion in the Russia-Ukraine War*, Lawfare, June 11, 2024, https://www.lawfaremedia.org/article/cyber-conflict-in-the-russia-ukraine-war; Bendiek, Annegret; Bund, Jakob; Mika Kerttunen, *The Attribution Dividend: Protecting Critical Infrastructure from Cyber Attacks*, SWP Comment 2024/C 46, October 9, 2024, https://doi.org/10.18449/2024C46; SCEEUS, *Russia's Hybrid War Against Moldova*, 2024, https://www.ui.se/globalassets/ui.se-eng/publications/sceeus/2024-publications/russias-hybrid-war-against-moldova.pdf. (12.02.2026)

[3] Kateryna Odarchenko, Davlikanova, Elena, *Russia's Evolving Information War Poses a Growing Threat to the West*, Atlantic Council, November 26, 2024, https://www.atlanticcouncil.org/blogs/ukrainealert/russias-evolving-information-war-poses-a-growing-threat-to-the-west/; Šefčíková, Kristína, *Hostile Narrative Brief: War in Ukraine*, Prague Security Studies Institute, March 2023, https://www.pssi.cz/download//docs/10391_hostile-narrative-a-case-study-of-slovakia.pdf. (12.02.2026)

Navigating great power politics. The Ukraine conflict's proxy dynamic thrusts Eastern and Southeastern European countries into complex great power politics, facing diplomatic pressures and consequential choices on allegiances. Russia's invasion is seen by many as an attack on European values and security, generating strategic anxiety and compelling reassessment of strategies. States respond to power shifts and threats via balancing (countering threats through alliances or internal build-ups) or hedging (avoiding definitive alignment, pursuing mixed strategies to maintain flexibility). Eastern and Southeastern European countries employ these strategies amidst Western pressure to align against Russia and Russian influence efforts.

Case Variation and National Strategies

The case variation becomes clear when frontline allies, intra-alliance dissenters, Western Balkan balancers, Black Sea states and exposed partner states are compared. Poland exemplifies strong alignment and robust balancing against Russia. Viewing Moscow as an immediate and severe threat, rooted in centuries of difficult history and the more recent Soviet era, Warsaw has positioned itself as a frontline state in NATO's defence and a leading European supporter of Ukraine[1]. Poland exemplifies a strategy of strong alignment and robust balancing against Russia. Viewing Moscow as an immediate and severe threat, rooted in centuries of difficult history and the more recent Soviet era, Warsaw has positioned itself as a frontline state in NATO's defence and a leading European supporter of Ukraine. Polish policy is characterized by significant military aid to Kyiv, a strong push for tougher international sanctions against Russia, a massive national military modernization program, and enthusiastic hosting of substantial NATO and US forces. For Poland, Ukraine's security is indivisible from its own and that of the broader Central and Eastern European region.

Hungary, under Prime Minister Orbán, has adopted a distinct strategy that can best be described as hedging with strong transactional elements. While formally a member of both the EU and NATO, Budapest has prioritized what it defines as its "national interests," which prominently include maintaining affordable energy supplies from Russia and avoiding direct entanglement in the conflict. Consequently, Hungary has often been a dissenting voice within the EU regarding the scope and severity of sanctions against Russia, has been reluctant to provide military aid to Ukraine, and has emphasized the need for peace negotiations, even if such negotiations might involve concessions from Kyiv. This approach is often framed domestically as a pragmatic pursuit of sovereignty and a refusal to be drawn into a great power conflict that is not Hungary's own.

Serbia continues its long-standing foreign policy of balancing between Russia and the West. This strategy is dictated by a complex web of factors: deep historical, cultural, and Orthodox Christian ties to Russia; significant dependence on Russian energy; Russia's crucial diplomatic support for Serbia's non-recognition of Kosovo's independence; and, simultaneously, Serbia's official strategic goal of EU accession, which necessitates alignment with EU policies and values, alongside substantial economic links to the West. Thus, while Serbia has condemned Russia's violation of Ukrainian territorial integrity in international forums like the UN, it has steadfastly refused to join Western sanctions against Moscow. This policy of ambivalence, according to some analyses, allows President Aleksandar Vučić to

[1] Aris Marghelis, *The Port of Alexandroupolis: A Strategic and Geopolitical Assessment*, Fondation pour la Recherche Stratégique, August 1, 2024, https://www.frstrategie.org/en/publications/notes/port-alexandroupolis-strategic-and-geopolitical-assessment-2024 (12.02.2026); Minas Lyristis, *Forging a Strategic Axis: The Deepening Partnership between Greece and Saudi Arabia*, in "HAPSC Policy Brief Series", Vol. 6, No. 1, 2025, pp. 198–203, https://doi.org/10.12681/hapscpbs.43206

maximize Serbia's international manoeuvring space and consolidate his domestic political power by appealing to diverse segments of the electorate.

Beyond the cases highlighted above, the Black Sea littoral and its immediate neighbourhood illustrate how geographical exposure and alliance status condition responses to the proxy-war dynamic. Romania has tended toward robust alignment and deterrence, treating the war as a direct security challenge to the Black Sea region and to Euro-Atlantic order. Bulgaria, by contrast, combines formal NATO/EU alignment with high levels of domestic political contestation, creating greater policy volatility and a more permissive environment for external influence operations. Moldova occupies an even more constrained position as an exposed partner state: it faces hybrid pressure and security externalities from the war while lacking the deterrent umbrella of NATO membership.

The choice between these strategies of balancing, hedging, or aligning is not solely determined by external geopolitical pressures or abstract calculations of national interest. It is significantly mediated by factors such as domestic political legitimacy and elite cohesion. Regimes with strong nationalist credentials, or those facing potent internal opposition, may strategically employ a particular foreign policy alignment to bolster their domestic standing. For instance, Hungary's "national interest" framing of its hedging strategy under Orbán is deeply interwoven with his broader "illiberal democracy" project and a nationalist rhetoric that positions Hungary as a defender of sovereignty against perceived EU overreach and "globalist" agendas, thereby resonating with certain Russian narratives and consolidating his support base. Similarly, President Vučić's carefully calibrated balancing act in Serbia enables him to navigate strong pro-Russian sentiment within parts of the populace while keeping the doors to EU accession and Western engagement at least nominally open, thus maximizing his political survivability and room for manoeuvre at home. This indicates that the "national interest" that guides these foreign policy choices is often heavily shaped by the ruling elite's primary interest in regime stability and maintaining popular support. Therefore, the pressures emanating from the Russia-West proxy war are filtered through, and frequently instrumentalized by, these domestic political dynamics, leading to alignment outcomes that are more complex and contingent than purely geopolitical models might predict.

Furthermore, the Ukraine proxy war is accelerating a fundamental re-evaluation of the concept of "strategic autonomy" within Europe, but this concept is interpreted and pursued differently across the Eastern and Southeastern European sub-regions. For some nations, particularly those like Poland and the Baltic states who feel most directly threatened by Russia, strategic autonomy is understood primarily as achieving greater European burden-sharing and capability development within the NATO framework, with the aim of strengthening the European pillar of the Alliance and ensuring continued, robust US commitment to European security (referring to EU strategic autonomy). Poland's massive military modernization and its calls for higher NATO defence spending exemplify this approach. For others, however, such as elements within Hungary or potentially Serbia, "strategic autonomy" might imply a greater desire for independent manoeuvring space between the competing great power blocs, seeking to maximize national freedom of action by avoiding rigid alignment with either side. This divergence in understanding and pursuing strategic autonomy, catalysed and amplified by the pressures of the Ukraine proxy war, could become a significant source of intra-European tension and policy incoherence in the future, potentially fragmenting European responses to ongoing and future geopolitical challenges. Taken together, these cases demonstrate that the proxy-war framing interacts with local strategic culture, alliance status and domestic politics. The next section examines the

implications for regional cooperation and the ability of existing formats, such as the Visegrád Group and Balkan initiatives, to sustain cohesion under conditions of heightened polarization.

Impact on Regional Cooperation

The proxy war dynamic emanating from the Ukraine conflict significantly impacts patterns of cooperation and division within Eastern and Southeastern Europe. It acts as both a centrifugal force, deepening rifts between states with divergent approaches to Russia and the West, and, paradoxically, a centripetal one, fostering closer collaboration among like-minded nations or on specific, shared security concerns.

The Visegrád Group (V4), comprising Poland, the Czech Republic, Slovakia, and Hungary, serves as a prominent example of this fragmentation. Historically a platform for coordinating regional policies and amplifying Central European voices within the EU, the V4 has been severely strained by the war in Ukraine. While the group showed some initial unity, such as a joint financial support package for Ukraine facilitated through the International Visegrád Fund, profound divisions quickly emerged, primarily driven by Hungary's distinct stance on sanctions against Russia and military aid to Ukraine. Poland and the Czech Republic, and to a large extent Slovakia (though with its own internal political complexities), have adopted strong positions condemning Russian aggression and providing substantial support to Kyiv. This has led to acute political tensions with Budapest, resulting in the cancellation of some high-level V4 meetings and a general weakening of the group's cohesion on foreign policy matters related to the war. The V4's response to the Ukraine crisis has been notably less unified than its collective stance during the 2015 migration crisis, indicating that the geopolitical pressures of the proxy war have overridden previous patterns of regional solidarity on certain issues. Even cooperation on energy policy within the V4, previously an area of common interest, has been complicated by differing national responses to the war and its energy implications[1].

In the Balkans, the Ukraine war and its associated proxy dynamics carry particularly complex implications, given the region's own history of conflict, unresolved disputes, and its position as an arena of competing external influences. Russia has long sought to maintain and expand its influence in the Western Balkans, often by exploiting ethnic and political fault lines, supporting nationalist narratives, and cultivating ties with anti-Western or pro-Russian political actors, particularly in Serbia and the Republika Srpska entity within Bosnia and Herzegovina. The war in Ukraine has intensified these efforts, as Moscow seeks to demonstrate its continued relevance and to distract Western attention. This can exacerbate regional tensions and potentially hinder the EU and NATO integration processes for several Balkan states. Countries like Albania, North Macedonia, and Montenegro have generally aligned more closely with EU and NATO positions on Ukraine, condemning Russian aggression and adhering to sanctions. In contrast, Serbia's balancing act and the pro-Russian stance of some political leaders in Bosnia and Herzegovina create clear divisions within the region, potentially leading to increased friction between pro-Western and more Russia-leaning states or entities.

However, the impact on regional cooperation is not uniformly negative. While the overarching proxy war dynamic can create deep divisions on high-profile political issues related to Russia, it can also paradoxically stimulate closer cooperation on specific, shared

[1] Petr Kaniok, Hloušek, Vít, *Visegrad Four as an Institution in Times of EU Crises*, "European Politics and Society", 2025, https://doi.org/10.1080/23745118.2025.2488815; Maksak, Hennadiy, *V4 in Challenging Times of War: How to Preserve Assistance to Ukraine*, GLOBSEC, February 9, 2023, https://www.globsec.org/what-we-do/publications/v4-challenging-times-war-how-preserve-assistance-ukraine. (12.02.2026)

security or logistical concerns among sub-sets of states. For example, frontline states like Poland, Romania, and Slovakia have had to coordinate closely on managing refugee flows from Ukraine and facilitating the transit of humanitarian and military aid. Even within the fractured V4, there has been some agreement on practical, less politically charged areas of cooperation, such as assistance to refugees (at least initially), medical aid for wounded Ukrainian personnel, or making efforts in de-occupied territories.

Similarly, in the Balkans, while geopolitical alignments on the Ukraine war differ significantly, shared challenges such as energy security, countering disinformation, or managing other transnational threats could, in principle, spur pragmatic cooperation even among states with divergent foreign policies towards Russia. The EU's Growth Plan for the Western Balkans, for instance, explicitly aims to foster deeper regional economic cooperation as a means of promoting stability and accelerating EU integration. This suggests that the proxy war does not entirely eradicate regional cooperation but rather reconfigures it. Broad, values-based political solidarity may falter in the face of conflicting geopolitical pressures, but more pragmatic, interest-driven cooperation on specific, tangible issues might persist or even strengthen among smaller, more agile groupings of states.

Weaponizing the Narrative

A critical dimension of proxy war is the systematic weaponization of narratives, using information and disinformation to shape perceptions and achieve strategic objectives by exploiting the "proxy war" theme. Russia employs sophisticated disinformation targeting domestic and international audiences, impacting Eastern and Southeastern Europe. The "proxy war" theme serves as a cornerstone for many disinformation campaigns, especially those emanating from or aligned with Russian state interests. A dominant and consistently promoted Russian narrative portrays the war in Ukraine not as an unprovoked act of aggression by Moscow, but as a defensive and necessary reaction to decades of US and NATO provocation, expansionism, and encirclement. Within this framing, Ukraine is depicted as a mere pawn, a "client state," or a "battering ram" being used by the West (primarily the United States) to wage a proxy war aimed at weakening, dismembering, or even destroying Russia.[1] This narrative serves multiple purposes: it attempts to legitimize Russia's actions by shifting blame to external actors, to rally domestic support by invoking a sense of existential threat, and to undermine international condemnation of the invasion. These campaigns actively seek to undermine Western unity, particularly transatlantic cohesion. European nations are often portrayed as sacrificing their own economic and security interests to serve American geopolitical ambitions, effectively acting as "vassal states" or puppets of Washington. Narratives suggesting that Europe is being economically "bled dry" or foolishly "sacrificing its economy" to sustain a US-led proxy war against Russia are common, designed to foster resentment and division within European societies and between Europe and the United States. Within Eastern and Southeastern Europe, the informational effects of the "proxy war" narrative are mediated by historical memory, political polarization and media ecosystems. In several Western Balkan and Black Sea settings, pro-Russian networks and domestic political entrepreneurs can amplify proxy-war frames to justify non-alignment, contest EU/NATO policies or delegitimize sanctions. In

[1] EUvsDisinfo, *The Myth That Won't Die: Blaming NATO for Russia's War*, 2025, https://euvsdisinfo.eu/the-myth-that-wont-die-blaming-nato-for-russias-war/; Shultz, Daniel; Jasparro, Christopher, *How Does Russia Exploit History and Cultural Heritage for Information Warfare?,* Antiquities Coalition, April 1, 2022, https://acthinktank.scholasticahq.com/article/118601-how-does-russia-exploit-history-and-cultural-heritage-for-information-warfare-recommendations-for-nato. (12.02.2026)

frontline states, similar narratives tend to be rejected more quickly, yet they can still contribute to securitized domestic politics and fatigue over time. Understanding these dynamics is essential for assessing the effectiveness of strategic communication and societal resilience policies.

Historical revisionism is another key tactic. Russia frequently weaponizes interpretations of history, particularly concerning World War II, the Soviet era, and the Cold War, to create tension, justify its current narratives, and appeal to specific historical sensitivities in different countries. This includes narratives that deny or distort Ukrainian statehood and identity, portray the Ukrainian government as "Nazi" or "fascist," and accuse Ukraine of committing "genocide" against Russian speakers, claims used to dehumanize Ukrainians and legitimize Russian military actions. The dissemination of these narratives relies heavily on a multi-platform strategy, with a strong emphasis on social media. Platforms like Telegram, X (formerly Twitter), Facebook, and YouTube are extensively used to amplify disinformation, spread manipulated images or videos (including deepfakes), and promote conspiracy theories. The strategy often involves what has been termed the "firehouse of falsehood" model, a high volume of messages across multiple channels, often contradictory, designed to overwhelm and confuse audiences rather than necessarily convince them of a single truth. Russian state-sponsored media outlets like RT and Sputnik, along with a vast network of proxy websites, ostensibly independent "milbloggers", and paid influencers, play a crucial role in this ecosystem. These campaigns are often tailored to specific linguistic and cultural contexts, targeting vulnerable communities in Eastern and Southeastern Europe, such as Serbian- and Bulgarian-language audiences, with messages designed to resonate with local grievances or historical perspectives. The use of "local narrative proxies", domestic individuals or groups who willingly or unwittingly amplify Kremlin-friendly narratives, is a key tactic for lending credibility and local relevance to these campaigns.

The potency of the "proxy war" narrative, in particular, lies in its ability to tap into pre-existing sentiments within various Eastern and Southeastern European societies. It often resonates with anti-establishment, anti-globalist, or isolationist currents, offering a seemingly straightforward, if conspiratorial, explanation for a highly complex and tragic conflict. For audiences already sceptical of mainstream media, their own governments, or the foreign policies of major Western powers, such narratives can be particularly attractive. In nations with strong nationalist political parties or movements, as seen in parts of Slovakia or Bulgaria, the "proxy war" framing can be readily co-opted to fit domestic political agendas that emphasize national sovereignty against perceived external interference, whether from the West or Russia. The narrative's simplicity, great powers clashing while smaller nations suffer the consequences, can hold more appeal for populations with lower levels of media literacy or those who place high trust in alternative or state-influenced media outlets than do more nuanced geopolitical analyses. Thus, the effectiveness of this narrative is not solely a testament to Russian propagandistic skill; it is also a function of its capacity to activate and amplify latent societal grievances, historical anxieties, and pre-existing worldviews, transforming it into a powerful instrument for political mobilization and societal polarization.

The intended and, in some cases, actual effects of these sustained disinformation campaigns on public opinion in Eastern and Southeastern Europe are significant and multifaceted. A primary objective is to undermine popular support for military and financial aid to Ukraine. Narratives are crafted to convince citizens in supporting countries that such aid is futile, merely prolongs the suffering, and is unaffordable amidst domestic economic challenges, or primarily benefits corrupt Ukrainian elites or external arms manufacturers. For example, in Slovakia, specific narratives have pushed for a halt to military aid to Ukraine.

Public opinion polls across Europe show varying levels of support for aid, with some southeastern European countries exhibiting more skepticism[1]. Another key aim is to fuel anti-NATO, anti-EU, and anti-Western sentiment more broadly. By consistently portraying NATO as an aggressive alliance responsible for provoking the conflict, and framing the war as a US-led proxy endeavour, these campaigns seek to erode public trust in these institutions and their security guarantees. This is particularly targeted at populations in countries like Serbia or parts of the Balkans where historical grievances against NATO (e.g., the 1999 intervention in Kosovo) or existing cultural affinities with Russia provide fertile ground for such messaging.

These competing narratives inevitably contribute to increasing political polarization within Eastern and Southeastern European societies. The war in Ukraine and the question of how to respond to it have deepened existing ideological divides and, in some cases, created new ones, making national consensus on foreign and security policy more elusive. This polarization is evident in countries like Slovakia and the Czech Republic, where public opinion is sharply divided, and opposition parties often leverage pro-Russian or anti-Western narratives to criticize government policies and mobilize support. For instance, a significant portion of Slovaks (28% in one poll) believed the West provoked Russia into war, and 49% disapproved of EU support for Ukraine.

Such shifts in public opinion, fuelled by disinformation, can exert considerable pressure on government policy. While geopolitical imperatives and alliance commitments are often paramount, policymakers in democratic states cannot entirely ignore public sentiment, especially if it becomes widespread or intensely held. Sustained public opposition to aiding Ukraine or supporting sanctions against Russia can constrain a government's options or lead to more cautious, ambivalent, or delayed policy responses. In Bulgaria, for example, the active promotion of pro-Russian narratives by influential figures, including some with military backgrounds, can impact policy debates and public enthusiasm for robust NATO/EU actions against Russia. Similarly, Kremlin-aligned narratives about the Ukraine war demonstrably affect policy discussions and political discourse within the Visegrad countries, exploiting existing societal concerns about economic stability, energy security, or national sovereignty.

The effectiveness of the “US-led proxy war” narrative in parts of Southeastern Europe can contribute to more neutral foreign-policy positions or reluctance to align fully with Western strategies. When publics are persuaded that sanctions, military aid or NATO deployments serve external interests rather than national security, governments face stronger incentives to delay, dilute or rhetorically distance themselves from collective policies. This creates a feedback loop: visible policy divergences, such as Hungary’s cautious approach or debates over military aid in Slovakia, are then used by Russian propaganda as evidence that Western unity is weakening. Countering this dynamic requires more than fact-checking. Because proxy-war narratives exploit historical grievances, economic anxieties and identity-based cleavages, resilience depends on locally credible strategic communication, media literacy, energy diversification and policies that address the domestic vulnerabilities through which disinformation gains traction.

[1] Peter Učeň, *The Russia–Ukraine War and the Radicalization of Political Discourse in Slovakia*, ECPS, March 4, 2023, https://www.populismstudies.org/the-russia-ukraine-war-and-the-radicalization-of-political-discourse-in-slovakia/ (12.02.2026); Metodieva, Asya, *Russian Narrative Proxies in the Western Balkans*, German Marshall Fund, 2019, https://www.gmfus.org/sites/default/files/Russian%2520Narrative%2520Proxies%2520in%2520Balkans.pdf. (12.02.2026)

The security, diplomatic and informational dimensions analysed above are therefore mutually reinforcing rather than separate. Security adaptation changes diplomatic incentives: as NATO's eastern flank is reinforced, frontline members become more confident in advocating sustained support for Ukraine, while more ambivalent states face sharper pressure to justify deviation from alliance consensus. Diplomatic divergence, in turn, creates openings in the information domain, because Moscow-aligned narratives can amplify disagreements over sanctions, military aid or energy costs as evidence that Western unity is fragile or externally imposed. Information operations then feed back into security policy by shaping public tolerance for defence spending, allied deployments and assistance to Kyiv. The proxy-war frame thus operates as a connecting mechanism between military deterrence, diplomatic bargaining and societal resilience.

Results and Original Contribution

This study finds that the proxy-war dynamic of the Russia–Ukraine conflict has a differentiated rather than uniform regional impact. Its effect depends on how indirect great-power confrontation is filtered through alliance status, geography, energy dependence and domestic politics. In frontline NATO/EU states, the proxy-war frame reinforces threat perception and strengthens balancing through defence spending, military modernization and demands for NATO reassurance. In states where energy dependence, domestic polarization or historical-cultural ties to Russia are stronger, the same frame can legitimize hedging, selective alignment or claims of neutrality. In exposed partner states and politically contested media environments, it increases susceptibility to hybrid pressure by turning external strategic narratives into domestic political cleavages.

The article's contribution is therefore not to claim that the Russia–Ukraine war can be reduced to a proxy war. Such a claim would understate Ukraine's agency and overstate the coherence of Western or Russian control. Rather, the contribution is to show that the proxy-war lens is analytically useful when treated as both a material structure and a narrative resource. It explains how military assistance, alliance adaptation, sanctions politics and information warfare interact to produce divergent regional strategies across the Black Sea–Balkan–Eastern Mediterranean corridor.

Conclusions

Analysed through a qualified proxy-war framework, the Russia–Ukraine conflict operates as both geopolitical reality and contested narrative. The argument advanced in this article is not that Ukraine lacks agency or that the war can be reduced to a confrontation between Russia and the West. Rather, the article has argued that the indirect Russia–West dimension conditions how regional states interpret risk, allocate resources, justify diplomatic choices and respond to hybrid pressure. The proxy-war lens is analytically useful because it explains how military assistance, sanctions, alliance signalling and competing strategic narratives interact inside domestic and regional political arenas.

The comparative cases support this claim. Poland and the Baltic states illustrate how geographical exposure and historical memory translate the proxy-war frame into strong balancing, military modernization and demand for forward deterrence. Romania and Bulgaria demonstrate how Black Sea exposure produces broadly similar alliance incentives but different degrees of domestic contestation. Hungary and Serbia show that formal alliance membership or European orientation does not automatically generate alignment when energy dependence, regime strategy and public narratives create incentives for hedging. Moldova shows the vulnerability of exposed non-NATO partners, where military risk, energy pressure

and information operations intersect more directly. These cases confirm that the war's regional impact is not linear; it is mediated by alliance status, domestic politics and exposure to Russian leverage.

The three dimensions examined in the article, security, diplomacy and information, should therefore be understood as a single interactional process. Security adaptation generates diplomatic pressure by forcing states to define their position on deterrence, sanctions and aid to Ukraine. Diplomatic divergence then becomes material for information campaigns, which portray disagreement within NATO or the EU as evidence of Western fatigue, hypocrisy or external manipulation. Information warfare, in turn, affects security policy by shaping public support for defence spending, allied deployments and assistance to Kyiv. The proxy-war frame thus does not merely describe the conflict; it becomes part of the mechanism through which the conflict reorganises regional politics.

The policy implications are consequently differentiated. For frontline NATO members, the priority is credible deterrence combined with resilience against cyber, drone and infrastructure threats. For Black Sea states, the focus should be maritime security, air and missile defence, military mobility and protection of energy and logistics corridors. For Western Balkan balancers, policy should combine EU conditionality, energy diversification and locally credible counter-disinformation strategies rather than generic calls for alignment. For exposed partners such as Moldova, support should concentrate on institutional resilience, election security, cyber defence, energy security and crisis communication. For intra-alliance dissenters, the relevant policy challenge is not only persuasion but reducing structural dependencies that make hedging politically attractive.

These conclusions should be stated with caution. The war has accelerated contestation across the Black Sea–Balkan–Eastern Mediterranean corridor, but the long-term regional order remains contingent on the military trajectory of the conflict, the durability of US and European support for Ukraine, Russia's capacity for prolonged coercion and domestic political change within regional states. A plausible scenario is not a clean return to pre-2022 stability but a prolonged period of uneven deterrence, selective cooperation and persistent hybrid pressure. Future research could test the argument more systematically by combining public-opinion data, content analysis of disinformation narratives and closer within-case process tracing of policy decisions before and after key escalation moments.

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AUTONOMOUS DECISION-MAKING IN ARMED CONFLICT. EVALUATING THE LAWS OF WAR THROUGH THE GAZA EXPERIENCE

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Abstract

Autonomous targeting systems are becoming more common and established as an armament system, yet international humanitarian law (IHL) was designed for human decision-makers, not algorithms. Focusing on the 2023-24 Gaza conflict, this study questions the effectiveness of existing legal frameworks applied during a conflict in which reports indicate AI systems, such as Lavender, Habsora, and Where's Daddy?, were used to generate targets at unprecedented levels and speeds in modern warfare.

Based on Critical Algorithm Studies and socio-technical assemblage theory, and using a legal-analytical, case-based approach, the study investigates the meaning and implications of IHL principles of distinction, proportionality, and precaution in an algorithmic context, and their failure. It found that the existing frameworks are structurally deficient because the operational conditions of AI-assisted targeting systematically undermine the cognitive and institutional practices that underpin compliance.

This phenomenon, digital dehumanization, in which people are treated as part of a probabilistic data classification rather than as legal persons - widens compliance gaps and, in certain cases, leads to new legal breaches. The study concludes with concrete governance proposals, such as auditability standards, disaggregated liability-attribution frameworks, and minimum human-verification protocols, as the basis for an AI-specific legal regime suitable to contemporary algorithmic warfare.

Keywords: AI-assisted targeting; Digital dehumanization; International Humanitarian Law (IHL); Lethal Autonomous Weapon Systems (LAWS)

Introduction

Autonomous Weapon Systems (AWS) are gravitating from speculative technology to active tools in contemporary battlefields. This trend raises concern among actors because the law governing armed conflict is still heavily hinged on subtle assumptions about human judgment and responsibility. International Humanitarian Law (IHL) aims to strike a delicate balance between military necessity and the principles of humanity. Yet it does so with human decision-makers in mind, not machines that may select or engage targets on their own.[2,3] Within the context of weapons systems, the concept of autonomy is layered. There is the human perspective, which concerns itself with the level of control humans exert over

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[2] Diakonia, *Basic Principles of International Humanitarian Law*, Diakonia, https://www.diakonia.se/ihl/resources/international-humanitarian-law/basic-principles-ihl/ (12.11.2025)

[3] Anaïs Maroonian, "Proportionality in International Humanitarian Law: A Principle and a Rule," Lieber Institute for Law and Warfare, October 2022, https://lieber.westpoint.edu/proportionality-international-humanitarian-law-principle-rule/ (12.11.2025)

machines. Here, humans could be in, on or out of the loop[1]. While in the loop, humans select and engage targets through the machine's agency. While on the loop, the machine selects and engages the target, while humans retain oversight and the option to override the machine's decisions manually. Humans are out of the loop when the machines select and engage the target without requiring any human input beyond activation.

The second perspective concerns itself with the level of complexity and intelligence of the machine. From this perspective, the machine could be automatic, automated or autonomous. The machine is automatic to the extent that it has simple mechanical responses to environmental input. It is automated through a complex but predictable algorithm that operates on if-then-else logic. A machine that self-directs upon activation and possesses the capacity for self-learning and upgrading, to the extent of acting beyond the limits of its initial codes in a fully autonomous system.[2] The third perspective on defining autonomy is not much about autonomy itself but the nature of the task assigned to the machine. The critical function that defines autonomy is the selection and engagement with targets.[3] This is where autonomy directly intersects with the fundamental principles of IHL.[4] This complexity shapes the ongoing struggle to define what should count as an Autonomous Weapon System. States working within the United Nations (UN) Convention on Certain Conventional Weapons (CCW) process, along with scholars and advocacy groups, hold sharply different views.

The broad perspective, most prominently advanced by the International Committee of the Red Cross (ICRC), defines AWS as any weapon system that can select and attack targets without human intervention in its critical functions, namely, the processes of identifying, selecting, and applying force against a target.[5] This framing includes both fully autonomous and semi-autonomous systems, provided that autonomy is exercised in one or more of these decisive stages. On the other hand, for the United States (US) Department of Defense (DoD), AWS are systems that "once activated, can select and engage targets without further intervention by a human operator"[6]. This narrow perspective excludes decision-support systems, AI-assisted targeting software, or predictive analytical tools similar to those reportedly used in Gaza in the period under review. The United Nations Group of Governmental Experts (GGE) under the Convention on Certain Conventional Weapons (CCW) highlighted this definitional tension in its reports from 2019 to 2024.[7] States like Austria and many from the Global South have aligned with the broader framing, highlighting the continuum of autonomy and the dangers of algorithmic decision-making even in non-lethal dimensions. Other countries, including the United States, Israel, and Russia, have favored the narrower definition, limiting AWS to fully autonomous systems. This definition

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Maziar Homayounnejad, *Regulating Lethal Autonomous Weapon Systems I: Assessing the Sense and Scope of 'Autonomy'*, "Emerging Military Weapon Systems", TLI Think Paper 76, The Dickson Poon School of Law, King's College London, 2017, https://ssrn.com/abstract=3027540 (12.11.2025)

[2] Maziar Homayounnejad, *Op. cit,* p. 10

[3] *Ibidem*, p. 11

[4] Neil Davison, *What You Need to Know about Autonomous Weapons*, International Committee of the Red Cross (ICRC), https://www.icrc.org/en/document/what-you-need-know-about-autonomous-weapons (12.11.2025)

[5] International Committee of the Red Cross (ICRC), *Autonomous Weapon Systems: Implications of Increasing Autonomy in the Critical Functions of Weapons*, ICRC, Geneva, 2016, pp. 5-6

[6] U.S. Department of Defense, *Directive 3000.09: Autonomy in Weapon Systems*, DoD, Washington, D.C., Updated 2023, Sec. 3(a)

[7] United Nations, *Report of the 2019 Session of the Group of Governmental Experts on Emerging Technologies in the Area of Lethal Autonomous Weapons Systems*, CCW/GGE.1/2019/3, United Nations Office, Geneva, 2019

divide is also prominent in scholarly discourse. Sharkey and Roff construe AWS as a spectrum of autonomy, ranging from lethal to non-lethal systems.[1] For Arkin, AWS is a system that is completely independent upon activation.[2] This study aligns with the ICRC's broad definitional approach, which provides a more accurate analytical framework for evaluating AWS deployment in Gaza and its compliance with the principles of distinction, proportionality, and precaution under International Humanitarian Law.

Beneath the definitional trouble lies a deeper question: can autonomy be squared with the core principles of IHL? Proponents argue that AWS could enhance compliance with International Humanitarian Law (IHL) by reducing human error, improving precision, and limiting emotional or retaliatory impulses in combat.[3] Arkin is of the view that autonomous systems can be engineered to comply with the laws of war more effectively than human soldiers, who are susceptible to fatigue, fear, and bias.[4] Anderson and Waxman opine that a ban on AWS would be hasty and amount to stifling technological progress, highlighting that the existing legal framework of IHL sufficiently governs the responsible development and deployment of AWS.[5] These arguments often rest on the assumption that autonomy, when properly engineered, can lead to more discriminating and proportional deployment of force. Critics, however, counter that AWS risks eroding the moral agency and accountability that underpin humanitarian law.[6] Sharkey argues that delegating life-and-death decisions to machines negates the principle of human judgment central to jus in bello.[7] The International Committee of the Red Cross (ICRC) and similar organizations warn that the opaqueness of machine-learning algorithms and the fluidity of complex combat environments make it impractical to ensure reliable compliance with the principles of distinction, proportionality, and precaution.[8] Heather Roff stresses that even semi-autonomous systems introduce new layers of uncertainty and bias into targeting processes.[9] From this standpoint, AWS poses technical challenges on the one hand and, on the other, a normative concern that could blur human accountability in combat, eroding the moral limits that IHL was designed to preserve.

Purpose and Objectives

Current research in the field of AWS reflects a lack of conceptual cohesion, with technical debates intersecting with legal uncertainties, and ethical concerns blurring into policy challenges. This complexity is the central problematic that informs the present study. The ongoing advancement and practical deployment of Artificial Intelligence (AI) and Machine Learning (ML) technologies in contemporary warfare stand in stark contrast to the absence of a robust shared framework for their understanding and governance. The above reality makes it difficult to measure the actual (or potential) compliance of AWS with the core

[1] Noel Sharkey, *Killing Made Easy: From Joysticks to Politics*, in Patrick Lin; Keith Abney; George A. Bekey (Eds.), "Robot Ethics: The Ethical and Social Implications of Robotics", MIT Press, Cambridge (MA), 2012, pp. 111-128
[2] Ronald C. Arkin, *Governing Lethal Behavior in Autonomous Robots*, CRC Press, Boca Raton, 2009
[3] Ronald Arkin, *Op, cit.,* p. 39
[4] *Idem*
[5] Kenneth Anderson, Matthew Waxman, *Op, cit.,* p. 8
[6] Human Rights Watch, *Losing Humanity: The Case Against Killer Robots*, HRW, New York, 2012, pp. 2-5.
[7] Noel Sharkey, *The Evitability of Autonomous Robot Warfar*e, "International Review of the Red Cross", Vol. 94, No. 886, 2012, pp. 787-799
[8] International Committee of the Red Cross (ICRC), *Autonomous Weapon Systems: Implications of Increasing Autonomy in the Critical Functions of Weapons*, ICRC, Geneva, 2016, pp. 5-8
[9] Heather M. Roff, Op. cit., p. 218; *The Strategic Robot Problem: Lethal Autonomous Weapons in War*, "Journal of Military Ethics", Vol. 13, No. 3, 2014, pp. 211-227

principles of international humanitarian law (IHL). A case-by-case evaluation is endorsed as an effective approach to assessing AWS's compliance with IHL.

As Winter observes, "assessments must be made on a case-by-case basis, with reference to the specific parameters of each autonomous weapon system and the environment in which it will operate" since compliance depends on technological capability and context. Schmitt shares Winter's position, noting that mere possession of AWS does not, in itself, constitute sufficient grounds for a violation under IHL, but its unlawful deployment does[1] [2]. These perspectives underscore that responsible deployment of AWS requires individualized, multidisciplinary review rather than categorical judgments. Rather than seeking a sweeping, universal answer about all of AWS, this study will examine specific systems, their practical deployments, their technical feasibility, the operational environments in which they were deployed, and the nature of their assigned tasks. This will be done from a practical standpoint, determining their compliance with the principles of distinction, proportionality, and precaution, which are cornerstones of the IHL framework.

Some studies have adopted this case-by-case approach to the AWS debate, including in the Gaza theatre. Some scholars have adopted the case-study methodology to interrogate how autonomy functions in real combat environments. The United States' use of the Aegis Combat System and the Patriot missile defense system in incidents such as the USS *Vincennes* shootdown, 1988, and the 2003 Iraq War have long been treated as early empirical sites for examining "automated lethality"[3]. Arkin and Anderson argue that partial autonomy has existed for decades and that case-specific reviews provide practical pathways to appraising compliance with IHL principles.[4] Similarly, Roff's study on the Harpy loitering munition shows that even limited autonomy in deployment creates operational uncertainties in complex environments.[5] The United Nations Institute for Disarmament Research (UNIDIR) has compiled comparative case studies on emerging AWS, highlighting the fluidity of autonomy and its opacity to external verification.[6] More recently, investigative journalism and policy-oriented studies on Israel's 2023-24 campaign in Gaza have documented the deployment of AI-driven systems for labelling terrorists, target generation, and real-time tracking, representing the most current empirical attempt to test theoretical claims about AWS precision and control[7].

However, these works do not offer a highly granular, publicly verified study of offensive AWS use in a dense urban environment such as Gaza between 2023-24, with named systems and strike-by-strike analysis. The recent Gaza-focused investigations, though groundbreaking, operate in the grey zone between journalistic exposé and formal academic inquiry, leaving many technical details unverifiable.[8] The overall objective is to empirically

[1] Elliot Winter, *The Compatibility of Autonomous Weapons with the Principles of International Humanitarian Law*, "Journal of Conflict and Security Law", Vol. 27, No. 1, 2022, pp. 6-7
[2] Michael N. Schmitt, *Autonomous Weapon Systems and International Humanitarian Law: A Reply to the Critics*, "Harvard National Security Journal Feature", 2013, p. 25
[3] Paul Scharre, *Army of None: Autonomous Weapons and the Future of War*, W. W. Norton, New York, 2018, pp. 62-70
[4] Ronald C. Arkin, *Op. cit*., p. 93
[5] Heather M. Roff, *Op. cit.*, p. 218
[6] United Nations Institute for Disarmament Research (UNIDIR), *The Weaponization of Increasingly Autonomous Technologies: Autonomous Weapon Systems and Cyber Operations*, UNIDIR, Geneva, 2017, pp. 14-18
[7] Yuval Abraham, *Lavender: The AI Machine Identifying Targets in Israel's Gaza War*, "+972 Magazine", April 2024
[8] *Idem*

evaluate the compliance of those AWS deployments (or alleged deployments) with the IHL principles of distinction, proportionality, and precaution in attack.

Critical Algorithm and Socio-Technical Assemblage

The study builds its theoretical underpinning on two frameworks to systematically interrogate the Gaza operations of 2023–2024 from the perspectives of compliance with core IHL principles and the impact of the use of autonomous and semi-autonomous targeting tools. The Critical Algorithm Studies (CAS) are an interdisciplinary space whose focus is to analyses the inner workings of the systems referenced, in relation to the algorithm being created and the institutional values that guide it. This was complemented by the Socio-Technical Assemblage theory, which helps understand that technologies are not simply devices but are interwoven in a network of people, institutions, and material infrastructures that shape AWS performance. The Critical Algorithm lens draws on work by scholars such as Gillespie, Crawford, Kalluri, and others who argue that algorithms reflect the politics of their datasets, the incentives of the institutions that deploy them, and the shortcuts embedded in their design choices.[1] This matters for Gaza because the systems at the center of the debate (and related target-development pipelines) did not operate in a vacuum. Their strike suggestions were based on training data of varying quality, behavioral proxies selected by analysts, and thresholds set during periods of operational pressure[2].

The second lens builds on the work of scholars such as Latour, Suchman, Crampton, and Chamayou. It treats AWS not as isolated devices but as nodes inside a wider network of command structures, targeting cells, lawyers, data engineers, pilots, and communication channels. A strike attributed to an autonomous system is therefore better understood as the outcome of interactions across the whole assemblage.[3] This framework prompts a careful mapping of how information moved through the kill chain during the Gaza operations, drawing attention to distributed agency and the material infrastructures through which decisions were enacted[4]. It also sets up the study to examine where human judgment entered the loop and where it thinned out[5]. This approach supports the study's objective by focusing on how organizational routines either tightened or weakened IHL-relevant safeguards. It also helps explain the gap between stated doctrine and observed strike patterns[6].

Critical Algorithm Studies aids analysis by identifying what each system was crafted to accomplish, its functional reliability, and the built-in error margins in the Gaza context. This feeds into the assessment of whether the systems could realistically support distinction, proportionality, and precaution. The socio-technical assemblage paradigm prompts the examination of how the urban environment, communication constraints, sensor coverage, and battle damage assessments shaped system outputs. It supports the proportionality analysis by showing how these constraints interact with algorithm-assisted targeting. Integrating both frameworks enables the study to track how algorithm-aided target recommendations, real-time

[1] Tarleton Gillespie, *Custodians of the Internet: Platforms, Content Moderation, and the Hidden Decisions That Shape Social Media*, Yale University Press, New Haven, 2018, pp. 12-18, 45–52; Pratyusha Kalluri, *Don't Ask If Artificial Intelligence Is Good or Fair, Ask How It Shifts Power*, "Nature", No. 583, 2020, p. 169
[2] Yuval Abraham, *Op. cit.*, p. 2
[3] Bruno Latour, *Reassembling the Social: An Introduction to Actor-Network-Theory*, Oxford University Press, Oxford, 2005
[4] Lucy Suchman, *Human-Machine Reconfigurations: Plans and Situated Actions*, 2nd Ed., Cambridge University Press, Cambridge, 2007
[5] Mark B. Salter, Jeremy W. Crampton, *Introduction: Field Guide to Security Assemblages, in Security/Geography: A Field Guide to Security Assemblages*, University of Georgia Press, Athens, 2014
[6] Grégoire Chamayou, *A Theory of the Drone*, trans. Janet Lloyd, The New Press, New York, 2015

tracking flowed through human decision-making and ultimately contributed to the actual strikes, permitting a direct evaluation of whether the structural design of the assemblage made lawful outcomes more or less likely. Put together, the two frameworks link the conceptual debate on AWS to a practical evaluation of the systems deployed in Gaza. It grounds the popular legal analysis in the realities of how these systems operate, why certain strike patterns emerged, and where compliance gaps may reside.

AI-Assisted Targeting Systems and the Transformation of the Targeting Cycle in Gaza

Investigative reporting and scholarly engagement have highlighted the IDF's deployment of specific algorithm-assisted systems, including "The Gospel" (or Habsora, in Hebrew), "Lavender", and a real-time tracking tool named "Where's Daddy" in the military operations conducted by the IDF in the Gaza Strip between 2023 and 2024, codenamed Swords of Iron. Though their system card remains classified, available accounts suggest that they constitute part of a layered intelligence infrastructure designed to process large volumes of surveillance and intelligence data and generate potential recommendations.[1] This level of adoption reflects the broader increasing reliance on artificial intelligence and machine-learning tools in contemporary warfare.[2] At the design level, these systems perform distinct but related functions across the phases of the targeting cycle. Lavender is a machine-learning tool designed to identify suspected militants by analyzing communications metadata, digital behavioral traces, and historical intelligence records. These inputs can include belonging to the same WhatsApp group with a known militant, frequently changing one's phone and address, cellular information, social media connections, battlefield information, phone contacts, and pictures in phone galleries.[3] Investigative reporting indicates that in the opening weeks of the war, Lavender flagged about 37,000 individuals as militants, and that these recommendations were accorded the integrity of human outputs. This volume suggests a target identification scale that dwarfs the capacity of traditional human-dominated intelligence processes.[4] This is indicative of a broader shift toward high-volume, data-driven target generation.

In contrast, Habsora operates at the level of infrastructure analysis, processing geospatial intelligence and other data to identify buildings or locations believed to be associated with militant activity. Similar to Lavender, it processes enormous amounts of data that rival the capacity of thousands of intelligence officers while producing real-time bombing-site recommendations[5]. The third system under review, "Where's Daddy?", operates downstream from these identification processes by monitoring the movement patterns of individuals previously flagged as militants and notifying operators when they arrive at particular strike-suitable locations, mostly their homes.[6] Collectively, these systems suggest an architecture in which algorithmic tools operate sequentially across the targeting cycle, identifying suspected militants, identifying structures associated with militant activities, and

[1] Yuval Abraham, *Op. cit.*, p. 2
[2] Paul Scharre, *Army of None: Autonomous Weapons and the Future of War*, W. W. Norton, New York, 2018, p. 8-9, p. 65, pp. 346-347; Michael C. Horowitz, *The Diffusion of Military Power: Causes and Consequences for International Politics*, Princeton University Press, Princeton, 2010, p. 4-5, 217
[3] Yuval Abraham, *Op. cit.*, p. 2
[4] *Idem*
[5] Yuval Abraham, *A Mass Assassination Factory: Inside Israel's Calculated Bombing of Gaza*, "+972 Magazine", 2023, https://www.972mag.com/mass-assassination-factory-israel-calculated-bombing-gaza/ (12.02.2026)
[6] *Idem*

monitoring the movements of previously flagged individuals until they arrive at suitable potential strike locations.

These systems rely on extensive data infrastructures capable of processing diverse forms of intelligence generated through signals interception, satellite imagery, telecommunications metadata, and other forms of digital monitoring. Machine-learning models are particularly suited to analysing these datasets because they can detect statistical patterns across large volumes of data that may be difficult for human analysts to identify. They are valued for their ability to transform complex data streams into structured analytical outputs that guide human attention toward potentially relevant signals[1].

Among other factors, the reliability of algorithmic analysis significantly depends on the quality and structure of its data environment. The outputs of Machine Learning systems are a product of input datasets that may be incomplete, unclear, or poorly validated, particularly when data is voluminous and varies in reliability.[2] When data sets are plagued with gaps and outdated information, they introduce and propagate systematic bias into models, complicating analysis, reducing predictive validity, and producing unreliable outcomes.[3] In densely populated urban environments such as Gaza, where civilian populations and militants share communications infrastructure and residential spaces, behavioral data can become difficult to interpret reliably. Research on algorithmic decision-making submits that biases and errors in training datasets propagate through automated classification systems and become amplified when algorithms operate at scale.[4] These dynamic raises concern that flawed data may influence algorithmic classifications in ways that are difficult for human reviewers to detect. Reports on the referenced conflict submitted that some data used to inform the recommendations of the AI-assisted targeting systems deployed was flawed, and that human operators failed to detect the attendant errors in those recommendations. Lavender had an estimated margin of error that human reviewers accepted under operational urgency.[5] Human Rights Watch corroborated the claim, submitting that AI-assisted targeting tools were fed defective data and inaccurate approximations, including bogus geolocation and metadata proxies.[6] In such circumstances, recommendations were derived from probabilistic pattern matching across defective datasets, making it difficult for human reviewers to objectively assess their reliability, particularly under conditions of high operational tempo[7].

The organizational workflow through which algorithmic outputs are integrated into military decision-making structures is also of significant importance. AI-assisted targeting

[1] Kate Crawford, *Atlas of AI: Power, Politics, and the Planetary Costs of Artificial Intelligence*, Yale University Press, New Haven, 2021

[2] International Committee of the Red Cross (2019/2023); Paulus et al., 2019; GCHQ cited in AI intelligence literature.

[3] Solon Barocas, Moritz Hardt, Arvind Narayanan, *Fairness and Machine Learning*, 2023; Cathy O'Neil, *Weapons of Math Destruction*, Crown, New York, 2016; K. Emmanuel et al., *A Survey on Missing Data in Machine Learning*, "Journal of Big Data 8", No. 1, 2021, p. 140

[4] Cathy O'Neil, *Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy* Crown, New York, 2016

[5] Yuval Abraham, *Op. cit.*, p. 2

[6] Human Rights Watch, *Questions and Answers: Israeli Military's Use of Digital Tools in Gaza*, 2024, https://www.hrw.org/news/2024/09/10/questions-and-answers-israeli-militarys-use-digital-tools-gaza (21.02.2026)

[7] Lisa Wiese, Charlotte Langer, *Gaza, Artificial Intelligence, and Kill Lists*, "Verfassungsblog", May 16, 2024, https://verfassungsblog.de/gaza-artificial-intelligence-and-kill-lists/, DOI: 10.59704/07a0756a3c08e64a; Royal United Services Institute, *The Israel Defense Forces' Use of AI in Gaza: A Case of Misplaced Purpose*?, 2024, https://www.rusi.org/explore-our-research/publications/commentary/israel-defense-forces-use-ai-gaza-case-misplaced-purpose (21.02.2026)

systems ideally function as decision-support tools rather than autonomous weapons, meaning that their outputs are reviewed by human analysts before operational decisions are taken. Within military institutions, this process typically involves intelligence analysts who interpret algorithmic recommendations, operational planners who evaluate potential strike options, and legal advisers who assess compliance with IHL[1]. In principle, this structure ensures that responsibility for the use of force resides with human decision-makers. However, the adoption of AI-enabled target recommendation systems can reshape how analysts interact with intelligence information. When algorithms generate large numbers of potential targets in short periods, analysts may increasingly over-rely on these outputs to cope with information overload, even when independent verification might be warranted. Research in human-machine interaction captures this dynamic as automation bias.[2] Empirical accounts indicate that the IDF dealt with the AI-systems-induced recommendation overload through a combination of temporal compression, cognitive delegation, and organizational adaptation[3]. There were documented instances in which the duration of human review of AI-system-generated recommendations lasted only 20 seconds, with reviewers' roles sometimes limited to gender confirmation.[4] Rather than treating errors as anomalies to be resolved, operators accepted varying margins of error in algorithmic classifications, thereby tacitly institutionalizing uncertainty in high-tempo operations.[5] Analysts had their roles reduced to filtering AI-generated recommendations rather than independent target identification. [6] Overall, the scaling effects of these systems contributed to what has been aptly described as a "target factory" model, with the rate of target generation dramatically outnumbering that of previous Gaza conflicts[7].

These institutional dynamics hold implications concerning the legal and ethical framework governing armed conflict. International humanitarian law requires that parties to a conflict distinguish between combatants and non-combatants, ensure that anticipated civilian harm is not excessive compared to anticipated military advantage, and take all feasible precautions in the use of force.[8] A Human Rights Watch investigation into an Israeli airstrike on a residential building in central Gaza revealed that the attack killed at least 106 civilians without a definite military objective, leading the organization to classify it a war crime[9]. Amnesty International documented repeated strikes on residential buildings in Gaza that resulted in the deaths of entire households, often in circumstances where the presence of a

[1] Paul Scharre, *Op. cit.*, p. 55, p. 98, p. 129, p. 191, p. 216; Kate Crawford, *Op. cit.*, p. 189
[2] Raja Parasuraman and Victor Riley, *Humans and Automation: Use, Misuse, Disuse, Abuse*, "Human Factors", Vol. 39, No. 2, 1997, pp. 230–253, https://doi.org/10.1518/001872097778543886
[3] Royal United Services Institute, *The Israel Defense Forces' Use of AI in Gaza: A Case of Misplaced Purpose?*, 2024
[4] Business Insider, *Israel's Use of AI in Gaza Offers a Glimpse into the Future of Warfare*", April 2024; Yuval Abraham, *Op. cit.,* p. 3
[5] Le Monde, *Israeli Army Uses AI to Identify Tens of Thousands of Targets in Gaza*, April 5, 2024; Abraham, *Op. cit.*, p. 34
[6] Yuval Abraham, *A Mass Assassination Factory: Inside Israel's Calculated Bombing of Gaza*, "+972 Magazine", 2023; The Guardian, *The Gospel: How Israel Uses AI to Select Bombing Targets in Gaza*, December 1, 2023
[7] *Idem*
[8] International Committee of the Red Cross, *Customary International Humanitarian Law, Volume I: Rules*, Cambridge University Press, Cambridge, 2005
[9] Human Rights Watch, *Gaza: Israeli Strike Killing 106 Civilians an Apparent War Crime*, April 4, 2024, https://www.hrw.org/news/2024/04/04/gaza-israeli-strike-killing-106-civilians-an-apparent-war-crime (12.03.2026)

target and by implication the existence of a significant military objective was unclear.[1] A broader assessment by Human Rights Watch submitted that several Israeli attacks during the referenced campaign resulted in high civilian casualties relative to the anticipated military advantage, raising concerns about disproportionate use of force.[2] This question is whether meaningful attention was paid to proportionality assessments or whether they were ignored under military exigencies triggered by a surge in recommendations from AI-assisted systems.

Beyond operational concerns, the deployment of AI-assisted targeting systems also holds broader strategic and political implications. Added to signaling technological sophistication in the international security environment, armed conflicts also constitute environments in which emerging technologies are tested and refined under operational conditions.[3] The reported IDF deployment of algorithmic targeting systems in Gaza, along with the observed impact on the tempo of warfare, may have been an opportunity for the IDF to signal military sophistication while testing and refining AI-enabled targeting systems under real combat conditions. The initial volume of AI-systems recommendations in the first few weeks and the eventual tapering as the conflict progressed may suggest testing and refinement.

The increasing adoption of algorithmic targeting systems in contemporary warfare and their multiplier effect on the tempo of armed conflict (as observed in Gaza) may indicate a deeper shift in how militaries define potential targets. When algorithmic systems translate complex social realities into statistical indicators of suspected affiliation, humans may be represented primarily as probabilistic classifications rather than as real people embedded within a broader civilian environment.[4] As combatants and non-combatants in conflict environments increasingly appear as data profiles (constructed from behavioral signals, communication patterns, or network associations) within military information systems, warfare may gradually lose touch with humanity. This disturbing dynamic is aptly captured as "digital dehumanization". With reference to the referenced Gaza conflict, digital dehumanization does not necessarily arise from a conscious disregard for human life. It is more likely an inadvertent product of the operational logic of Algorithmic systems that process complex social identities and relationships into computational categories for rapid processing. In a densely populated environment like Gaza, with civilians and militants sharing infrastructure and communications networks, algorithmic classifications that over-rely on relational or behavioral indicators may risk blurring legally and morally significant distinctions.[5] The trade-off for attaining enhanced analytical efficiency in this context is an obscured social context in which behaviors occur. The increasing adoption of AI in military intelligence assemblages can influence decision-making patterns by prioritizing machine-generated recommendations, which can, on the one hand, reshape the definition of potential targets and, on the other, subtly redefine the acceptable threshold of risk in the use of force[6].

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[1] Amnesty International, *Damning Evidence of War Crimes as Israeli Attacks Wipe Out Entire Families in Gaza*, October 20, 2023, https://www.amnesty.org/en/latest/news/2023/10/damning-evidence-of-war-crimes-as-israeli-attacks-wipe-out-entire-families-in-gaza/ (12.03.2026)

[2] Human Rights Watch, *Gaza: Israeli Strike Killing 106 Civilians an Apparent War Crime*, April 4, 2024, https://www.hrw.org/news/2024/04/04/gaza-israeli-strike-killing-106-civilians-an-apparent-war-crime (12.03.2026)

[3] Michael C. Horowitz, *Op. cit.*, p. 43

[4] Kate Crawford, *Atlas of AI: Power, Politics, and the Planetary Costs of Artificial Intelligence*, Yale University Press, New Haven, 2021

[5] Cathy O'Neil, *Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy*, Crown Publishing, 2016

[6] Paul Scharre, *Op. cit.*, p. 98, p. 168; Kate Crawford, *Op. cit.*, p. 203

Reports indicate that the IDF adopted scaled collateral damage thresholds, allowing between 15 and 20 civilian casualties for a strike on senior Hamas commanders and lower thresholds, sometimes reaching 10, for lower-ranking operatives, while also pragmatically delegating strike authorizations, previously the preserve of senior officers, to mid-level officers[1].

The ICRC and UN-based forums, like the CCW Group of Governmental Experts on Lethal Autonomous Weapons Systems, have highlighted that meaningful human control be maintained over decisions regarding the use of force, reflecting a growing consensus that human agency cannot be eliminated in life-and-death targeting processes[2]. In a similar vein, emerging scholarship emphasizes that, to preserve accountability and protect non-combatants in conflict zones, Autonomous Weapon Systems should be embedded within layered oversight mechanisms that priorities human agency and responsibility[3]. As military organizations continue to integrate Autonomous Weapons Systems into their intelligence and targeting processes, debates about verification standards, legal responsibility, and the humanitarian consequences of algorithmically mediated warfare are likely to remain central to the evolving governance of military artificial intelligence[4].

But the evidence and reports from the Swords of Iron indicate that algorithmic mediation improves the capabilities of the military, that it is an incremental change to the knowledge base that informs contemporary targeting decisions, and that it shows how commanders conceptually process information, understand what a 'target' is, and what constitutes lawful targeting. As individuals are increasingly labeled targets through probabilistic algorithmic classifications, the interpretive frame through which analysts and commanders understand them shifts. This captures the central claim of this study that AI-assisted warfare introduces a structural tension between computational efficiency and humanitarian restraint. In such environments, the challenge is no longer limited to keeping humans in the loop, but to ensure that human judgment remains meaningful. The study's normative arguments rely on an empirical basis; the processes described in this section - probabilistic classification at scale, compression of human review, institutionalized error tolerance, and the clinical consequences of these processes – are those of harming civilians, which was a feature of the observed targeting architecture that was structurally incompatible with IHL compliance

Digital Dehumanization and Accountability Gaps in AI-Assisted Warfare

This study offers a Gaza-focused analysis of AI-assisted warfare, reframing current developments as the opening phase of a new frontier. The systems under study are integral parts of a targeting infrastructure that accelerates the tempo of warfare while reducing

[1] Yuval Abraham, *Op. cit.* p. 2; The Guardian, *Israel's Use of AI in Gaza*, 2024, 'The machine did it coldly': Israel used AI to identify 37,000 Hamas targets | Israel-Gaza war | The Guardian (11.02.2026)

[2] United Nations Office for Disarmament Affairs, *Report of the 2023 Session of the Group of Governmental Experts on Emerging Technologies in the Area of Lethal Autonomous Weapons Systems – Advance Version*, CCW/GGE.1/2023/2, Geneva, 2023; United Nations General Assembly, *Lethal Autonomous Weapons Systems: Draft Resolution*, A/C.1/78/L.56, 2023

[3] Ilse Verdiesen, Filippo Santoni de Sio, Virginia Dignum, *Accountability and Control over Autonomous Weapon Systems: A Framework for Comprehensive Human Oversight*, "Minds and Machines", No. 31, 2021, pp.137–163 Avi Goldfarb and Jon Lindsay, *Artificial Intelligence in War: Human Judgment as an Organizational Strength and a Strategic Liability,* Brookings Institution, November 2020, p. 1, https://brookings.edu/research/artificial-intelligence-in-war/ (11.02.2026)

[4] Paul Scharre, *Op. cit.*, p. 531, p. 565; United Nations Office for Disarmament Affairs, *Report of the Group of Governmental Experts on Lethal Autonomous Weapons Systems*, 2023

complex social realities to simplified administrative categories.[1] The limited understanding of how their algorithmic outputs are generated creates a technical opacity gap. The flawed data environment in which they operated introduced and propagated systematic bias, reduced predictive validity, and produced unreliable outcomes. Their scaling effects significantly altered the operational workflow, creating an attribution. Strikes resulted in disproportionate civilian casualties compared to the anticipated military advantage, raising concerns about abuse of force and a breach of IHL. Beyond battlefield efficiency, these systems may have been deployed to signal military sophistication while testing and refining them under real conflict conditions. Taken together, this assemblage creates a "war-algorithm" environment where harm cannot be easily traced to a single decision-maker.[2] Against this backdrop, the study advances the normative position that responsibility for targeting decisions must reside with human operators, irrespective of the level of automation, as human agency is not removed but reconfigured through technological mediation[3].

Digital dehumanization refers to the "process where humans are reduced to data, which is then used to make decisions and/or take actions that negatively affect their lives"[4]. It is not a separate violation under international humanitarian law (IHL). Rather, it reshapes how existing legal obligations are carried out by shifting decision-making from contextual human judgment to probabilistic and data-driven assessments. In doing so, it can increase the likelihood that established IHL obligations, such as the prohibitions against indiscriminate or disproportionate attacks and the duty to take feasible precautions, are not meaningfully fulfilled[5]. In practice, this means that individuals may increasingly be evaluated through algorithmic patterns, metadata, or predictive indicators rather than through careful human assessment of their status and surrounding circumstances. In this sense, digital dehumanization operates similarly to automation bias: it is not itself an independent legal breach, but a condition that can make violations more likely. Its legal significance, therefore, lies in how it affects compliance with existing IHL obligations, particularly the duty of commanders to take all feasible precautions and to do everything feasible to verify that targets are lawful military objectives under Articles 57 and 58 of Additional Protocol I. Stauffer argues that autonomous systems can reduce human beings to mere data points, thereby instrumentalizing and dehumanizing those they target. However, this does not create new legal prohibitions under international humanitarian law (IHL). Instead, it raises concerns about how existing rules, particularly those relating to distinction, proportionality, and feasible precautions, are interpreted and applied in increasingly data-driven forms of warfare[6].

Algorithmic targeting becomes legally and ethically problematic when it relies on protected characteristics or treats civilian populations as undifferentiated data categories rather than individuals. While this does not automatically constitute a separate violation under international humanitarian law (IHL), it may undermine the principles of distinction,

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[1] James C. Scott, *Seeing Like a State: How Certain Schemes to Improve the Human Condition Have Failed*, Yale University Press, New Haven, 1998

[2] Dustin A. Lewis et al., *War-Algorithm Accountability*, Harvard Law School Program on International Law and Armed Conflict, 2016

[3] Ingvild Bode, Hendrik Huelss, *Autonomous Weapons Systems and Changing Norms in International Relations*, "Review of International Studies", Vol. 44, No. 3, 2018

[4] Soka Gakkai International, *Digital Dehumanisation Campaign*, 2025, p.1, https://sgi-peace.org/resources/digital-dehumanisation-campaign-videos (21.03.2026)

[5] Brian Stauffer, *A Hazard to Human Rights: Autonomous Weapons Systems and Digital Decision-Making*, Human Rights Watch, New York, 2025. https://www.hrw.org/report/2025/04/28/a-hazard-to-human-rights/autonomous-weapons-systems-and-digital-decision-making (21.03.2026)

[6] *Idem*

proportionality, and non-discrimination, and, in extreme cases, could raise concerns about collective punishment under Article 33 of the Fourth Geneva Convention[1].

Governing Algorithmic Warfare: Legal Responsibility and Policy Implications

As this analysis has shown, however, there were not only things that went wrong in Gaza, but also reasons why it was likely to go wrong, and it has shifted the question of accountability in Gaza from post-hoc analysis to prospective, structural regulation. This section opens with a methodological observation: the system under study is classified. This analysis thus relies on credible secondary sources rather than primary military documents. This limitation is not specific to this study but is inherent to the subject matter itself. The opacity of military AI systems is a core attribute of how states conduct their intelligence activities. What is analytically relevant is that data cannot be accessed through the structure. It is almost impossible for an external party to verify independently whether IHL is being complied with. In the military field, this epistemic gap is one of the main governance failures of algorithmic warfare, not because of a lack of lawfulness on the part of the military, but because there are no conditions for independent scrutiny[2]. This study is not intended to solve that problem; instead, it is working with that problem. Interpretative-analytical contributions are achieved by rigorously engaging with available data to yield defensible policy conclusions. The report on Autonomous weapons systems submitted to the UNGA by the Secretary-General in August 2024, which combined inputs from 73 states and 33 civil society organizations, made it clear that there is widespread concern that (AWS) systems have the potential to change warfare significantly and may strain, or even erode, existing legal frameworks[3]. The document was prepared without relying on classified Israeli military data. Yet, it reached conclusions on the application of IHL that were consistent with those developed in this study, indicating that the analytical approach is correct, even with a limited empirical basis

The need to ensure meaningful human control over the use of force has been highlighted by organizations such as the International Committee of the Red Cross and UN-based forums, particularly the Group of Governmental Experts on Lethal Autonomous Weapons Systems. This study contributes to this debate by deploying a case study to show how AI-assisted targeting systems may subtly erode such control in practice, by significantly altering the conditions under which human operators make decisions, rather than bypassing them outright.[4] By identifying specific gaps and associating them with processes of digital dehumanization, the study offers a pathway for attributing liability in contexts where targets are selected through flawed probabilistic classification, aligning with broader concerns that increasing automation may dilute, rather than eliminate, human judgment in the use of force.[5] It is pertinent to act on these observations rather than rely on the vacuous rhetoric of the

[1] Muzen Ismailovic, *Algorithmic targeting: the role of artificial intelligence in Israeli strikes in Gaza and its ethical implication*, "Éclairage", May 2025, https://www.grip.org/wp-content/uploads/2025/04/EC-2025-02-05-25-MI-IA-Israel-Gaza-version-finale-EN.pdf (21.03.2026)

[2] Vincent Boulanin, Dustin Lewis, *Responsible reliance concerning development and use of AI in the military domain*, "Ethics and Information Technology", Vol. 25, No, 1, 2023, pp. 1-15, https://doi.org/10.1007/s10676-023-09695-2

[3] United Nations Secretary-General. *Autonomous weapons systems: Report of the Secretary-General* (A/79/318). United Nations, 2024, pp. 1-77, https://documents.un.org/doc/undoc/gen/n24/238/45/pdf/n2423845.pdf (21.03.2026)

[4] International Committee of the Red Cross, *Autonomous Weapon Systems: Technical, Military, Legal and Humanitarian Aspects* (2019); United Nations Office for Disarmament Affairs, *CCW GGE LAWS Reports*, 2023

[5] Paul Scharre, *Op. cit.*, p. 277, p. 324

meaningful human control concept in governance. Normatively, of course, it is essential. Still, it has been given definitional inflation, with someone who reads a targeting recommendation for 20 seconds qualifying as doing an independent check, while someone who studies it, reads it twice, considers their own options, and secures agreement from others does not. The following mechanisms offer a more precise regulatory agenda.

Mandatory Algorithmic Auditability Standards*:* Pre-deployment and ongoing auditability requirements should apply to any targeting system used during armed conflict that AI assists. The decision-making logic in the system, including training data, weighting rules, error margins, and output thresholds, must be interpretable and documented by a qualified and independent auditor. This is not only possible but has been done in civilian AI regulation: the European Union's Artificial Intelligence Act requires high-risk AI systems to maintain comprehensive technical documentation and to provide opportunities for human oversight throughout the system's lifecycle. If the same standard were applied to military AI, a state using AI would have to keep logs of the algorithm sufficient to allow post-incident compliance with IHL to be reviewed. Meanwhile, language on traceability and explainability has been added to the rolling text of the CCW Group of Governmental Experts for November 2024, in which auditability is beginning to secure a foothold in multilateral discussions.[1] This study supports this approach and suggests that this should be strengthened to a legally binding commitment in any future binding document.

Disaggregated Liability Attribution Frameworks: There are two aspects to the accountability gap: doctrinal and institutional. Under the current command responsibility doctrine, a superior is held liable for crimes committed by subordinates if the superior knew or should have known of the crime and failed to prevent or punish the perpetrators, as stipulated in Article 28 of the Rome Statute. The issue with algorithmic targeting is that there are several actors between the data, the algorithm's training, its deployment, and the civilian harm it causes. For this entire chain, Bo et al. have suggested a framework for traceability based on responsibility for IHL throughout the chain, not just at the end, where the final strike is delivered[2]. This study supports this and urges its incorporation into domestic military law, as well as into the draft of a legally binding instrument on Lethal Autonomous Weapons Systems (LAWS). Specifically, there should be a requirement for states to prepare a liability attribution map documenting who is responsible for each decision node in the algorithmic targeting cycle before it is deployed.

Minimum Verification Time and Human Oversight Protocols: Perhaps the most tractable reform is the procedural conditions of human review. The documented 20-second review windows and the gender-confirmation verification task, which is usually the primary verification task, constitute a de facto displacement of the precautionary duty, even when humans nominally are in the loop. There should be a minimum number of steps in the process of reviewing AI-generated target recommendations, such as a minimum review time, independent verification of the data used to generate the target, consultation with legal advisors if the AI is likely to result in significant civilian casualties, mandatory documentation of the proportionality assessment undertaken, and so on. This is a way to operationalize the Convention on Certain Conventional Weapons (CCW) rolling text's context-appropriate

[1] Benjamin Perrin, *Lethal Autonomous Weapons Systems & International Law: Growing Momentum Towards a New International Treaty*, "Insights", Vol. 29, No. 1, 2025, pp. 1-8, https://asil.org/wp-content/uploads/2025/10/ASIL_Insights_2025_V29_I1.pdf (21.03.2026)

[2] Marta Bo, Laura Bruun, Vincent Boulanin, *Retaining Human Responsibility in the Development and Use of Autonomous Weapon Systems: On Accountability for Violations of International Humanitarian Law Involving AWS*, "Stockholm International Peace Research Institute", 2022. https://doi.org/10.55163/AHBC1664

human oversight, particularly in morally and legally significant decisions, such as identification and/or engagement of targets. [1] It is also directly responsive to the mechanistic and compressed review process, identified as a key structural weakness in Gaza, which is the focus of this study.

All three mechanisms are individually insufficient. They complement each other and are essential elements of a governance structure appropriate to algorithmic warfare. Their incorporation into a legally binding document, which now has significant international momentum after a UNGA resolution on 62nd Dec 2024 passed by a UN vote of 166 countries[2], is the least regulatory response that Gaza's experience demands.

Rethinking IHL in AI-Mediated Conflict

The application of the principles of distinction, proportionality, and precaution is increasingly mediated by systems that priorities scale, speed, and pattern recognition, highlighting a widening gap between international humanitarian law and the operational realities of AI-assisted warfare. In such environments, digital dehumanization emerges as an operational by-product of processes that reduce individuals to probabilistic profiles. As Scharre observed, the growing reliance on machine-generated outputs can tilt human judgment toward system recommendations, subtly recalibrating perceptions of acceptable risk in the use of force.[3] When combined with large-scale data processing and compressed decision timelines, this shift raises the possibility that legal protections for civilians may be progressively eroded in practice, even if they remain intact in principle. The inadequacy of existing IHL frameworks in the context of AI-assisted targeting is demonstrable through a close reading of how each of the three cardinal principles operates under conditions of algorithmic mediation.

The Principle of Distinction: Customary IHL and Article 48 of Additional Protocol I require that parties to an armed conflict distinguish at all times between civilians and combatants, as well as between civilian objects and military objectives. This obligation implies that a person's status is to be determined individually and in context when making decisions about attacks. What the Gaza case reveals is that targeting systems based on algorithms failed to replace individualized assessment with probabilistic approximations based on behavioral proxies such as shared communication metadata, social network connections, and digital infrastructure. This is not only a legal issue of the unreliability of such a proxy, but it was also evident that it was. It is because IHL's distinction obligation is, by design, a qualitative judgment that assumes human ability to make contextual inferences, something a machine learning model trained on aggregate data patterns is not able to do. In situations of asymmetric warfare in urban areas, protected civilian status is something that can only be judged by human assessment, which is often contextual and intuitive, and is not a field that algorithms excel at. [4] The sheer scale of Lavender's classification exercise, which designated some 37,000 people as suspected militants within weeks, is a sign of the move away from individual judgment that is required[5]. Such a volume of a model is required to be

[1] Benjamin Perrin, *Op. cit.*, p. 5
[2] Human Rights Watch, *Killer Robots: UN Vote Should Spur Treaty Negotiations,* HRW, New York, 2024, pp. 1-3, https://www.hrw.org/news/2024/12/05/killer-robots-un-vote-should-spur-treaty-negotiations (21.03.2026)
[3] Paul Scharre, *Op. cit.*, p. 98, 146, p. 279
4 International Committee of the Red Cross, *Autonomous weapon systems and international humanitarian law,* March 2026, https://www.icrc.org/sites/default/files/2026-03/4896_002_Autonomous_Weapons_Systems_-_IHL-ICRC.pdf (21.03.2026)
[5] Yuval Abraham, *Op. cit.*, p. 3

pattern-matching, and not assessing. Thus, it is a mismatch between the technology and what IHL needs.

The Principle of Proportionality*:* The proportionality rule, codified in Additional Protocol I - Article 51(5)(b), stipulates that attacks that are likely to cause civilian injury that is excessive in relation to the specific and direct military advantage to be gained are prohibited. The assessment is very much prospective and comparative: weighing incommensurable values - expected civilian casualties versus expected military gains - to make a decision. This includes a type of thinking that combines legal, military, and moral reasoning in real time. [1] This is not the kind of reasoning performed by an AI-assisted targeting system. They make recommendations based on pattern recognition and risk thresholds. Reported collateral damage limits, allowing up to 15 civilian casualties for top Hamas officials, and fewer for lower-ranking members of the organization[2], were not the result of the use of true proportionality analysis in the Gaza context. They were predefined parameters programmed into the algorithms, which were then used to operationalize them at scale. The legal impact is important because a pre-formulated collateral threshold, imposed in the same manner against all algorithmically generated targets, is not a proportionality exercise but an alternative to one. The human command decision-making process under IHL has already been replaced by an algorithm that determines acceptable casualty ratios before any human commander is consulted[3].

The Principle of Precaution: In accordance with Articles 57 and 58 of Additional Protocol I, parties must take all practicable measures to ensure that the target of an attack is a legitimate military objective, to select means and methods which minimize incidental civilian injury and damage, and to cease or suspend an attack if it becomes evident that it will cause civilian suffering that is clearly disproportionate to the direct military advantage[4]. The duty of precaution is thus the duty of active inquiry, as commanders must ask whether their intelligence is valid and whether their targets are legitimate and therefore worthy of attack. The 20-second period in Gaza operations, during which all names were documented, and the delegation of gender confirmation as the main verification task[5], are not consistent with any sensible interpretation of the precautionary obligation. The doctrine of an accepted error margin in the classification of algorithms is the reverse of the error as a trigger for further examination.

These observations, when taken together, help to make sense of the claim of structural inadequacy. The issue isn't that IHL principles aren't applicable; distinction, proportionality, and precaution apply to everyone, including those using artificial intelligence systems. The structural issue is the conditions under which algorithmic targeting is employed, such as the statistical classification of large populations, tight decision timelines, institutionalized error tolerances, and automation biases, all of which undermine the cognitive and institutional practices needed to uphold these principles meaningfully. Bruun et al. acknowledge that IHL compliance should not ignore the human element of the conduct-of-hostilities rules, which

[1] Laura Bruun, Marta Bo, Netta Goussac, *Compliance with international humanitarian law in the development and use of autonomous weapon*, "Stockholm International Peace Research Institute", 2023, https://www.sipri.org/sites/default/files/2023-03/ihl_and_aws.pdf (21.03.2026)
[2] Yuval Abraham, *Op. cit.*, p. 2
[3] Gerald Mako, *Legal accountability for AI-driven autonomous weapons*, March 9, 2026, https://lieber.westpoint.edu/legal-accountability-ai-driven-autonomous-weapons/ (21.03.2026)
[4] Laura Bruun, Marta Bo, Netta Goussac, *Op cit*., p. 28
[5] Yuval Abraham, *Op. cit.*, p. 3.

remain the foundation for IHL[1]. The Gaza experience shows just the opposite: the operational structure of targeting with the help of AI did the opposite. For this reason, the governance of military artificial intelligence must rest on a reaffirmation of meaningful human control. Legal frameworks must tighten oversight standards, verification, and attribution. Without such reforms, the integration of AI into targeting processes risks entrenching a model of warfare in which technological capability outpaces law's capacity to regulate its consequences.

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[1] *Idem*

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RELIGIOSITY AND RADICAL SECULARISM: FAITH, NON-BELIEF, AND THE DYNAMICS OF HATRED IN CONTEMPORARY POLITICAL EXTREMISM

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Abstract

This article examines how religiosity and radical secularism shape the identities and practices of contemporary political extremism, and how the sacred–profane dichotomy fuels mutual hatred between the far right and the far left. Drawing on a critical synthesis of institutional reports (Europol, ISD), comparative academic analyses (Haynes; Jasko et al.; START), and research documents on major attacks (Program on Extremism), the text offers an interdisciplinary approach, sociological, political, and security-oriented, to explain why and how faith (or its repudiation) becomes a driver of violent or symbolic mobilization. We identify key mechanisms: the instrumentalization of religion as a moral and identity-based foundation by the radical right; the transformation of ideology into a "secular religion" on the radical left; the amplification of antagonism through digital ecosystems; and the spiral effect of reciprocal legitimization of violence.

Based on these findings, the introduction identifies early warning signs of risk, such as the normalization of "replacement" narratives, the migration of extremist discourse to alt-tech platforms, and the territorialization of protests, and outlines directions for further analysis (scenarios for 2025-2030, preventive measures). The study provides researchers and policymakers with a framework for understanding how differing relationships to the sacred and the profane contribute to vulnerabilities in security and democratic cohesion, emphasizing the need for integrated strategies, political, educational, and digital, that address both ideological components and the media through which they are transmitted.

Keywords: religiosity; secularism; extremism; political, ideology; hatred

Introduction

Contemporary political polarization has acquired a dimension that goes beyond economic or institutional disputes: the confrontation between the far right and the far left has gradually transformed into a conflict of an axiological and even ontological nature, in which the relationship to the sacred (religion, tradition) and the profane (militant secularism, critique of religion) becomes a central component of political identity. This religiosity, no religiosity dimension is not a rhetorical accessory; it structures the frameworks through which collective action is justified, motivates mobilization, and, under certain conditions, legitimizes violence. The present approach starts from the premise that differentiation in relation to the sacred, whether through an appeal to faith or through its rejection, is a key driver of mutual hatred between the extremes and, as such, a critical variable for understanding short- and medium-term security risks. The central argument we advance is threefold: (1) The contemporary far right often exploits religious resources (symbols, narratives of civilizational roots, appeals to "Christian values") to construct a moral

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foundation that justifies exclusion; (2) The radical far left, typically secularist, transforms ideology into a sacral substitute, with dogmas, collective rituals, and emblematic figures, such that the rejection of religion becomes a sacred principle in itself; (3) This symmetry (sacred for some vs. sacred for others) fuels mutual hatred, turning political events into flashpoints for symbolic confrontation and, in extreme cases, physical violence. These claims are supported through a synthesis of existing literature and reference to recent empirical data from security reports and case studies.

Recent data and evidence confirm both the complexity and relevance of this thesis. The ISD report on the "Great Replacement" documents how the conspiracy theory has been normalized in public discourse and used as a declared motivation in lethal attacks (for example, Christchurch, 2019), a striking example of how identity narratives and the "defense of values" become justifications for extreme violence.[1] Europol, in its TE-SAT 2021 report, shows that violent threats within the EU are becoming increasingly diverse: alongside jihadist attacks, forms of political violence attributed to both the far right and the far left/anarchist movements persist, while attacks on symbols, including places of worship, remain a form of protest with a high potential for escalation[2]. Comparative research (for example, the START/UMD analysis and PNAS studies) provides quantitative context regarding the frequency and nature of violence committed by actors with different ideological orientations, showing that while the types of violence and targeted objectives tend to differ, no ideological camp is inherently protected from escalation[3].

In theoretical terms, the interpretation of the data can be situated within a Durkheimian framework and contemporary studies of public religion: Durkheim demonstrated that the sacralization of symbols creates social bonds and legitimizes cohesion[4]. Applied to the political context, this theory explains how religion, or, in its absence, ideology (with sacred functions), becomes an instrument for building the cohesion of the extremist group. Casanova and others have insightfully discussed the ways in which religion re-enters public life as a political resource, a phenomenon exploited by populist and radical actors[5]. Complementarily, Hervieu-Léger and Durkheim suggest that in the absence of a traditional religion, "chains of memory", ideological and ritual in nature, can emerge, taking over religious functions in secular forms[6]. The mechanisms through which religiosity and radical secularism generate and amplify mutual hatred are manifold. First and foremost, there is the instrumentalization of narratives: right-wing rhetoric often evokes apocalyptic imagery of

[1] Jacob Davey, Julia Ebner, *The 'Great Replacement': The Violent Consequences of Mainstreamed Extremism*, Institute for Strategic Dialogue (ISD), 2019, PDF, (see pp. 6–8 for the discussion concerning Christchurch and the normalization of narratives), https://www.isdglobal.org/wp-content/uploads/2019/07/The-Great-Replacement-The-Violent-Consequences-of-Mainstreamed-Extremism-by-ISD.pdf (07.10.2025)

[2] Europol, *European Union Terrorism Situation and Trend Report (TE-SAT) 2021*, European Union Agency for Law Enforcement Cooperation, PDF, 2021, pp. 34–41, https://www.europol.europa.eu/cms/sites/default/files/documents/tesat_2021_0.pdf (07.10.2025)

[3] Katarzyna Jasko, Gary LaFree, James Piazza, Michael H. Becker, *A comparison of political violence by left-wing, right-wing and Islamist extremists in the United States and the world*, Proceedings of the National Academy of Sciences (PNAS), (comparative analysis), "Psychological and Cognitive Sciences", Vol. 119, No. 30, July 18, 2022, https://www.pnas.org/doi/10.1073/pnas.2122593119 (07.10.2025)

START (National Consortium for the Study of Terrorism and Responses to Terrorism)/University of Maryland, *Political Violence Across Ideological Categories*, 2022, https://www.start.umd.edu/events/political-violence-across-ideological-categories (07.10.2025)

[4] Émile Durkheim, *The Elementary Forms of Religious Life*, Free Press, New York, 1995 (1912), pp. 221-222

[5] José Casanova, *Public Religions in the Modern World*, University of Chicago Press, Chicago, 1994, pp. 3-5

[6] Danièle Hervieu-Léger, *Religion as a Chain of Memory*, Rutgers University Press, New Brunswick, NJ, 2000, pp. 3-5; Émile Durkheim, *Op. cit.*, pp. 77, 205

decline (such as the "replacement" of native populations or the loss of "Christian values"), while the radical left employs discourses of liberation, anti-patriarchy, and the "illegitimate" dismantling of religious institutions[1]. These narratives do not coexist passively; they are mediated and amplified by informational ecosystems, mainstream platforms, alt-tech networks, and the "dark social" sphere, where content becomes trapped within echo chambers.[2] Secondly, there is the sacralization of political practices: demonstrations, marches, and counter-protests acquire ritualistic features. For left-wing groups, marches and urban occupations can function as rituals of iconic communion;[3] for right-wing groups, "tradition-preserving" gatherings and religious invocations acquire a sacramental significance, transforming political protest into a "mission"[4]. These dynamic narrows the space for negotiation: what is deemed "sacred" cannot be negotiated, compromise becomes betrayal, and rational dialogue is replaced by emotional mobilization. Thirdly, there is the "beauty-and-beast" feedback loop: the symbolic or violent actions of one side are used by the other to justify retaliatory measures, for instance, attacks on religious sites may fuel persecution narratives, which in turn provoke violent responses from the self-proclaimed "defenders of values"[5]. The result is an escalatory spiral that transforms local conflicts into incidents with national or transnational implications. Another critical vector concerns institutional infiltration and state legitimacy. Studies on Christian nationalism in the U.S. show how identity-based religious rhetoric can generate support for policies that erode trust in institutions[6], in other political contexts (the U.S., Sweden, Norway, Finland, Poland, Germany, Russia), the ideological alignment between power and religion diminishes the space for democratic opposition.[7] On the left, radical movements may perceive the state as an

[1] Jacob Davey, Julia Ebner, *Op. cit.*, pp. 4–8; Jeffrey Haynes, *Right-Wing Populism and Religion in Europe and the USA*, "Religions", 2020, Vol. 11, No. 10, Art. 490, 2020, pp. 4-7, https://doi.org/10.3390/rel11100490

[2] Jacob Davey, Julia Ebner, *Op. cit.*, pp. 24-28; Samantha Walther, Andrew McCoy, *US Extremism on Telegram: Fueling Disinformation, Conspiracy Theories, and Accelerationism*, in Perspectives on Terrorism, Vol. 15, No. 2, April 2021, ICCT research (research on the migration of extremist content toward alt-tech platforms), pp. 100-101

[3] Danièle Hervieu-Léger, *Op. cit.*, pp. 85-91

[4] Steve Bruce, *Fundamentalism*, Polity Press, Malden, MA, Cambridge, UK, 2008, p. 66; pp. 96-98

[5] Europol, *European Union Terrorism Situation and Trend Report (TE-SAT) 2021*, pp. 41-46; Alexander Meleagrou-Hitchens, Moustafa Ayad, *The Age of Incoherence? Understanding Mixed and Unclear Ideology Extremism*, Program on Extremism/National Counterterrorism, Innovation, Technology, and Education Center – US Department of Homeland Security-Centre of Excellence, June 2023, p. 8; p. 11, p. 29, https://extremism.gwu.edu/sites/g/files/zaxdzs5746/files/2023-06/the-age-of-incoherence-final.pdf (21.02.2026)

[6] Andrew L. Whitehead, Samuel L. Perry, *Taking America Back for God: Christian Nationalism in the United States*, Oxford University Press, Oxford, 2022, pp. 18-19; Iulian Dinulescu, *Motivation of Qanon Conspiracy Theories Appropriation by Christians and the Expansion of the Phenomenon in 2022*, "Strategic Impact", No. 2/2022, "Carol I" National Defence University Publishing House Bucharest, Romania, pp. 72-84; Iulian Dinulescu, *Religion and Politics in the Context of the 6 January 2021 Assault on the US Congress*, "Strategic Impact", No. 2/79, 2021, "Carol I" National Defence University Publishing House Bucharest, Romania, pp. 78-92; Iulian Dinulescu, *The Interference of the Far-Right Ideology Qanon with Christianity*, "Strategic Impact", No. 1/78, 2021, "Carol I" National Defence University Publishing House Bucharest, Romania, pp. 118-134

[7] Anna Maria Grzymała-Busse, *Nations under God: How Churches Use Moral Authority to Influence Policy*, Princeton University Press, Princeton, 2015, pp. 3-25; Zoe Knox, *Russian Orthodoxy, Russian Nationalism, and Patriarch Aleksei II*, "Nationalities Papers", Vol. 33, No. 4, 2005, pp. 533-545, https://figshare.le.ac.uk/articles/journal_contribution/Russian_Orthodoxy_Russian_Nationalism_and_Patriarch_Aleksii_II/10078862 (24.04.2026); Iulian Dinulescu, *The Risks to Germany's Peace and Security Generated by The Reichsbürger Movement or "Citizens Of The Reich" Based on Political and Religious Convictions*, "Romanian Military Thinking", No. 4, 2023, pp. 138-149; Iulian Dinulescu, *The Risks to Society Generated by "Sovereign Citizens" Based on the Attitude Influenced by Religious Beliefs*, "Studia Securitatis", No. 2, 2023, pp. 62-72; Iulian Dinulescu, *Between the Sacred and the Violent: The Russian Imperial Movement and the New*

instrument of oppression and employ direct action as a means of subversion a strategy that, when combined with economic or social crises, creates a context conducive to escalation[1]. In short, the factors that make this dynamic particularly dangerous over the next five years are: (a) the normalization of transnational conspiratorial narratives (e.g., the "Great Replacement"); (b) the migration of extremist content to less-moderated platforms (alt-tech, Telegram, dark social), where it is difficult to detect and counter; (c) the intersection of crises (economic, climate, migration) that amplify grievances; and (d) the erosion of institutional trust, which undermines the effectiveness of legal and social responses[2].

This introduction provides the conceptual framework and basic empirical evidence necessary for the subsequent chapters: (I) Religion as a resource for right-wing mobilization; (II) Radical secularism as the "political religion" of the left; (III) The dynamics of mutual hatred (sacred–profane); and (IV) Implications for internal security, including scenarios and practical recommendations for 2025-2030. In what follows, each component will be examined in detail, with references to case studies, statistical data, and proposals for public policy, community-based prevention, and the regulation of digital ecosystems.

Religion and the Far Right: Moral Foundation and Exclusion

Religion, particularly in its institutional or civilizational forms, has consistently been used by far-right movements to construct a moral framework justifying exclusion. Within the logic of these movements, nation, faith, and social order are perceived as inseparable, and the defence of religious identity becomes a sacred mission. Haynes notes that the rise of right-wing populism in Europe and the U.S. is inseparable from the revalorization of religion as a tool of collective identity, a form of "religious nationalism" in which Christianity functions more as a "cultural symbol" than as a doctrinal system[3]. This type of sacralization of national identity produces an effect of moral exclusion. Minority groups, migrants, or secular individuals are portrayed as threats to an order considered divine or natural. As Bruce notes, "religion provides a transcendent justification for hierarchy and difference"[4]. Within this framework, symbolic violence (discourses, exclusionary policies) becomes a form of social purification.

The phenomenon known as "Christian Nationalism" has become a cornerstone of the American radical right discourse, but it has clear analogues in Central and Eastern Europe. Whitehead and Perry argue that Christian nationalism does not represent merely "a set of religious beliefs" but "an ideology" that fuses "Christianity" with "national identity" and with a sense of "legitimate possession" over "public space"[5]. Robert P. Jones's analysis of the events on January 6, 2021, the attack on the U.S. Capitol, highlights the role that religious symbols and rhetoric played in legitimizing extremist actions. Protesters employed crosses, Bibles, banners with Christian messages, and Bible-inspired rituals (such as the "Jericho" marches) to impart spiritual meaning to their political endeavour. Jones emphasizes that these

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Paradigm of Terrorism, "Studia Securitatis", No. 2, 2024, pp. 68-77; Iulian Dinulescu, *The Nordic Resistance Movement as a Threat to European and International Security,* "Romanian Military Thinking", No. 4, 2024, pp. 380-397

[1] Katarzyna Jasko, Gary LaFree, James Piazza, Michael H. Becker, *Op. cit.*, p. 2

[2] Jacob Davey, Julia Ebner, *Op. cit*, pp. 6-7; Europol, *European Union Terrorism Situation and Trend Report (TE-SAT) 2021*, pp. 7-12; Samantha Walther, Andrew McCoy, *Op. cit.*, pp. 100-124

[3] Jeffrey Haynes, *Op. cit.*, p. 3

[4] Steve Bruce, *Secularization: In defence of an unfashionable theory*, Oxford University Press, Oxford; New York, 2011, p. 103

[5] Andrew L. Whitehead, Samuel L. Perry, *Op. cit.*, p. 17

symbols were not mere expressions of faith but identity and ideological tools, through which white Christianity intersected with nationalism and exclusion. The article warns of the risk that the sacralization of political discourse may normalize violence and strengthen the links between religion and radical far-right movements[1]. In Europe as well, similar forms of religious revalorization can be observed in phenomena where authority is sacralised. Grzymała-Busse shows that in these contexts, religion provides not only legitimacy but also an organizational infrastructure for the dissemination of conservative messages[2].

This type of politicized religiosity becomes more visible during periods of identity crisis, migration, pandemic, war, when the boundary between faith and ideology blurs. As Casanova observes, religion reemerges in the public sphere not because it becomes more devout, but because it is instrumentalized in the struggle to define public morality[3]. An important dimension of contemporary right-wing radicalization is apocalyptic rhetoric, built on the idea that Christian Europe is threatened by the "replacement" of the native population. This conspiratorial theory, popularized by Renaud Camus and adopted by groups such as Generation Identity, claims that Muslim migration and declining European birth rates will lead to the disappearance of Christian civilization[4]. This vision is not merely a marginal idea: the 2019 ISD report shows that "Great Replacement" narratives have been frequently adopted by mainstream political leaders and publicized without critique, facilitating the normalization of identity-based hatred[5]. Since 2019, European security institutions have been warning about the visible rise of far-right activism, considered one of the most significant emerging threats to the internal stability of Western states. Nationalist radicalization, articulated through messages of cultural purification and the rejection of democratic values, has increasingly manifested in violent actions. Cases in the United Kingdom have often been cited as examples of the transformation of this ideology into a transnational phenomenon, fuelled by online networks and moralizing rhetoric concerning identity and sovereignty[6].

The analysis by the International Centre for Counter-Terrorism (ICCT) highlights that the manifesto of the Buffalo attacker combines the "Great Replacement" theory with elements of antisemitism and militant racism, constructing a narrative of defending "white identity" against an alleged global conspiracy. The text employs symbols and viral imagery to disseminate extremist ideology and encourage imitation. In a complementary perspective, sociologists Samuel Perry and Philip Gorski emphasize that white Christian nationalism functions as an exclusivist political theology: freedom is reserved for the similar, order is imposed on others, and violence becomes justified in the name of a sacred mission to "restore" the cultural and moral fabric of the nation[7]. In Juergensmeyer's terms, this

[1] Robert P. Jones, *Facing White Christianity's Role in the January 6th Insurrection*, in Religion Dispatches, January 4, 2022, https://religiondispatches.org/facing-white-christianitys-role-in-the-january-6th-insurrection/ (08.10.2025)
[2] Anna Maria Grzymała-Busse, *Op. cit.*, p. 193
[3] José Casanova, *Public religions in the modern world*, University of Chicago Press, Chicago, 1994, pp. 4-5, 216-221
[4] Jacob Davey, Julia Ebner, *Op. cit.*, pp. 6–8
[5] *Ibidem*, pp. 9-10
[6] Iulian Dinulescu, *Fanatismul religios legionar: de la apariția în România la promovarea de către extrema dreaptă din Statele Unite ale Americii*, Top Form, București, 2020, p. 11
[7] Tahir Abbas, Inés Bolaños Somoano, Joana Cook, Isabelle Frens, Graig R. Klein, Richard McNeil-Willson, *The Buffalo Attack: An Analysis of the Manifesto*, The Hague: International Centre for Counter-Terrorism, 2022, https://icct.nl/publication/buffalo-attack-analysis-manifesto, (08.10.2025); Samuel L. Perry, Philip S. Gorski, *With the Buffalo Massacre, White Christian Nationalism Strikes Again*, The Washington Post, May 20, 2022, https://www.washingtonpost.com/outlook/2022/05/20/white-christian-nationalism-buffalo-abortion/ (08.10.2025)

represents a "theology of hate", a reinterpretation of political conflict as a cosmic battle between good and evil, between purity and decay[1]. When morality is defined in cosmic terms, the opposition becomes demonized, and compromise becomes impossible.

In the digital age, religious space moves online, and extremism follows. Recent studies by the International Centre for Counter-Terrorism (ICCT) show that Telegram, Gab, and other "alt-tech" platforms function as radicalization ecosystems where religious discourse is remixed with conspiratorial theories and pseudo-theological narratives[2]. In these spaces, religion is reduced to aesthetics and visual identity, stylized crosses, out-of-context Bible quotes, images of medieval knights, used to create a sense of a "sacred community"[3]. Jaskó et al. show, in a comparative study, that far-right groups use religious symbols three times more frequently than left-wing groups[4]. This symbolic oversaturation builds a form of moral solidarity that legitimizes even violent actions.

However, digital radicalization is not a unilateral process. Europol observes that right-wing radicals adopt decentralized, non-hierarchical structures similar to those of anarchist groups, complicating security interventions[5]. At the same time, "religious influencers" in these spaces act as alternative moral authorities, replacing traditional religious institutions[6]. In Eastern Europe, the relationship between religion and the far right has distinct characteristics. In Russia, the Orthodox Church plays a central role in legitimizing imperial discourse and the cultural war[7]. Knox describes how, after 2000, the Russian Orthodox Church was reintegrated into the state project as a source of national identity and morality.[8] Within this logic, opponents are seen not only as "traitors" but also as "sinners," and political struggle becomes a moral crusade. In Poland, the phenomenon of political Catholicism is documented by Grzymała-Busse, who shows how political organizations have used religious symbols to justify anti-LGBT and anti-migration policies, described as "protecting the Christian family"[9]. In both cases, religion no longer functions as a space for reconciliation, but as a front line.

In Romania, recent research shows similar trends: the "Christian-patriotic" discourse has become a rhetorical reference point in anti-COVID-19 restriction mobilizations and anti-minority campaigns. Although physical violence is rare, symbolic violence, hate speech, stigmatization, is increasingly frequent[10]. On a psychological level, religion provides

[1] Mark Juergensmeyer, *Terror in the Mind of God: The Global Rise of Religious Violence*, 4th Ed. University of California Press, Oakland, 2017, pp. 24-28
[2] Samantha Walther, Andrew McCoy, *Op. cit.*, pp. 100, pp. 114-117
[3] Iulian Dinulescu, *Religion and Politics in the Context of the 6 January 2021 Assault on the US Congress*, "Strategic Impact", No. 2/79, 2021, "Carol I" National Defence University Publishing House Bucharest, Romania, pp. 83-86
[4] Katarzyna Jasko, Gary LaFree, James Piazza, Michael H. Becker, *Op. cit.*, pp. 1-4
[5] Europol, *European Union Terrorism Situation and Trend Report (TE-SAT) 2021*, pp. 18–19, pp. 81-82, p. 95
[6] Steve Bruce, *Secularization: In defence of an unfashionable theory*, pp. 9, 28-30, 48, 88, 175; Iulian Dinulescu, *Motivation of Qanon Conspiracy Theories Appropriation by Christians and the Expansion of the Phenomenon in 2022*, "Strategic Impact", No. 2, 2022, "Carol I" National Defence University Publishing House Bucharest, Romania, pp. 72-84; Iulian Dinulescu, *The Interference of the Far-Right Ideology Qanon with Christianity*, in "Strategic Impact", No. 1/78, 2021, "Carol I" National Defence University Publishing House Bucharest, Romania, pp. 118-134
[7] Iulian Dinulescu, *Between the Sacred and the Violent: The Russian Imperial Movement and the New Paradigm of Terrorism*, Studia Securitatis. No. 2, December 2024, p. 70
[8] Zoe Knox, *Op. cit.* pp. 533-545
[9] Anna Maria Grzymała-Busse, *Op. cit.*, p. 185, p. 192, p. 223, p. 235
[10] Friedrich Naumann Foundation for Freedom, *Illiberal discourse in Romania: the year of exception 2020*, https://www.freiheit.org/romania-and-republic-moldova/illiberal-discourse-romania-year-exception-2020,

frameworks of meaning and intuitive moral foundations, which can be diverted to justify exclusion. Haidt shows that morality based on loyalty, authority, and purity (as opposed to morality based on liberty and equality) correlates significantly with conservative orientations[1]. When these foundations become absolute, moral difference becomes ontological difference.

Thus, in religious right-wing extremism, exclusion becomes an act of purification, and hatred becomes an expression of virtue. This is a phenomenon described by Arendt in terms of "totalitarian morality", a system in which good is no longer debatable but imposed. In this logic, hate speech is not perceived as violence, but as a "painful truth" necessary for collective salvation[2].

Religion, in its own instrumentalized form, provides the far right with moral legitimacy, collective identity, and a framework for mobilization. It simultaneously becomes a source of solidarity and a justification for exclusion. In the context of a world perceived as chaotic and corrupt, the appeal to the sacred offers meaning and order, even if the cost is the delegitimization of the other. This sacralization of identity creates the ground for what we will analyse in the next chapter, the reverse transformation: how radical secularism and anti-religion can themselves become secular religions, with their own dogmas and rituals, producing a dangerous symmetry in the dynamics of contemporary hatred.

Radical Secularism and the Far Left: Ideology as a Secular Religion

If the far right legitimizes itself through the sacralization of religious identity, the contemporary far left defines itself through a sacralization of reason, progress, and social justice. In both cases, we are dealing with forms of moral absolutism, but the direction is reversed: instead of God, the far left elevates "humanity" or "equality" to the status of transcendent principles.[3] This dynamic was described as early as the 20th century by Eric Voegelin, who defined communism and other totalizing ideologies as "political religions", secular systems of salvation that promise the rebirth of society through the sacrifice of the present.[4] In the postmodern world, this form of godless belief manifests in other ways: absolutist activism, cancel culture, and the demonization of any ideological dissent.

In contemporary terms, Habermas called this phenomenon "militant post-secularism", a reaction by secularists who, instead of accepting value pluralism, turn rationality itself into an exclusivist dogma.[5] Classical secularism emerged as a reaction to clerical domination and promoted freedom of conscience and the separation of church and state. However, in the 21st century, we are witnessing an ideological shift: from a moderate secularism (which tolerates belief) to a militant secularism, which sees religion as a moral and epistemic obstacle[6].

(10.10.2025); Cristian Barna, Iulian Dinulescu, *Reziliența instituțională la efectele pandemiei în plan societal*, in "Geopolitica", Vol. XIX, No. 86/1, 2021, pp. 135–143

[1] Jonathan Haidt, *The Righteous Mind: Why Good People Are Divided by Politics and Religion*, Pantheon Books, New York, 2012, pp. 176-179

[2] Hannah Arendt, *The Origins of Totalitarianism*, Harcourt, Brace and Co., New York, 1951, pp. 245, pp. 310-312

[3] John Gray, *Black Mass: Apocalyptic Religion and the Death of Utopia*, Farrar, Straus and Giroux, New York, 2007, pp. 26-31, 38

[4] Eric Voegelin, *The New Science of Politics*, University of Chicago Press, Chicago, 1952, pp. 110-112, 175-176

[5] Jürgen Habermas, *Notes on Post-Secular Society*, New Perspectives Quarterly, Volume 25, Issue 4, October 2008, pp. 24-26

[6] Charles Taylor, *A Secular Age*, The Belknap Press of Harvard University Press, Cambridge-Massachusetts and London-England, 2007, pp. 46, pp. 63-64, p. 68, p. 414, p. 434, p. 491, pp. 525-535

Christopher Hitchens (in 2007) and Richard Dawkins (in 2006), through works such as "God Is Not Great"[1] and "The God Delusion"[2], discursively legitimized a form of militant anti-theism, presenting religion as the primary source of violence and social regression. This perspective fueled cultural currents that no longer separate criticism of religion from the stigmatization of the religious, producing a demonization of faith similar, paradoxically, to the demonization of secularists by the religious right[3]. On the political level, this ideology is reflected in neo-Marxist, anarchist, and eco-radical currents, where "salvation" is redefined: it is no longer transcendental but socio-economic, ecological, or moral. Cases such as the Extinction Rebellion movement or the radical segments of liberal, environmentalist, and antifa movements adopt symbolic structures and rituals typical of religion: initiation, collective guilt, and purification through action.[4] Peter Berger describes secularization not as the disappearance of faith, but as a reorientation of the sacred toward other domains: the nation, science, and social justice. In this sense, the radical left transforms politics into social theology, with its own absolute morality and its own dogmas[5].

Durkheim argued that society itself is the object of "religious" worship, and in the contemporary world, this "society" is replaced by "humanity." Thus, theological terms reappear in secular discourse: "conversion" becomes "raising social consciousness," "sin" becomes "privilege," and "salvation" transforms into "universal equality".[6] In academic and activist circles, this new secular religion generates a Manichaean morality: between the "good" (progressives, aware of structural injustices) and the "evil" (conservatives, privileged, or "unwoke")[7]. Thus, criticism becomes heresy, and disagreement-immorality.

Although contemporary radical left publicly distances itself from violence, its history contains numerous episodes of "salvific violence".[8] In his view, the destruction of the existing order is a condition for rebirth, an idea echoed by Žižek, who stated that "Stalinist communists 'without God' are the ultimate proof of this: everything was permitted to them, as they perceived themselves as direct instruments of their divinity, of the Historical Necessity of Progress toward Communism".[9] This logic justifies symbolic and cultural aggressiveness, cancel culture, the marginalization of conservatives or believers, as acts of "moral purification". Online, secular radicals adopt an evangelical tone: calls for "awakening", "public confessions" (self-critical posts), and collective excommunications. As Haidt and Lukianoff note, American academic culture has produced a "moral tribalism", where activism

[1] Christopher Hitchens, *God Is Not Great: How Religion Poisons Everything*, Twelve Books, New York, Boston, 2007
[2] Richard Dawkins, *The God Delusion*, Bantam Press, UK, 2006
[3] Peter L. Berger, *The Many Altars of Modernity: Toward a Paradigm for Religion in a Pluralist Age*, Walter de Gruyter, Inc., Boston, Berlin, 2014, pp. 132-134
[4] José Pedro Zúquete, *Missionary Politics in Contemporary Europe*, Syracuse University Press, Syracuse – New York, 2007, pp. 47-54, 84, 94, 113; José Pedro Zúquete, *Missionary Politics – A Contribution to the Study of Populism*, "Religion Compass", Vol. 7, No. 7, 2013, pp. 263-271; F&A Series: *The Religion of Extinction Rebellion,* Religion in Public, University of Leeds, 2020, https://religioninpublic.leeds.ac.uk/2020/01/23/fa-series-the-religion-of-extinction-rebellion (08.10.2025)
[5] Peter L. Berger, *The Many Op. cit.*, pp. 73-77, pp. 114-120, pp. 126-128
[6] Émile Durkheim, *Op. cit.*, pp. 215, p. 207, pp. 222-227, p. 305, p. 429
[7] Helen Lewis, *How Social Justice Became a New Religion - Our society is becoming less religious. Or is it?*, "The Atlantic", August 18, 2022, https://www.theatlantic.com/ideas/archive/2022/08/social-justice-new-religion/671172 (08.10.2025); Wes Carpenter, *Woke Religion: Unmasking the False Gospel of Social Justice*, Ambassador International, Greenville South-USA and Belfat-Northern Ireland, 2021, pp. 25-30
[8] Hannah Arendt, *On Revolution*, Viking Press, New York, 1963, pp. 42, p. 261
[9] Slavoj Žižek, *Violence: Six Sideways Reflections*, Picador, New York, 2008, p. 136

becomes a ritual of virtue[1]. These dynamics are not merely symbolic. Anarchist or eco-terrorist groups such as the Earth Liberation Front or Animal Liberation Front have justified arson and property destruction in the name of "protecting life", a form of secularized "sacred violence"[2].

The Internet has amplified this form of secular moralism. Pew Research Centre studies show that online activism relies on affective mechanisms similar to religion: belonging, guilt, and moral affirmation.[3] Hashtags become symbols of faith, and algorithms amplify moral outrage, creating an environment of constant purification. Evans and Evans observe that in progressive digital cultures, moral identity is externalized and legitimized through public practices of affirmation, becoming a performative act of recognition. Like religious rituals, the act of virtue signalling becomes a form of penance, and the purification of those deemed guilty, a form of social exorcism[4]. In this sense, radical secularism does not eliminate religion but reincarnates it in other forms, using the same emotional and cognitive structures. As John Gray notes, "secular thought is largely composed of repressed religion"[5], because "contemporary atheism is a continuation of monotheism by other means"[6]. Gray raises the question of whether atheists can truly eliminate the monotheistic residues from their own models of human meaning. His answer is negative: he argues that secular humanism preserves, in a translated form, the theological structure of monotheism, substituting divinity with the idea of a sacralised "humanity." A genuine abolition of theology, Gray asserts, would need to begin by challenging this fundamental belief in the unity and centrality of the human species—a belief that continues to function as a form of secular religion, difficult to abandon even for contemporary atheist thought.[7] Contrary to the Enlightenment ideal of tolerance, radical secular left often adopts a form of symbolic intolerance toward faith. In France, for example, laïcité policies have been reinterpreted in terms of "ideological purity", leading to the banning of religious symbols in schools or in public spaces. Bowen shows that this transformation of *laïcité* has shifted from neutrality to "republican puritanism".[8] In academic settings, recent research shows that religious professors and students avoid expressing their faith for fear of stigmatization. Thus, value pluralism is replaced by moral uniformity.[9] This "dogma of rationality" produces effects similar to religious fundamentalism: rigid moralism, stigmatization, and exclusion. As Hunter concludes, the cultural conflict is not between religion and secularism, but between two forms of absolute morality, one theistic and one humanist[10].

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[1] Greg Lukianoff, Jonathan Haidt, *The Coddling of the American Mind: How Good Intentions and Bad Ideas Are Setting Up a Generation for Failure*, Penguin Press, 2018, pp. 2, pp. 7-11, p. 84, pp. 92-94, p. 101

[2] Stefan H. Leader, Peter Probst, *The Earth Liberation Front and Environmental Terrorism*, "Terrorism and Political Violence", Vol. 15, No. 4, 2003, pp. 37–58

[3] Janna Anderson, Lee Rainie, *The Future of Digital Spacesand Their Role in Democracy*, "Pew Research Center", 2021, p. 3, pp. 7-8, pp. 10-11, https://eloncdn.blob.core.windows.net/eu3/sites/964/2021/11/Future-Social-Media-Democracy-In-2035-Elon-University-Pew-Research-2021.pdf (11.10.2025)

[4] John H. Evans, Michael S. Evans, *Religion and Science: Beyond the Epistemological Conflict Narrative*, "Annual Review of Sociology", Vol. 34, 2008, pp. 87-105

[5] John Gray, *Seven Types of Atheism*, Farrar, Straus and Giroux, New York, 2018, p. 72

[6] *Ibidem*, p. 158

[7] *Ibidem*, p. 157

[8] John R. Bowen, *Why the French Don't Like Headscarves: Islam, the State, and Public Space*, Princeton University Press, Princeton and Oxford, 2007, pp. 3-4, p. 187, p. 274

[9] Baylee A. Edwards, Chloe Bowen, M. Elizabeth Barnes, Sara E. Brownell, *Christian Student Experiences During Peer Interactions in Undergraduate Biology Courses*, "CBE-Life Sciences Education", Vol. 23, No. 1, Art. 7, pp. 1-19, https://www.lifescied.org/doi/epdf/10.1187/cbe.23-01-0020 (11.10.2025)

[10] James Davison Hunter, *Culture Wars: The Struggle to Define America*, Basic Books, New York, 1991, p. 42

Radical secularism and the political left are not merely political movements but contemporary expressions of an anthropological need for the sacred. They redefine salvation, sin, and community in social, rather than transcendent, terms. Like religious extremism, secular radicalism produces exclusion, intolerance, and moralized hatred. In place of God rises Humanity; in place of sin, privilege; in place of hell, inequality. Thus, the confrontation between the religious far-right and the secular far-left is not a conflict between faith and reason, but between two rival moral religions, each claiming a monopoly on the good. This conflictual relationship, analysed in the next chapter "Mutual Hatred and the Sacred–Profane Conflict", will demonstrate how the dichotomy between these two forms of absolutism fuels global radicalization and the ideological violence of the present.

Mutual Hatred and the Sacred–Profane Conflict

The religious far-right and the secular far-left function as mirror images of the same psychological structure: both define the world in terms of absolute good and absolute evil, both demand total loyalty, and both sacralise the struggle against the other. Haidt observes that modern moral polarization is not about rational disagreement, but about the collision of two incompatible moral sacredness's.[1] For the radical right, the sacred is tradition, religion, and the nation; for the radical left, the sacred is equality, liberty, and social justice. In both cases, the profane is the other: the immigrant, the capitalist, the atheist, or the believer. This symmetry produces what Hunter called "culture wars", not mere ideological disputes, but total moral confrontations where no compromise is possible[2].

When values become sacred, conflict becomes impossible to negotiate. Atran and Ginges have empirically shown that individuals who perceive a value as "sacred" refuse any material compromise, even when the cost is high[3]. In contemporary politics, both the far right and the far left transform ideological confrontation into a liturgy of moral purity. Each camp constructs an apocalyptic narrative: the right speaks of the "decay of Christian civilization," while the left warns of the "systemic collapse of patriarchy and capitalism". Gray called these structures "apocalyptic utopias," noting that modernity has secularized the religious apocalypse into political forms: "the final revolution", "the classless society", "the moral rebirth of the nation".[4] Haidt and Fiske & Rai show that political hatred is fueled by intuitive moral mechanisms rather than reasoning. The mutual animosity between the extremes stems from the perception that the other not only errs but also profanes the sacredness of one's own group. For the religious far right, the secular left embodies "decadence," the "destruction of the family," and "moral atheism". For the secular far left, the religious right represents "theocratic fascism", "patriarchal oppression" and "disregard for science"[5]. This mechanism of mutual demonization is a classic process of othering, transforming the adversary into the non-human. Staub observes that "moral genocide" begins with the moral delegitimization of the other, not with physical violence[6].

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[1] Jonathan Haidt, *Op. cit.*, pp. 118, pp. 350-357, p. 364, p. 419
[2] James Davison Hunter, *Op. cit.*, p. 52
[3] Scott Atran, Jeremy Ginges, *Religious and Sacred Imperatives in Human Conflict*, Science, Vol. 336, No. 6083, 2012, p. 855
[4] John Gray, *Black Mass: Apocalyptic Religion and the Death of Utopia*, pp. 30-34
[5] Jonathan Haidt, *Op. cit.*; Alan Page Fiske, Tage Shakti Rai, *Virtuous Violence: Hurting and Killing to Create, Sustain, End, and Honor Social Relationships*, Cambridge University Press, Cambridge, 2015
[6] Ervin Staub, *Overcoming Evil: Genocide, Violent Conflict, and Terrorism*, Oxford University Press, Oxford, New York, 2011, p. 17

The analysis of digital discourse over the past two decades highlights a symmetry in language: both sides use religious terms, but with opposite meanings. As Jakob Schwörer (2024) emphasizes, contemporary political discourse in the digital environment increasingly employs religious references, both in conservative and progressive spaces, transforming ideological confrontation into a moralized symbolic field. From this perspective, both sides reinterpret religious concepts to confer transcendent meaning on their own political causes[1]. In both cases, language becomes a ritual of purification. Words no longer communicate facts but create moral belonging. This dynamic is characteristic of what Berger called "sacralized pluralism", a world in which each group constructs its own complete moral cosmos, impermeable to argument[2].

Digital platforms have become the main catalyst of this confrontation. Bail's studies show that social networks create "moral echo chambers," where users are constantly exposed only to positions that confirm their beliefs, amplifying hatred and contempt toward the opposition[3]. In this context, the reciprocal hatred between the extremes becomes a digital ritual. Outrage, moralizing irony, and symbolic attacks turn into forms of social capital – precisely as Bourdieu described cultural capital[4]. Thus, the sacred–profane conflict no longer occurs only in physical spaces (streets, parliaments) but in the digital realm of performative virtue, where "canceling" and "shaming" become equivalents of religious excommunication[5]. Interestingly, although the extremes perceive themselves as opposites, they share the same logic of moral violence. Juergensmeyer shows that religious and radical secular violence are symmetrical in their justification: both believe that purification can be achieved through destruction[6]. Thus, a far-right attacker invokes the "salvation of the nation", while a violent far-left activist invokes the "liberation of humanity". In both cases, violence becomes sacred, and the death of the opponent, a "moral victory"[7].

This justificatory symmetry has also been documented by Jaskó et al., who showed that both right-wing and left-wing groups justify violence through a "moral obligation", albeit in the name of different values[8]. Extreme polarization operates through mechanisms of reciprocal reaction. Studies by Kalmoe and Mason show that political hatred ("affective polarization") is the strongest predictor of support for violent actions, regardless of ideological orientation[9]. This dynamic manifests as a form of symmetrical radicalization: the right responds to the "woke dictatorship" with calls for a "holy culture war," while the left responds to "religious bigotry" with calls for the "moral purification of society"[10]. Each act of

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[1] Jakob Schwörer, *Religious references in political campaigning: A comparative analysis of Latin America and Western Europe on social media*, "Frontiers in Political Science", Vol. 6, Art. 1470264, 2024, https://doi.org/10.3389/fpos.2024.1470264

[2] Peter L. Berger, *Op. cit.*, pp. 88-90

[3] Chris Bail, *Breaking the Social Media Prism: How to Make Our Platforms Less Polarizing*, Princeton University Press, Princeton & Oxford, 2021, pp. 29-30

[4] Pierre Bourdieu, *The forms of capital*, in J. Richardson (Ed.), "Handbook of Theory and Research for the Sociology of Education", Greenwood Press, New York, 1986, pp. 241–258

[5] Greg Lukianoff, Jonathan Haidt, *Op. cit.*, p. 62, p. 93, p. 172

[6] Mark Juergensmeyer, *Op. cit*, pp. 24-33

[7] *Ibidem*, pp. 4-5, p. 167, p. 205, p. 211, p. 269

[8] Katarzyna Jasko, Gary LaFree, James Piazza, Michael H. Becker, *A comparison of political violence by left-wing, right-wing and Islamist extremists in the United States and the world*, Proceedings of the National Academy of Sciences (PNAS), (comparative analysis), "Psychological and Cognitive Sciences", Vol. 119, No. 30, July 18, 2022, p.1, https://www.pnas.org/doi/10.1073/pnas.2122593119 (07.10.2025)

[9] Nathan P. Kalmoe, Liliana Mason, *Radical American Partisanship: Mapping Violent Hostility, Its Causes, and the Consequences for Democracy*, University of Chicago Press, Chicago and London, 2022, p. 49

[10] *Ibidem*, p. 167

exclusion fuels the next. In the long term, the result is not the hegemony of one side, but the degradation of the shared space of meaning. As Arendt warned, totalitarianism does not begin with state violence, but with the "death of the common space of truth"[1].

Both extremes share a theology of hatred, even if one is religious and the other secular. In both cases, hatred is not a flaw, but a moral virtue: proof of loyalty to the truth. For the right, hatred of "infidels" and "immorals" is an expression of love for God. For the left, hatred of "reactionaries" and "oppressors" is an expression of love for humanity. Thus, hatred becomes a sacred act, in the inverted ethics of extremism, hatred is no longer the opposite of love, but the means through which love for the absolute is affirmed, by negating the profane[2]. In the modern era, evil has been secularized, the place of religious demons has been taken by the moral figures of the "corrupt", the "oppressors", or the "traitors", yet the ritual of collective exorcism, expressed through public condemnation and purification, continues to operate within the same symbolic registers[3].

At the global level, this symmetrical moral polarization creates security vulnerabilities. European strategic analysis services warn that the hybrid violence of ideologically motivated groups (religious right, anarchists, eco-extremists) is becoming increasingly difficult to anticipate, as it is based on absolute moral justifications[4]. In the United States, strategic assessments by the Federal Bureau of Investigation (FBI) and the Department of Homeland Security (DHS) have identified the existence of "domestic violent extremists" (DVE) from both major ideological orientations, right and left, characterized by autonomous network structures, lacking centralized hierarchies, yet interconnected through shared narratives and a sense of moral mission. Federal documents emphasize that these groups mutually reinforce one another, constructing a mistico-political rhetoric that sacralises social conflict and grants violence an absolute moral justification. In both cases, polarized digital environments and fragmented information ecosystems play a crucial role in amplifying the perception of a "total moral war", where the ideological struggle is experienced as an existential battle between good and evil[5]. Thus, the sacred-profane confrontation transcends the cultural sphere and becomes a direct threat to democratic security.

The reciprocal hatred between the religious far right and the secular far left is the contemporary expression of a fundamental anthropological tension: the confrontation between the sacred and the profane. Each camp sacralises its own ideal and profanes the other's. Each sees in the adversary not just an opponent, but a blasphemy. In a globalized and digitalized world, this symmetry is amplified through algorithmic logic, producing radicalization, intolerance, and symbolic violence. As Bauman observes, "liquid modernity" has not dissolved the sacred, it has merely redistributed it across multiple, competing

[1] Hannah Arendt, *The Origins of Totalitarianism*, Brace and Co., New York, 1951, pp. 474-478
[2] Rafał Leśniczak, *Hate speech from the perspective of the mediatization of religion in the post-secular age. A few remarks for discussion*, "Methaodos.revista de ciencias sociales", Vol.11, No. 1, 2023, pp. 1-9, http://dx.doi.org/10.17502/mrcs.v11i1.635
[3] John Gray, *Op. cit.*, pp. 75-91
[4] Europol, *European Union Terrorism Situation and Trend Report (TE-SAT 2024)*, European Union Agency for Law Enforcement Cooperation, The Hague, pp. 7-9, 22, 33-34, 52, https://www.europol.europa.eu/publication-events/main-reports/european-union-terrorism-situation-and-trend-report-2024-eu-te-sat, (14.10.2025)
[5] Federal Bureau of Investigation, Department of Homeland Security, *Strategic Intelligence Assessment and Data on Domestic Terrorism*, May 2021, pp. 2, 5-9, p. 14, https://www.fbi.gov/file-repository/counterterrorism/fbi-dhs-domestic-terrorism-strategic-report.pdf/view (14.10.2025)

spheres[1]. When these sacred values come into conflict, the result is not pluralism, but total moral war. In the following chapter, "Moral Reintegration and the Possibility of Post-Extremist Dialogue", we will examine the possible pathways for depolarization and the reconstruction of a shared moral space, in which religiosity and secularism no longer serve as instruments of hatred, but as resources for social reconciliation.

Moral Reintegration and the Possibility of Post-Extremist Dialogue

After the 20th century, marked by totalizing ideologies, the beginning of the 21st century seems caught in a revival of moral absolutism. The radical right sacralizes tradition and faith, the radical left sacralizes equality and total freedom, and the common space for deliberation collapses between them. Yet, as Habermas warned (as early as 2005), "modernity cannot survive without a reciprocal translation between reason and faith". Habermas formulates the concept of *translation proviso*, asserting that a modern democratic society requires reciprocal translations between the rational-secular language and the religious language in order to maintain civic cohesion[2]. If rationality becomes completely separated from morality, or religion is entirely divorced from pluralism, the result is not freedom, but disintegration. Reason isolated from morality and religion detached from pluralism, Habermas argues, lead to social fragmentation and disintegration, not to liberty. Therefore, post-extremist moral reintegration does not imply relativism, but the reconstruction of a shared framework of meaning, where the plurality of values does not undermine cohesion, but strengthens it. Habermas speaks of moral reintegration within a common framework of meaning, in which the plurality of values is not a threat, but a condition for civic solidarity[3].

Current polarization is not only ideological but also affective and identity-based. McCoy and Somer describe affective polarization as a process in which citizens come to hate one another, perceiving each other not as political rivals, but as existential threats. They define "pernicious polarization" as a process through which society fractures into two opposing camps, between which trust disappears and loyalty to the group becomes absolute[4]. McCoy and Somer argue that, in this way, the affective form of polarization emerges, when citizens no longer perceive others as legitimate opponents, but as moral enemies or existential threats[5]. This dynamic is amplified by algorithms and social networks, where the "moral reward" comes from outrage rather than understanding[6]. Thus, polarization becomes self-sustaining: each expression of hatred generates emotional recurrence and reinforces membership in one's own moral group. As Sunstein (2017) shows, isolated ideological groups tend to become more radical internally, even without contact with the opposition, a phenomenon called "group polarization"[7]. Therefore, depolarization cannot be purely rational; it must also be emotional and moral, capable of restoring trust between communities.

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[1] Zygmunt Bauman, *Culture in a Liquid Modern World*, Polity Press, Cambridge-UK; Malden-MA, 2011, p. 74, pp. 87-88

[2] Jürgen Habermas, *Between Naturalism and Religion: Philosophical Essays*, Polity Press, Cambridge, UK, 2008, pp. 131-133

[3] *Ibidem*, pp. 134-137

[4] Jennifer McCoy, Murat Somer, *Toward a Theory of Pernicious Polarization and How It Harms Democracies: Comparative Evidence and Possible Remedies*, "The Annals of the American Academy of Political and Social Science", Vol. 681, No. 1, 2019, pp. 236–237

[5] *Ibidem*, pp. 238-239

[6] Christopher A. Bail, *Breaking the Social Media Prism: How to Make Our Platforms Less Polarizing*, Princeton University Press, Princeton&Oxford, 2021, pp. 48-49

[7] Cass R. Sunstein, *#Republic: Divided Democracy in the Age of Social Media*, Princeton University Press, Princeton, New Jersey, 2017, pp. 70-71

Habermas proposes the concept of a "post-secular translation", a dialogue between believers and non-believers, in which each side expresses its values in a language intelligible to the other. He discusses what he calls "the post-secular society" and introduces the idea of a reciprocal translation process ("translation proviso" or "post-secular translation"), through which:

- believers must express their religious convictions in a language that is accessible and rational to all citizens;
- secularists (non-believers) must, in turn, show cognitive willingness to understand the rational content of religious arguments[1].

This process does not require abandoning one's convictions, but rather recognizing the limits of one's own horizon. Habermas clarifies that this post-secular dialogue does not demand the relinquishing of religious beliefs or secular convictions, but the acknowledgment of the boundaries of each form of rationality and the necessity of mutual translation to ensure democratic cohesion[2]. Taylor complements this perspective, asserting that the moral pluralism of the modern world cannot be "solved", but only "navigated" through practices of respect and dialogue[3]. In this view, diversity is not a threat but an epistemic resource: each perspective contributes a moral dimension of truth. Moral reintegration, therefore, entails:

1. Redefining sacredness - from an exclusive absolute to a shared sacredness of human dignity[4];
2. Institutionalizing moral dialogue - interreligious, civic, and educational spaces for the translation of values[5];
3. Reflective education - cultivating critical consciousness, empathy, and moral literacy[6].

In the current context of social fragmentation and public trust crises, contemporary literature proposes several models of reconciliation aimed at restoring moral and civic bonds between individuals and communities. Among these, three directions have emerged as major reference points in recent thought:

a) The deliberative model (Habermas, 1996) – in liberal democracies, the public sphere must remain open and rational, but not morally sterile. Habermas argues that deliberative democracy functions only if citizens have moral trust in one another.[7] This entails:

- norms of dialogue based on reciprocity[8];
- understanding the difference between critique and contempt[9];
- institutions that reward collaboration rather than conflict[10].

b) The model of secular compassion (Nussbaum, 2010) – Nussbaum proposes the idea of "secular compassion" – the capacity to recognize another's suffering without necessarily sharing their system of beliefs[11]. This forms the basis of an ethics of common humanity, capable of transcending religious or ideological barriers.

c) The model of "cross-cutting communities". Putnam and Campbell showed that in pluralistic societies, moral stability depends on the existence of "cross-cutting communities",

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[1] Jürgen Habermas, *Between Naturalism and Religion: Philosophical Essays*, pp. 131-132
[2] *Ibidem*, p. 133
[3] Charles Taylor, *Op. cit.*, pp. 303-305
[4] Martha Craven Nussbaum, *Not for Profit: Why Democracy Needs the Humanities,* Princeton University Press, Princeton and Oxford, 2010, pp. 79-94
[5] *Ibidem*, pp. 27-46
[6] *Ibidem*, pp. 95-120
[7] Jürgen Habermas, *Between Facts and Norms: Contributions to a Discourse Theory of Law and Democracy*, MIT Press, Cambridge, Massachusetts, 1996, pp. 272-274
[8] *Ibidem*, pp. 305-307
[9] *Ibidem*, pp. 309-310
[10] *Ibidem*, pp. 488-490
[11] Martha Craven Nussbaum, *Op. cit.*, pp. 37-38, p. 45, pp. 80-83

networks in which individuals from different ideological camps cooperate for shared goals. Such networks reduce stereotypes and rebuild bridging social capital, as opposed to bonding capital, which reinforces exclusion[1]. Together, these perspectives shape a complex framework for contemporary reconciliation, in which deliberative reasoning, moral empathy, and social solidarity become complementary components of the same process of democratic regeneration.

Religion, often perceived as a source of conflict, can become a vector for peacebuilding. Appleby shows that religious traditions contain not only justifications for violence but also internal resources for peace, "the ambivalent potential of the sacred"[2]. Initiatives such as Sant'Egidio (Italy) or Religions for Peace demonstrate that interreligious networks can function as moral infrastructures for reconciliation, bringing together clergy, laity, and secular activists. According to Appleby, Sant'Egidio operates as a "moral infrastructure for reconciliation" through concrete actions in Mozambique, Algeria, and the Balkans,[3] while WCRP (today "Religions for Peace"), including its collaboration with the UN, plays an important role in advancing global interreligious dialogue[4]. Along the same lines, Juergensmeyer argues that only the recognition of the spiritual dimension of conflict allows for the "symbolic deactivation of violence"[5]. Therefore, religion should not be excluded from the public sphere, but translated into a common ethical language accessible even to non-believers. Habermas argues that, in a post-secular democratic society, religion should not be excluded from the public sphere; rather, it must participate in civic dialogue by translating its moral content into a secular language shared by all citizens[6].

On the other hand, secularism should not be understood as anti-religion, but as a framework for pluralistic coexistence. Asad emphasizes that secularism is a specific historical product, not a moral universal, and that it can become oppressive when it absolutizes its own norms[7]. Secularism "arose in modern Euro-America", and although it claims universality, it has a specific historical origin, being the product of a Western political and intellectual tradition.[8] Secularism is not a universal condition of modernity, but a doctrine with particular roots and power effects, capable of becoming oppressive when it presents its norms as neutral and universal[9]. Asad explicitly states that "the concept of 'the secular' today is part of a doctrine called secularism" and that it "builds on a particular conception of the world", meaning it is not based on a universal truth but on a historically situated construction[10].

Therefore, a mature secular culture does not reject the sacred but translates it into values of dignity, freedom, and compassion. Gray suggests that true secularity does not mean the absence of faith, but the awareness of the "plurality of possible beliefs"[11]. According to Gray, "new atheism" and secularism are often confused with the absence of faith[12]. Thus, reflexive secularism becomes a moral space of convergence, not exclusion. Depolarization cannot ignore the digital environment. Online platforms shape moral perceptions, defining who is "sacred" and

[1] Robert D. Putnam, David E. Campbell, *American Grace: How Religion Divides and Unites Us*, Simon&Schuster, New York, 2012, pp. 526-528
[2] R. Scott Appleby, *The Ambivalence of the Sacred: Religion, Violence, and Reconciliation*, Rowman&Littlefield Publishers, Inc., Lanham, Boulder, New York, Oxford, 2000, pp. 29-30
[3] *Ibidem*, pp. 157-164
[4] *Ibidem*, pp. 150-153
[5] Mark Juergensmeyer, *Op. cit.*, pp. 263-266
[6] Jürgen Habermas, *Op. cit.*, pp. 134-136
[7] Talal Asad, *Formations of the Secular: Christianity, Islam, Modernity*, Stanford University Press, Stanford, California, 2003, p. 23
[8] *Ibidem*, pp. 1-3
[9] *Ibidem*, pp. 182-194
[10] *Ibidem*, pp. 191-193
[11] John Gray, *Op. cit.*, p. 91
[12] *Ibidem*, pp. 3-23

who is "profane". Both Bail and Haidt warn that the current architectures of social networks stimulate outrage rather than dialogue. One solution is algorithmic rehumanization, the redesign of platforms to promote empathy and moral diversity[1]. For example, experiments conducted by Twitter with "context" labels reduced misinformation and aggression by 29%[2]. Digital education and "epistemic courage" are essential for rebuilding a moral culture of conversation, where difference is not a threat but an opportunity for learning[3].

Over the next five years, Europol reports (2024) and Pew Research Center studies (2023 and 2025) estimate an increase in online radicalization centered on moral issues—identity, religion, climate, gender, and sovereignty[4]. Without mechanisms for moral reconciliation, democratic societies risk value atomization and an increase in ideologically motivated violence. Solutions must combine: educational policies for civic-moral literacy, digital platforms with ethical accountability, and an international "moral diplomacy" aimed at reducing tensions between religious and secular identities[5]. Thus, the security of the future depends not only on force, but on society's moral capacity to recognize its diversity as a form of shared wealth. Religiosity and radical secularism are not merely doctrines; they are moral structures of meaning. When absolutized, they become instruments of hatred; when mutually translated, they become instruments of reconciliation. Post-extremist moral reintegration does not entail the disappearance of conflict, but its moral domestication, transforming hatred into productive disagreement, sacrality into respect, and difference into dialogue. As Ricoeur wrote, reconciliation does not erase evil, but gives it a meaning that no longer destroys[6]. This is, perhaps, the ethical challenge of the twenty-first century: to build a society in which the sacred and the profane coexist without moral warfare, within a plurality of meanings united by a shared dignity.

Conclusions

This analysis aimed to clarify one of the most acute tensions of the contemporary world: the confrontation between religiosity and radical secularism in their extreme forms, as a source of moral, ideological, and increasingly security-related polarization. At the center of this confrontation is not merely a dispute of ideas, but the clash of two moral frameworks, each defining in its own way what constitutes good, truth, and legitimate order.

The main conclusion is that religious and secular extremes do not oppose each other by nature, but through the absolutization of their own values and the refusal of moral pluralism. Radical right-wing movements sacralise tradition, faith, and national identity, transforming them into instruments of exclusion and defence of an order perceived as divine.

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[1] Chris Bail, *Op. cit.*, pp. ix–xii; pp. 130-133; Jonathan Haidt, *Op. cit.*, pp. 311-326

[2] Twitter Transparency Report, *Quarterly Data on Behavioral Interventions and Content Moderation*, 2023, p. 4, https://transparency.x.com/content/dam/transparency-twitter/2024/x-global-transparency-report-h1.pdf, (15.10.2025)

[3] Jonathan Haidt, *Op. cit.*, pp. 19-22; pp. 320-326; pp. 365-371

[4] Europol, *European Union Terrorism Situation and Trend Report (TE-SAT 2024)*, p, 38; Richard Wike, Janell Fetterolf, Jonathan Schulman, Sofia Hernandez Ramones, *Attitudes toward reforming the political system*, "Pew Research Center", 2025, https://www.pewresearch.org/2025/09/15/attitudes-toward-reforming-the-political-system/ (17.10.2025); Moira Fagan, Maria Smerkovich, Andrew Prozorovsky, *Americans' views of global threats differ by party, age*, "Pew Research Center", 2025, https://www.pewresearch.org/short-reads/2025/08/19/americans-views-of-global-threats-differ-by-party-age/ (17.10.2025); Janna Anderson, Lee Rainie, *Themes: The most harmful or menacing changes in digital life that are likely by 2035*, "Pew Research Center", 2023, https://www.pewresearch.org/internet/2023/06/21/themes-the-most-harmful-or-menacing-changes-in-digital-life-that-are-likely-by-2035/ (17.10.2025)

[5] Mark Juergensmeyer, *Op. cit.*, pp. 256-281

[6] Paul Ricoeur, *Oneself as Another*, translated by Kathleen Blamey, University of Chicago Press, Chicago and London, 1992, pp. 247-248

Radical left-wing movements sacralise equality, reason, and social justice, treating them as absolute moral imperatives and rejecting value differences. In both cases, the sacred becomes a weapon: what is faith for one camp becomes superstition for the other; what is freedom for one side becomes profanation for the other. This symmetry generates a self-destructive dynamic: the right asserts itself through opposition to secularism, the left through opposition to religion. Instead of moral balance, contemporary society develops two totalizing moralities in constant and increasingly unnegotiable conflict.

Polarization is amplified by the digital environment and media infrastructure: social networks, recommendation algorithms, and fragmented information ecosystems turn outrage into a reward and moral anger into a sign of virtue. In these spaces, religion and secularism no longer serve as modes of reflection but as identity markers that segment and hierarchize incompatible camps. Contemporary extremism becomes more emotional than ideological, feeding on resentment, fear, and the need for moral certainty. Both religion and ideology function as instruments of cohesion and justification for action, even violent, where hatred becomes a form of loyalty and intolerance a proof of virtue.

However, the analysis shows that each form of sacrality also holds the potential for reconciliation. Religion, freed from political instrumentalization, can foster solidarity, compassion, and community meaning; secularism, liberated from militant reflexes, provides the critical space for coexistence and freedom of conscience. Confrontation becomes dangerous only when each camp loses the capacity for self-reflection and perceives itself as absolute truth.

The civic stakes are thus high: societies that fail to manage moral plurality risk fragmenting into parallel community's incapable of cooperation and trust. The loss of a shared space for dialogue equates to the loss of democracy. Solutions cannot be merely punitive but must be restorative, cantered on education, dialogue, and the rehumanization of social relations. From this perspective, several strategic directions emerge:

- Rehabilitating moral dialogue - creating institutional and civic spaces where religious and secular voices can coexist without demonization.
- Education for pluralism - developing the capacity to understand and respect moral differences through moral, digital, and civic literacy.
- Rebuilding institutional trust - restoring the moral authority of the state and civil society through example and transparency.
- Responsibility in digital spaces - redesigning communication platforms as moral spaces, protecting pluralism and limiting the amplification of hatred.
- Promoting civic empathy - recognizing the dignity of others as the foundation of a public ethics of coexistence.

Overall, radical religiosity and secularism are two faces of the same modern crisis of meaning. The problem is not sacrality itself, but its manifestation without awareness of its limits. When the sacred is not tempered by moral reflection, it turns into dogma, and dogma into violence. Reconciliation does not mean eliminating difference but accepting reflective coexistence: authentic religiosity and mature secularism can coexist within human dignity, where meaning is shared, not monopolized.

Depolarization does not require abandoning convictions but learning the art of living with difference. Hatred does not generate stability; mutual recognition does. The society of the future will be more united not because people think alike, but because they can disagree without hatred. In a world where everything tends to be moralized, true virtue lies in transforming morality into dialogue, not into a weapon. This is the essential stake: the moral

rehumanization of the contemporary world through the balance between faith and reason, between the sacred and the profane, between conviction and doubt.

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MODELING THE RESILIENCE OF POWER SYSTEMS TO CRITICAL EXTERNAL IMPACTS*

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Abstract

Energy systems form the core of modern societal functioning, and their reliability directly influences public safety as well as the stability of national and regional economies. In the context of increasing hybrid threats, assessing the vulnerability of power networks and their capacity to maintain operational resilience has become critically important.

The purpose of this research is to develop a minimal mathematical model that enables the analysis of power system behavior under critical disturbances and supports the prediction of systemic failures and their consequences. The proposed approach integrates two complementary levels. The deterministic level describes the dynamic response of the power grid and the cascade effects associated with line overloads and frequency deviations from nominal values. This is achieved through the use of swing equations for synchronous machines and the computation of power-flow redistribution under crisis conditions. The stochastic level introduces uncertainty stemming from random equipment failures and rare but severe external shocks, modeled via a Poisson process combined with heavy-tailed distributions.

To evaluate system resilience, multiple computer simulations are performed, yielding key indicators such as Expected Unserved Energy (EUE), average recovery time (TTR), and the probability of system collapse. The model is sufficiently realistic, incorporating correlated component failures and limited repair resources.

The practical relevance of the study lies in its applicability to risk assessment, scenario analysis, verification of emergency automation systems, and prioritization of infrastructure restoration. Thus, the model serves as a versatile analytical tool for engineers and energy policy experts seeking to enhance energy security and system resilience.

Keywords: power system, swing equations, stochastic processes, external shocks, equipment failures.

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Introduction

Energy security is a fundamental component of human security, as the uninterrupted operation of electric power systems (EPS) directly influences economic stability, quality of life, and the protection of the population during crisis situations[1]. In the twenty-first century, the reliability of energy infrastructure has become increasingly critical due to the growing number of risk factors, ranging from natural disasters and technological accidents to cyber threats and geopolitical crises[2]. Modern EPS are becoming progressively more interconnected and digitalized, which enhances their efficiency but simultaneously increases their vulnerability to significant external disturbances capable of triggering systemic failures and cascading outages[3]. Classical methods of power system stability assessment are primarily based on deterministic models that accurately describe frequency dynamics and power-flow redistribution, but they do not capture the stochastic nature of external shocks and the unpredictability inherent in emergency developments[4]. Probabilistic and statistical approaches, on the other hand, enable the assessment of equipment failure risks but often substantially oversimplify the physical processes underlying system dynamics[5]. As a result, a methodological gap emerges between engineering-based and stochastic approaches, limiting the precision of forecasts and reducing the practical applicability of the models under uncertainty[6].

In the recent years, increased attention has been directed toward the combined use of physical and probabilistic techniques within the broader framework of resilience, the capacity of EPS to withstand critical impacts and recover from them[7]. This integration leads to the development of hybrid models in which continuous system dynamics coexist with a discrete flow of random events such as external shocks, protection actions, equipment failures, and recovery processes[8]. The present study aims to develop a stochastic–deterministic model that enables a quantitative assessment of EPS behavior under the influence of rare, high-impact disruptive events. The proposed model conceptualizes the power system as a dynamic stochastic network whose elements and interactions evolve over time under the influence of both physical laws and random factors[9]. This approach makes it possible to compute not only traditional power engineering indicators but also probabilistic resilience metrics such as the probability of system collapse ($P_{collapse}$), Expected Unserved Energy (EUE), Time to Recovery (TTR), and an integrated Resilience Index (RI)[10].

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This research contributes to the advancement of analytical tools for risk assessment and the enhancement of energy security, offering both engineering–economic and socio-political relevance in the context of contemporary international challenges[1].

Theoretical Background

The development of comprehensive resilience models for power systems, models that account for both the physical dynamics of electrical networks and the probabilistic nature of external disturbances, has become increasingly important. Accordingly, the proposed stochastic–deterministic framework is based on combining two complementary levels of representation: a physical level and an event-based level. The first captures the continuous dynamics of the power system, while the second model's random external shocks, protection actions, and recovery processes. The physical level is grounded in classical representations of synchronous generator dynamics, described by the swing equations. These equations reflect the balance between mechanical and electrical power inputs and link rotor frequency deviations to the system's inertia. This approach makes it possible to conceptualize the power system as an ensemble of interconnected oscillators whose collective dynamics determine system stability. Deviations of system frequency from its nominal value serve as an indicator of the balance between electricity generation and consumption, while the time required for power-flow redistribution across network nodes reflects the system's ability to adapt to disturbances.

However, deterministic descriptions alone are insufficient for analyzing real-world crisis scenarios, where random events disrupt normal system operation. To address this limitation, the model incorporates a stochastic component that captures external shocks of various origins: natural disasters, cyberattacks, physical damage to lines and equipment due to accidents, military actions, or climate-related factors. These events are modeled using random processes, specifically, Poisson processes for frequent events and heavy-tailed distributions for rare but high-impact events. This dual representation reflects the destructive potential of disturbances: mild for frequent events and severe for rare events capable of causing systemic failures or cascading outages.

Protective mechanisms play a critical role in shaping the system's response. One of the most widely used methods for preventing collapse is Under-Frequency Load Shedding (UFLS). This protection mechanism is triggered when frequency drops below predefined thresholds and sequentially disconnects portions of the load to halt further frequency decline and prevent generator desynchronization. The model incorporates a multi-stage UFLS scheme with distinct activation delays, enabling realistic reproduction of power system behavior under critical conditions. An essential element of the model is the stochastic representation of recovery processes. Each component of the power system can transition between operational and failed states with certain probabilities. These transitions form a Markov chain, whose parameters are determined by average repair durations and recovery priorities. Thus, the system is treated as a dynamic structure evolving under the influence of random events and repair procedures, whose durations are modeled as random variables.

To quantify resilience, several key metrics are introduced. The probability of system collapse, $P_{collapse}$ represents the share of simulated scenarios in which a large-scale disruption of power supply occurs. The EUE expresses the average amount of energy not delivered to consumers. The TTR measures the speed at which the system returns to normal operation.

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Additionally, the RI is employed, defined as the area under the service-level curve over time. It characterizes the overall capability of the system to withstand external impacts and recover from them.

In summary, the proposed theoretical framework integrates physical, stochastic, and operational aspects of power system behavior. It allows the analysis of various disturbance types, the evaluation of the effectiveness of protection and recovery strategies, and the formulation of quantitative resilience metrics suitable for both scientific research and practical tasks related to energy security.

Research Methodology

The research methodology employed in this study is based on the development of a hybrid stochastic–deterministic model designed to analyze the resilience of EPS under large-scale external disturbances. The core idea of the approach lies in combining physical equations governing frequency dynamics and power-flow redistribution with probabilistic models describing random shocks, equipment failures, and recovery processes. This integrated framework enables the assessment of EPS behavior under uncertainty and facilitates the derivation of quantitative resilience indicators[1].

General Structure of the Model

The EPS is conceptualized as an electrical network composed of nodes (generators and loads) and links (transmission lines) representing system elements. Each node is characterized by inertia, damping, and primary frequency response parameters, while transmission lines are constrained by thermal and stability limits[2].

The continuous part of the model describes the time evolution of system frequency and power-flow distribution as functions of power imbalance. These processes are computed using simplified dynamical equations numerically integrated with small time steps.

Superimposed on this physical layer is a discrete event-driven layer that simulates external shocks, equipment failures, protection actions, and recovery processes. Each event alters the state of the EPS, resulting in the disconnection of system elements, reduction of load, or, conversely, the restoration of equipment. By combining continuous dynamics with discrete stochastic transitions, the model produces a comprehensive representation of EPS evolution under random disturbances[3].

Stochastic Component

External disturbances are modeled using a random process, specifically, a Poisson process with parameter λ, which determines the expected number of shocks per unit time. To capture the behavior of large-scale, high-impact disturbances, heavy-tailed distributions (such as Pareto or log-normal) are applied. Each shock is characterized by its destructive magnitude, the number of affected system components, and the time of occurrence[4]. Recovery processes are modeled using random variables with exponential distributions. By selecting appropriate parameter values, the model accounts for varying repair durations of lines and generators. As a result, the EPS is represented as a collection of elements existing in

[1] Federico Milano, *Power System Modelling and Scripting,* Springer, London, 2010, pp. 1–10
[2] Paul Malcom Anderson, Aziz A. Fouad, *Power System Control and Stability,* Wiley-IEEE Press, Piscataway, 2003, pp. 1–10
[3] Ozan Boyaci, et al., *Spatio-Temporal Failure Propagation in Cyber-Physical Power Systems*, "Smart Grid and Renewable Energy", 2022, pp. 46–65
[4] Enrico Zio, *The Monte Carlo Simulation Method for System Reliability and Risk Analysis,* Springer, London, 2013, pp. 1–14

one of three states—operational, disconnected, or under repair—with stochastic transitions occurring between them[1].

Power System Response and Protection Mechanisms

In the proposed model, each external event induces a change in the topology of the electrical network and triggers a redistribution of power flows. When a power imbalance persists for a specified duration, the affected system element, either a transmission line or a generator, is disconnected by the automatic protection system[2].

In addition, the model incorporates a multi-stage UFLS scheme activated when system frequency falls below predefined thresholds. When the frequency reaches a critical level, a portion of the load is shed, thereby preventing further degradation of system stability and avoiding the onset of a systemic collapse[3].

Simulation Procedure

System resilience is assessed using a Monte Carlo simulation framework. For each scenario, the occurrence times of external shocks, as well as the sequence of equipment failures and recoveries, are generated randomly. Between these stochastic events, the model performs numerical integration of the dynamic equations while accounting for system responses and protection actions[4]. At the end of each simulation run, all key parameters, including system frequency, power flows, shed load, and the operational states of system components—are recorded. This procedure is repeated many times (up to several hundred runs), enabling statistically reliable estimates of the probability of system failures and recovery-related performance metrics[5].

Model Parameters and Input Data

The computational experiments employ the following model parameters: peak system load of 12,000 MW; available power reserve (PR) ranging from 5% to 25%; shock arrival rate λ varying from 0 to 0.05 events per hour; Pareto distribution parameter $\alpha = 2$; generator recovery times ranging from 4 to 24 hours; and transmission line recovery times ranging from 2 to 12 hours[6]. The modeled EPS is assumed to exhibit an inertia level on the order of 10–100 arbitrary units. The UFLS mechanism is represented by a three-stage scheme: disconnection of 5% of peak load at a frequency drop to 49.0 Hz; an additional 10% at 48.5 Hz; and a further 20% at 48.0 Hz. In the simplest case, as illustrated in Figure 1, the simulation is performed using a single UFLS threshold, disconnecting 5% of the load at 49.0 Hz, followed by a continuous frequency decline down to 48.0 Hz without any additional load shedding.

[1] Konstantin A. Shcheglov, Alexander Yu. Shcheglov, *Markov Models of Information System Security Threats*, "Instrument Engineering", 2015, pp. 5–11

[2] Peter W. Sauer, M. A. Pai, Joe H. Chow, *Power System Dynamics and Stability,* Wiley-IEEE Press, Hoboken, 2017, pp. 3–17

[3] Sina Amini, Fabio Pasqualetti, Hamed Mohsenian-Rad, *Dynamic Load Altering Attacks Against Power System Stability*, "IEEE Transactions on Smart Grid", 2018, pp. 2872–2883

[4] Enrico Zio, *The Monte Carlo Simulation Method for System Reliability and Risk Analysis,* Springer, London, 2013, pp. 1–14

[5] Roy Billinton, Ronald N. Allan, *Reliability Evaluation of Power Systems,* Springer, New York, 1996, pp. 12–15

[6] Federico Milano, *Power System Modelling and Scripting,* Springer, London, 2010, pp. 1–22

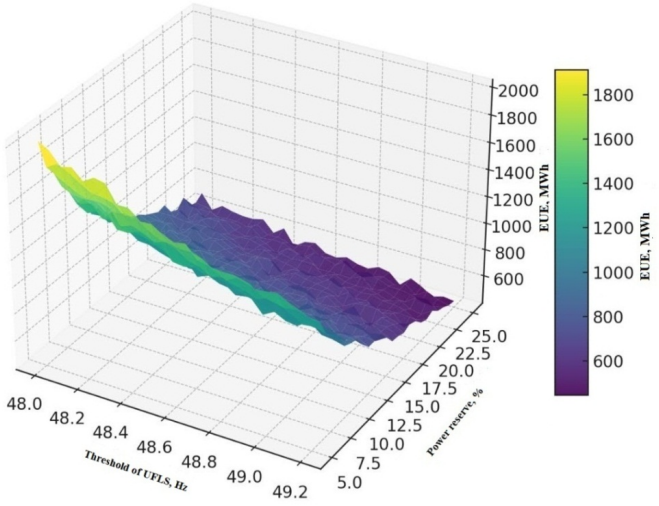

Figure 1. Dependence of the expected undelivered energy (EUE) on the volume of activated power reserve (PR) and the threshold of UFLS[1]

Resilience Metrics, Validation, and Reproducibility

Based on the simulation results, the following model indicators are computed: EUE, TTR, $P_{collapse}$, and RI. These probabilistic metrics enable comparative evaluation of different disturbance scenarios and assessment of the effectiveness of various resilience-enhancing measures[2]. Model validation is carried out using baseline scenarios-stable system operation without shocks, single-element outages, and typical UFLS activation patterns. Numerical accuracy is ensured through adaptive integration methods and checks based on the energy conservation principle[3]. All stages of the simulation process are fully formalized, ensuring reproducibility of results and facilitating the application of the model in practical research on energy security.

Numerical Modeling Tools

To implement the proposed model in practice, a modular computational architecture was employed, ensuring flexibility, scalability, and reproducibility of results. The model was tested using several computational environments - Python, MATLAB, and Julia - each offering distinct advantages for specific components of the simulation framework. Python served as the primary platform for implementing the stochastic–deterministic scheme. Using the NumPy and SciPy libraries, numerical integration of differential equations describing frequency dynamics and power-flow redistribution was performed. The panda power package was used for calculating electrical power flows under varying line and generator states. For executing multiple Monte Carlo simulations, the joblib library enabled efficient parallelization across multiple processor cores, thereby ensuring statistical reliability of the results within reasonable computation time.

[1] Authors' own simulation results

[2] Jovica V. Milanović, *Probabilistic Methods for Power System Resilience Assessment,* Springer, Cham, 2019, pp. 92–109

[3] Kun Huang, Changyun Zhou, Yu-Chu Tian, Shuang-Hua Yang, and Yukun Qin, *Assessing the Physical Impact of Cyberattacks on Industrial Cyber-Physical Systems*, "IEEE Transactions on Industrial Electronics", 2018, pp. 8153–8162

MATLAB was used to verify the continuous dynamics of the power system and the relay protection algorithms. The SimEvents toolbox allowed the implementation of the discrete event-driven component of the model, including the generation of random shocks, protection actions, and restoration schedules. MATLAB's strengths in visualizing time-domain processes and conducting parameter sensitivity analyses made it suitable for validating the physical layer of the model and ensuring consistency between its stochastic and dynamic components. Julia was employed to optimize the computational performance of the experiments. The DifferentialEquations.jl and PowerModels.jl packages provide high-speed numerical solvers for systems of equations. Combining Python-like syntax with C-level execution performance, Julia represents a promising platform for further developing the model-particularly in the direction of parallel simulations and cloud-based computations. The architecture of the implemented model consists of several modular components, including:

- a shock-generation module, which determines the timing and frequency of random external impacts;
- a dynamic integration module, responsible for numerically solving the equations governing system frequency and power flow;
- a protection module, implementing UFLS algorithms;
- a recovery module, modeling probabilistic repair processes;
- analytical modules calculating the resilience metrics (EUE, $P_{collapse}$, TTR, RI).

Data exchange among modules is handled through unified data structures, enabling easy modification of model parameters, the integration of additional computational components, or replacement of existing ones. Owing to this architecture, the developed computational environment can be used not only for academic research but also for applied purposes, such as risk assessment, operator training, or analysis of post-fault restoration strategies.

Discussion of the Results

The simulation results demonstrate that integrating deterministic and stochastic approaches enables a more comprehensive representation of power system behavior under diverse external disturbances. The analysis of the resulting probabilistic resilience metrics provides insights into the relationship between the structural properties of the EPS, the configuration of its protection mechanisms, and the likelihood of systemic collapse. Several of the obtained results - expressed as functional dependencies of key resilience metrics on the model parameters - are presented in Figures 1-3.

The EUE metric characterizes the expected amount of energy not delivered to consumers as a result of power imbalance. In general, lower EUE values indicate that the power system is more effective at withstanding shocks and restoring its normal operating state more rapidly. Special attention is given to the influence of parameters related to power reserves and the UFLS scheme on the behavior of the modeled EPS. As shown in Figure 1, EUE decreases as the available spinning reserve (PR) increases. It should also be noted that higher reserve capacity leads to smaller frequency deviations and a reduced probability of system collapse. Appropriately selected activation thresholds of the UFLS stages ensure early and proportionate load shedding, thereby preventing the development of cascading outages. However, excessively aggressive UFLS settings may result in unnecessary load disconnections and an increase in EUE, highlighting the need for an optimal balance between UFLS response speed and service continuity. The TTR metric represents the average time required for the EPS to recover to at least 90% of its initial service level. Its value is directly influenced by the rate of repair processes, availability of reserve capacity, and the

coordination of operator actions. As illustrated in Figure 2, TTR decreases - similar to EUE - with increasing PR, and rises as the shock arrival rate grows.

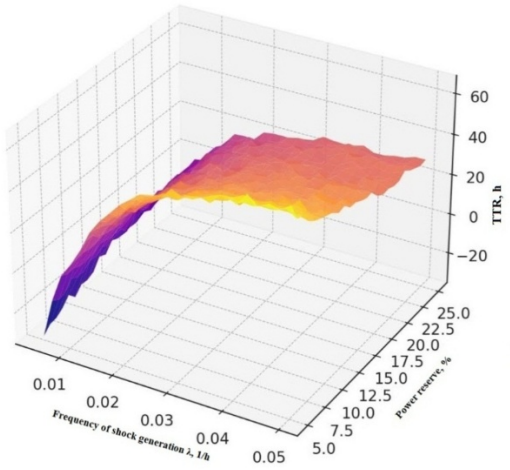

Figure 2. Dependence of the mean time to recovery (TTR) on the frequency of shock generation (λ) and the volume of power reserves (PR)[1]

The probability $P_{collapse}$ is defined as the fraction of scenarios in which large-scale consumer outages occur. A decrease in this metric indicates improved overall resilience of the EPS. The effect of shock frequency on $P_{collapse}$ is presented in Figure 3.

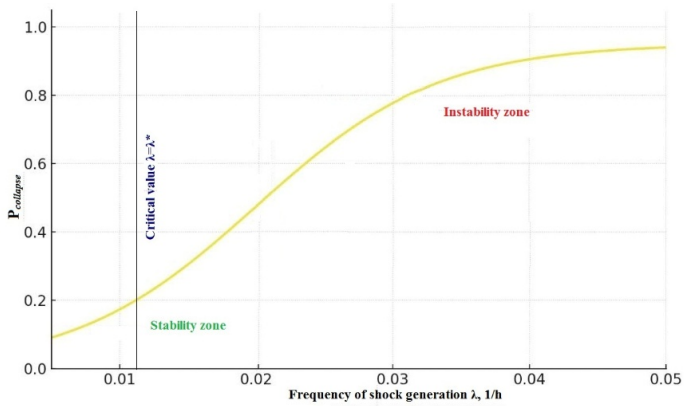

Figure 3. The dependence of the probability of system collapse ($P_{collapse}$) on the frequency of shock generation (λ). The λ parameter has a critical value of λ*=0.01125[2]

The RI captures the integral dynamics of the service level over time, indicating how rapidly the EPS restores its functionality after a disturbance or failure. This index is particularly useful for selecting and comparing alternative protection and recovery strategies.

Analysis of scenarios with varying shock arrival rates λ demonstrates that the modeled system exhibits a nonlinear relationship between resilience metrics and the frequency of external disturbances (see Figures 2 and 3). At low values of λ, the EPS remains stable because the recovery time is short; however, when λ exceeds a critical threshold λ = λ*, a pronounced increase in the probability of system collapse is observed (Figure 3),

[1] Authors' own simulation results
[2] Authors' own simulation results

accompanied by a corresponding increase in recovery time (Figure 2). This behavior indicates the presence of a limiting regime beyond which the EPS transitions into a collapse state, resulting in large-scale disruption of electricity supply. The significance of the obtained results lies in the ability to derive quantitative assessments of the consequences of various emergency scenarios, predict reserve and resource requirements, determine restoration priorities, and optimize protection parameters. Thus, the proposed model can serve as a decision-support tool for operators and regulators, as well as for strategic planning and risk analysis in the broader context of energy security.

Conclusions

The conducted study enabled the development and validation of a stochastic–deterministic model designed to analyze the resilience of EPS under large-scale external disturbances. Unlike traditional approaches that rely solely on deterministic descriptions, the proposed model integrates the physical dynamics of the electrical network with stochastic processes representing random factors affecting the EPS. This integration provides a more realistic representation of system behavior during crisis conditions.

The developed methodology allows for the quantitative assessment of the probability of system collapse, the integral resilience index, the average recovery time, and the expected amount of unserved energy under various disturbance scenarios. Through multiple Monte Carlo simulations, statistically robust results are obtained, while the introduced metrics (EUE, TTR, RI, and $P_{collapse}$) enable comparative evaluation of different operating regimes and protection configurations.

The minimal nature of the model is achieved through the use of an approximate frequency-dynamics description based on the swing equations, without incorporating the detailed internal processes of generators. This simplification enables high-speed Monte Carlo simulations while accounting for the stochastic nature of numerous events within the EPS, including external shocks, protection actions, equipment failures, and recovery processes.

The practical applicability of the model follows from its ability to support planning and evaluation of diverse measures aimed at enhancing energy security using well-defined resilience metrics. The model can be employed by system operators, regulators, and expert organizations to justify decisions related to reserve and resource management, tuning of emergency automation, and the development of infrastructure restoration plans.

Future development of the model may include incorporating additional external and internal factors into scenario analyses, extending the recovery module to account for variable restoration priorities, and introducing a feedback module based on real-time grid monitoring data. Such enhancements will support the creation of a universal platform for assessing the resilience of critical energy infrastructure under growing hybrid risks.

In summary, the proposed model constitutes a resilience analysis tool for power systems that effectively combines engineering and probabilistic approaches and contributes to the advancement of the scientific foundations of energy security.

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POSITIVE INTERSTUDENT COMMUNICATION AS FOUNDATION OF A SAFE UNIVERSITY ENVIRONMENT: A SOCIOLOGICAL ANALYSIS

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https://doi.org/10.54989/stusec.2026.20.01.05

Abstract

This study examines how generally positive interstudent communication, non-serious conflict motives, and students' tolerance toward vulgar language contribute to a safe climate of interaction in the university environment. The case study is the University "Luigj Gurakuqi" in Shkodër, Albania, where interstudent communication is treated as an indicator of social and psychological safety on campus. The study is based primarily on a self-administered questionnaire with 89 structured items and 7 open-ended questions, completed by 135 students (110 bachelor's; 25 master's), and complemented by 11 informal student conversations used for contextualization. Quantitative data were analyzed using SPSS and descriptive statistics, while open-ended responses helped enrich the interpretation of the findings.

The findings indicate that disagreements and conflicts occur at low levels and are generally perceived as rare and of peripheral importance. Comparative references to the wider national dataset further support the interpretation of the University of Shkodra as a relatively less conflictual university environment. Overall, predominantly positive communication is associated with freedom of expression without fear of prejudice. The study is situated within a broader national research framework conducted from May to October 2025, involving 1,144 students across 12 public universities in the Republic of Albania.

Keywords: interstudent communication; conflict motives; cultured language; vulgar language; safe environment

Introduction

Interaction and communication among students constitute an important component of the university experience, as they create peer-support networks that contribute to students' well-being and adjustment to the academic environment. Students shared participation in the university setting over several years fosters and develops a wide range of social relationships through communication, interaction, perceptions, and even mutual prejudices. Students come to university with different experiences, values, and ways of approaching academic tasks, which may lead to misunderstandings and tension. Miscommunication, misunderstandings, or differences in approaches to problem-solving may arise[2].

In university settings, psychological safety refers to the perception that lecture halls and interaction spaces are places where students can express themselves freely, share

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[2] David Nadler Prata, *The Role of a Help Requester in Collaborative Learning*, "International Journal of Information and Education Technology", Vol. 6, No. 11, 2016, pp. 859-862, https://doi.org/10.7763/IJIET.2016.V6.805

opinions, ask questions, and participate in discussions without being judged or "penalized" by others. This perception is often built gradually through routine everyday communication and may remain implicit rather than becoming an explicit topic of conversation[1]. Espelage et al. argue that positive relationships between instructors and students contribute to a safer climate and to stronger perceptions of safety in lecture halls. Uncivil communication may occur when a student does not feel accepted, respected, or treated equally compared to others, given that uncivil communication, among other things, can be a response individuals display to different forms of social insecurity[2].

Some authors argue that having strong social support facilitates cooperation among individuals; the better peer relationships are, the higher the quality of cooperation in pursuing shared goals[3]. One of Piispanen's key findings in her doctoral dissertation, which examines learning environments, is that a good learning environment is a safe environment[4]. A safe university environment may be understood as a social climate in which students experience everyday interaction as respectful, inclusive, and free from exclusion or negative judgment. In higher education, students' perceptions of psychological safety are closely associated with peer interaction and collaborative learning contexts. In this sense, positive interstudent communication may be interpreted as an important relational dimension of a safe university environment[5].

Positive interstudent communication is approached in this study not simply as the absence of conflict, but as a sociologically significant indicator of a safe university environment. Within this perspective, psychological safety, social cohesion, trust, and everyday communication are understood as closely interconnected dimensions of university life. A safe university environment is thus conceived as a relational climate in which everyday interaction reproduces mutual respect, communicative restraint, and confidence among students, while containing tensions within socially manageable limits.

Methodology

The University "Luigj Gurakuqi" of Shkodër was selected as a relevant case within Albanian higher education. As the principal public university in northern Albania, it attracts students mainly from the north of the country, but also from other regions and, to a lesser extent, from neighbouring contexts. Its inclusion is also relevant because public perceptions and cultural stereotypes have sometimes associated northern Albania with stronger forms of conflictual behaviour; however, the findings of this study point instead to a relatively stable and less conflictual interstudent climate. The case is also situated within the author's broader

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[2] Dorothy L. Espelage, Joshua R. Polanin, Sabina K. Low, Teacher and Staff Perceptions of School Environment as Predictors of Student Aggression, Victimization, and Willingness to Intervene in Bullying Situations, "School Psychology Quarterly", Vol. 29, No. 3, 2014, pp. 287–305, https://doi.org/10.1037/spq0000072

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[4] Maarika Piispanen, *Hyvä oppimisympäristö: Oppilaiden, vanhempien ja opettajien hyvyyskäsitysten kohtaaminen peruskoulussa*, Doctoral dissertation, University of Jyväskylä, Kokkola University Consortium Chydenius, 2008, http://urn.fi/URN:ISBN:978-951-39-4871-9 (21.04.2026)

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doctoral research on student conflicts across 12 public universities in the Republic of Albania.

The primary method of data collection was a survey, designed on the basis of a preliminary review of theories of communication, behaviour, and youth conflicts. The questionnaire included 89 structured questions with 343 response options, as well as seven open-ended questions. It was pilot-tested in advance with students at the University of Tirana. The 135 students included in this article were surveyed through in-classroom administration until the planned institutional sub-sample was reached. This sub-sample formed part of a wider national research design targeting 1,146 students, of whom 1,144 provided valid questionnaires. Of the 135 respondents at the University of Shkodër, 110 were bachelor's students and 25 were master's students.

Questionnaire data were entered into Excel and subsequently analysed in SPSS. In addition, 11 informal conversations with students were conducted in order to capture more nuanced views on the issues under study. These conversations served as a complementary qualitative source and helped contextualise the quantitative findings by reflecting conversational openness and the generally friendly tone of interstudent and institutional interaction. They also strengthened the sociological interpretation of the data through selected student accounts, including illustrative elements drawn from conversations with students of the University of Shkodër. "The analysis of conversations often covers what may appear to be merely peripheral details of everyday life, yet these can be highly significant in sociological research. Ultimately, conversations are universal features of social activity."[1] Such conversations enriched the survey data.

The institutional sub-sample included 30 bachelor's students from the Department of Economics, 35 bachelor's students from the Department of Finance, 25 master's students from the Faculty of Economics, and 45 bachelor's students from the Faculty of Law. The surveyed students were enrolled at different stages of study, from the first year of the bachelor's programme to the second year of the master's programme. Two limitations should be acknowledged: not all faculties of the university were represented in the sub-sample, and the relatively small size of the institutional sub-sample limits broader generalisation of the findings.

Results: Communication Topics and Student Worldviews

Communication is a human activity that everyone recognizes, but few can define satisfactorily[2]. Intergenerational communication has continuously undergone significant changes, shaped by broader social developments. One may reasonably assume that in 1981, two students at the Faculty of Political and Legal Sciences at the University of Tirana could not discuss political issues or electoral campaigns outside "official frameworks", because such discussions were impossible under a socio-political system dominated by a single party, the Party of Labour of Albania, which functioned as a party-state. Moreover, conversations with even slight oppositional political overtones could lead to serious legal trouble, including imprisonment.

The American communication scholar George N. Gordon defines communication as "the process of exchanging meanings among individuals through a shared system of symbols"[3]. The following data on students at the University of Shkodër should be understood

[1] Anthony Giddens, *Sociology*, 5th Ed. Cambridge Polity Press, 2006, p. 225
[2] John Fiske, *Introduction to Communication Studies*, Routledge, London, 2010, p. 1
[3] Glenn N. Gordon, *Communication*, "Encyclopaedia Britannica", https://www.britannica.com/topic/communication (21.01.2026)

in relation to their worldview and the shared system of symbols and meanings that shape contemporary social life, serving as an indicator not only for young people at this university but, in a broader sense, also for other young people in the Republic of Albania, in line with the social dynamics of the time.

Accordingly, to the question "What is the topic you discuss most with your closest friends"?, students responded as shown in the following table:

Topic	Bachelor n (%)	Master n (%)
About coursework	43	41
Literature	0	0
Films	5	0
Politics	14	8
Economics	11	12
Social media	20	18
Specific TV programs	3	16
Other	4	5
Total	**100**	**100**

Table 1. Topics that students most often discuss with their close friends in the faculty[1]

It is worth analysing, as a characteristic of students at the University of Shkodër, the fact that a considerable share of them around 11% report engaging frequently in communication about political issues, sometimes with passion and elevated tones that resemble a fan-like attitude. I also encountered this myself as a researcher during the survey process: two female students wrote at the end of the blank sheet attached to the questionnaire asking whether I supported their preferred political party. Other students would start political debates in the lecture hall as soon as one mentioned the development of tourism in the city of Shkodër, voicing both support for and opposition to local and central government policies.

Informal conversations with students suggested that political debates may at times become heated, but they were generally perceived as expressions of partisanship rather than as conflicts that escalate into real confrontation. The absence of literature as a reported topic of discussion suggests that extracurricular reading occupies a limited place in students' everyday peer communication.

Audio-visual media are also followed by fewer students compared to social networks. The place that specific TV programmes and films once held as a form of entertainment for the Millennial generation (those born from 1981 to 1996) appears, among Generation Z, to have been replaced by discussions about social media. Generation Z includes individuals born in 1995 or later, who have not experienced a world without digital technology[2]. The

[1] Author's research

[2] Nada Ameen, Amandeep Anand, *Generation Z in the United Arab Emirates: A Smart-Tech-Driven iGeneration*, "The New Generation Z in Asia: Dynamics, Differences, Digitalisation", Eds. Evrim Gentina, Emma Parry, Emerald Publishing, Bingley, 2020, pp. 181–192, https://doi.org/10.1108/978-1-80043-220-820201018

time once largely devoted to television as a mass source of information is now increasingly taken up by the global electronic network, which offers numerous platforms for information and entertainment.

The largest share of students, about 42% on average, state that they most often talk about their studies. The percentage shown in Table 1 should not be interpreted only as evidence of sustained interest in academic advancement. It also reflects students' practical need to stay informed about lecture notes, assignments, and course updates through their peers. Peer groups in which such conversations are a continuous topic are often regarded as friendships built around mutual professional interests. The indicator above points to dense interstudent cooperation in joint academic projects, thereby significantly strengthening the perception of a safe and welcoming university environment.

Students' Perceptions of Communication Vocabulary

"Sticks and stones may break my bones, but words will never hurt me." [1] This refrain from a pop song among young people could not be more wrong. Words cannot literally break people's bones, but they are powerful weapons that can leave psychological scars just as sticks and stones can leave physical marks. Perceptions of the level of vocabulary used in communication among university students help us understand the students' worldviews and the ways they show respect for themselves and others during everyday conversations. Accordingly, to the question, "How do you assess the vocabulary used in daily communication among students?", their responses are summarized in the following table:

Category	**Bachelor n (%)**	**Master n (%)**
Vulgar	7	33
Somewhat vulgar	31	7
Normal	57	45
Cultured	5	15
Total	**100**	**100**

Table 2. Everyday communication vocabulary, by study cycle[2]

It is worth analysing the "vulgar" indicator in the table, where 7% of bachelor's students and 33% of master's students consider the vocabulary used in their everyday communication to be vulgar.

Typically, with age, evaluative capacity improves, as does sensitivity to carelessly articulated words with vulgar connotations compared to younger ages. Nevertheless, the combined values for the "vulgar" and "somewhat vulgar" indicators are very similar around 38% among bachelor's students and 40% among master's students. These indicators point to a communication climate that requires institutional attention. The study by Ukhtinabila and Sholikhah, conducted with students at three universities in East Java, Indonesia, shows that the use of vulgar language in student conversations is associated with the expression of

[1] Stephen E. Lucas, *The Art of Public Speaking*, 11th Ed, McGraw-Hill, New York, 2011, p. 34
[2] Author's research

emotions, humour, social closeness, and peer influence[1]. In a similar vein, students at the University of Shkodra also display a relatively high level of tolerance toward this type of language. However, in the Albanian case, vulgar language appears not only as an element of social interaction, but also as a problematic indicator of communication ethics, particularly from the perspective of master's students. Master's students, owing to their greater emotional maturity, appear to approach the use of vulgar language more seriously. Although they may express disapproval toward such language and toward those who employ it, this attitude does not appear to translate into overt conflict.

These findings may be further interpreted in light of Sulpizio et al., who examined taboo language across 13 languages and 17 countries using data from 1,046 participants in Study 1 and semantic ratings from 455 participants in Study 2. Their results indicate that taboo words are typically characterized by extremely low valence, high arousal, and very low written frequency, but also by substantial cross-country variation in perceived taboo-ness and offensiveness. From this perspective, the higher proportion of master's students identifying everyday vocabulary as vulgar may reflect a more developed evaluative awareness rather than only a difference in actual communicative behaviour[2].

A cross-cultural study based on a 2018–2019 online survey of 518 respondents from Russia, Poland, the United States, and Ukraine found important differences in attitudes toward vulgar language among young people: tolerance was highest in Russia and Poland, whereas Ukrainian and American respondents displayed more negative attitudes overall, although Americans remained relatively more tolerant of its personal use.[3] Accordingly, Albanian students also appear to be more similar to young Americans and Ukrainians in terms of their lower tolerance of vulgar language used by others, while being more tolerant of its personal use among peers. Vulgar language is not ethical because it devalues people[4]. Such language is also a socially destructive force. A considerable proportion of bachelor's students consider even vulgar conversations to be normal. This is also evidenced by the fact that, although bachelor's students are more numerous, they rated conversations characterized by a cultured vocabulary at a minimal level of only 5%. Meanwhile, master's students reported, at a rate three times higher, around 15%, that communication among them is cultured.

To be ethical and to speak with civility means to behave ethically at all times, not only when it is convenient[5]. From the informal conversations with students, it was confirmed that vulgar language is to some extent considered "trendy" and is not viewed as particularly problematic; in fact, it is often perceived as a way of being included in a closer social circle.

Density of conflicts with female students

Given that female students make up more than 80% of the student body, the frequency of conflicts involving female students needs to be examined in order to analyse

[1] Frida Ukhtinabila, Masriatus Sholikhah, Unveiling the University Students' Motive of Using Taboo Words in Daily Conversation, "JEELL: Journal of English Education, Linguistics and Literature", Vol. 13, No. 1, 2026, pp. 37–51, https://doi.org/10.32682/jeell.v13i1.133

[2] Simone Sulpizio, et al., Taboo Language across the Globe: A Multi-Lab Study, "Behavior Research Methods", Vol. 56, No. 4, 2024, pp. 3794–3813, https://doi.org/10.3758/s13428-024-02376-6

[3] Natalia Tavrovetska, Victoria Shebanova, *Cross-Cultural Research of the Use of Obscene Language in the Youth Environment,* "Psycholinguistics", Vol. 28, No. 1, 2020, pp. 239–266, https://doi.org/10.31470/2309-1797-2020-28-1-239-266

[4] Stephen E. Lucas, *The Art of Public Speaking*, 11th Ed, McGraw-Hill, New York, 2011, p. 66

[5] *Idem*, p. 67

whether it is girls or boys who experience conflicts more often with female students. When asked, "How often have you been in conflict with female students in the same cycle of study?", students responded as shown in the following table:

Frequency	Bachelor (%)			Master (%)		
	Female	Male	Total	Female	Male	Total
Never	54	11	65	54	12	66
Rarely	21	3	24	14	12	26
Often	6	1	7	8	0	8
Almost always	3	1	4	0	0	0
Total	**84**	**16**	**100**	**76**	**24**	**100**

Table 3. Conflicts with female students, by gender and study cycle[1]

As shown in the corresponding charts, the values of all variables measuring the density of conflicts with female students are almost the same among bachelor's- and master's-level students. As expected, female students report conflicts with other female students more often than male students do; the density of conflicts among female students with other females is seven times higher than that of male students.

This pattern is not accidental, since female students are more directly exposed to one another in everyday academic life, and such proximity may increase the likelihood of misunderstandings, comparison, and interpersonal tension.

Among master's students, the indicators of conflicts with female students are more balanced in terms of the female–male ratio, also because master's courses typically include around 15–20 students, where the gender ratio is narrower than in bachelor's studies, and the values translate into higher levels for each indicator. It is worth emphasizing that, on average, about 66% of students stated that they do not have conflicts with female students. This is an indicator that can be considered normal given the different dynamics and motives for conflict in a society that is still experiencing pronounced problems due to a prolonged transition over the past 35 years.

At the level of inter-university comparison within the broader national study of 12 public universities, these findings gain sociological significance when the University of Shkodra is compared with the University of Arts. At the University of Shkodra, both female and male students are concentrated mainly in the category "Never" (64.4% and 69.2%, respectively), indicating that non-conflict constitutes the dominant pattern of interaction with female peers within the same cycle of study. At the University of Arts, by contrast, the corresponding shares are much lower (28.6% and 20.0%), while conflict is more concentrated in the higher-intensity categories. The contrast is most evident among male students, for whom the category "Often" reaches 53.3% at the University of Arts, compared with only 3.8% at the University of Shkodra.[2] This difference is particularly significant given that the

[1] Author's research

[2] Author's calculations based on the national survey database covering 12 public universities in the Republic of Albania.

University of Arts is located in Tirana, the country's principal academic and urban centre, whereas the University of Shkodra is situated in northern Albania, within a more peripheral academic context. In comparative terms, therefore, the University of Shkodra displays a more regulated and less conflictual pattern of interstudent relations. This comparison should not be read as an institutional ranking, but as an indication that different academic, urban, and disciplinary environments may produce different patterns of interstudent interaction.

Motives for conflicts among female students

Beyond conflict frequency, the analysis also considers the reasons students associate with these tensions.

Motive	**Bachelor (%)**			**Master (%)**		
	Female	**Male**	**Total**	**Female**	**Male**	**Total**
Occasional misunderstandings	44	9	53	20	10	30
Gossip	15	2	17	30	0	30
Prejudices	8	0	8	0	10	10
Unfair competition	5	3	8	20	0	20
Group dominance	14	0	14	0	10	10
Total	**86**	**14**	**100**	**70**	**30**	**100**

Table 4. Motives for conflicts with female students, by gender and study cycle[1]

Among bachelor's students, misunderstandings in communication appear as the principal cause of conflict, reported by 53% of respondents, including 44% female and 9% male students. The same motive remains the leading one among master's students as well, although at a lower level (30%). This finding is consistent with Nakata, Vuopala, and Weinberger's study of university students in Finland, which identifies misunderstandings in communication as a key source of conflict in collaborative student interaction[2].

In the open-ended question, where they described the issues they encounter in everyday life within university settings, students emphasized a lack of tolerance in communication. Gossip also accounts for a considerable share among female students: around 15% of them stated that they have been involved in conflicts because of things said about them behind their backs or in their absence. Scholar Artan Fuga cites an interesting expression about people who speak badly of others: "He always speaks sincerely, because he speaks behind people's backs"[3]. Another notable indicator is conflict arising from attempts to dominate the group. Among bachelor's students, this motive accounts for around 14% of conflicts among female students, whereas male students do not report such conflicts. This may also reflect the increasing presence of girls and women in leadership roles in Albanian society and, by extension, in student group dynamics.

[1] Author's research

[2] Azusa Nakata, Essi Vuopala, Armin Weinberger, *Conflict Experiences and Management Strategies in Intercultural Collaborative Learning*, "Research in Comparative and International Education", Vol. 20, No. 2, 2025, pp. 291–313, https://doi.org/10.1177/17454999251329258

[3] Artan Fuga, *Komunikimi në shoqërinë masive*, Papirus, Tiranë, 2014, p. 191

In the government and public administration of the Republic of Albania, over 45% of leadership positions are held by women[1]. In the field of education in the 2023-24 academic year, women predominate among teaching staff in nine-year basic education and in upper secondary education, accounting for approximately 79.1% and 71.0% of teachers at each level, respectively. At the higher education level, among full-time academic staff, women holding the title of Professor make up about 51.4%, while those holding the title of Doctor account for about 61.6%[2].

Zyhdi Dervishi has argued that, in many offices of social and non-public institutions, the rough, cunning, and at times enigmatic faces of men are being replaced by the more delicate faces of young female or women employees, who generally appear more inclined to address the various problems that concern citizens with greater dedication and correctness, in accordance with legal criteria[3]. Among master's-level students, the distribution of indicators is more linear, with conflicts due to occasional misunderstandings decreasing by about 23% in specific share compared with bachelor's-level students. Master's students are older and more mature, and therefore less likely to engage in conflicts over misunderstandings that most often arise from inappropriate wording in communication.

Among master's students, conflicts linked to gossip appear more frequent, suggesting a greater tendency to communicate dissatisfaction indirectly within trusted circles, which may in turn generate interpersonal tension. Unlike male bachelor's students, the situation is different among master's students, who showed little interest in competition and in dominating the group. Male master's students are just as interested and competitive as female master's students with regard to conflicts based on unfair competition and group dominance.

These motives indicate that conflicts among female students arise mainly from everyday communicative frictions and informal peer dynamics rather than from deep or persistent antagonisms. Such disagreements appear to be absorbed within ordinary peer interaction and therefore do not substantially weaken students' perception of psychological safety. In this sense, they reflect limited and socially contained tensions rather than a disruption of the broader safe university environment.

Frequency	**Bachelor (%)**			**Master (%)**		
	Female	**Male**	**Total**	**Female**	**Male**	**Total**
Never	65	14	79	63	16	79
Rarely	11	1	13	11	6	17
Often	3	2	5	2	2	4
Almost always	2	1	3	0	0	0
Total	**81**	**18**	**100**	**76**	**24**	**100**

Table 5. Density of conflicts with male students. Conflicts with male students, by gender and study cycle[4]

[1] Radio Televizioni Shqiptar, *Nga 2016–2024 rritet me 13.3% pjesëmarrja e grave në bordet drejtuese*, https://rtsh.al/nga-2016-2024-rritet-me-13-3-pjesemarrja-e-grave-ne-bordet-drejtuese/ (21.02.2026)

[2] INSTAT, *Women and Men in Albania 2025*, Tirana, 2025, p. 2, https://www.instat.gov.al/media/f4lhllkw/women-and-men-in-albania-2024.pdf (21.02.2026)

[3] Zyhdi Dervishi, *Gratë në turbulencat e mendësive dhe realiteti politik*, Shtëpia Botuese "Emal", Tiranë, 2011, p. 249

[4] Author's research.

As shown in Table 5, conflicts with male students are reported less frequently than conflicts with female students in Table 3. The share reporting "Never" is 79% for conflicts with male students, compared with 65–66% for conflicts with female students, a difference of about 13–14 percentage points. Female students report fewer conflicts with male students than with other female students. Male students also report relatively low levels of conflict with male peers, with the category "Never" remaining dominant in both cycles of study. In traditional Albanian society, conflicts between girls and boys were almost impossible. Boys could frequently come into conflict with one another, but not with girls. A reminiscence of the past is still present in the mentality of Albanian youth: that boys should not "get involved with girls and women," because conflict with them is not seen as a sign of masculinity.

Although male students represent a smaller share of the student body in both universities 20.5% at the University of Shkodra and 41.7% at the University of Arts conflicts involving male peers remain important for assessing the wider pattern of interstudent relations. Among female students, 81.2% at the University of Shkodra reported "Never," compared with 28.6% at the University of Arts. Among male students, 73.1% at the University of Shkodra reported "Never," whereas at the University of Arts the dominant response was "Rarely" (66.7%). Taken together with the findings on conflicts involving female students, where "Never" also predominated at the University of Shkodra among both female students (64.4%) and male students (69.2%), these indicators support the interpretation of the University of Shkodra as a relatively safer university environment, marked by more regulated and less conflictual interstudent relations[1].

Motives	**Bachelor (%)**			**Master (%)**		
	Female	**Male**	**Total**	**Female**	**Male**	**Total**
Occasional misunderstandings	38	19	57	22	13	35
Gossip	14	0	14	0	0	0
Prejudices	15	4	19	0	0	0
Attempts to dominate the group	10	0	10	0	0	0
Prejudices about clothing	0	0	0	30	0	30
Prejudice about behavior	0	0	0	20	0	20
Prejudice based on religious beliefs	0	0	0	5	10	15
Total	**77**	**23**	**100**	**77**	**23**	**100**

Table 6. Motives for conflicts with male students, by gender and study cycle[2]

The main motive for conflicts with male students is occasional misunderstandings. Among bachelor's students, this motive accounts for 57% of reported cases, with 38%

[1] Author's calculations based on the national survey database covering 12 public universities in the Republic of Albania
[2] Author's research

reported by female students and 19% by male students. However, when read within each gender group, misunderstandings represent about 49% of the motives reported by female bachelor students and about 83% of those reported by male bachelor students. This shows that male bachelor students are proportionally more likely to associate conflicts with male peers with misunderstandings.

Among master's students, occasional misunderstandings remain the main source of conflict, with only slight differences between female and male students. Another indicator of interest appears in the variable where a minority about 5% of females and about 10% of males state that they have experienced conflict due to prejudices they felt regarding their religious faith. It should be noted that Shkodër is among the cities where sensitivity toward religious beliefs is higher than in other parts of the Albanian-speaking area. With reference to conflicts with male students, male respondents do not report gossip as a motive at either level of study.

Among female bachelor's students, gossip appears as a secondary source of conflict in relations with both male and female peers, reported at about 14% and 15%, respectively. Even so, occasional misunderstandings in communication remain the main source of conflict, while gossip seems to play a more limited role in everyday student relations. In his study on students in secondary schools, among other things, Zyhdi Dervishi stated: "We believe that in the future, the extent of conflict among adolescents and young people under the pressure of gossip and prejudices will decrease significantly as a result of the influence of modern and postmodern developments[1]".

Also, among the main causes of conflicts encountered by residents in the Kamëz community migrants who have arrived from across the Republic of Albania sociologist Alfred Halilaj mentions misunderstandings in communication[2]. Among master's students, gossip does not appear as a reported motive for conflicts with male students. Instead, prejudices related to clothing and behaviour together account for 50% of the reported motives, and these are reported only by female students. More specifically, prejudices about clothing account for 30% of the reported motives among master's students, while prejudice about behaviour accounts for 20%; both indicators are reported only by female students.

The low density of conflicts with male students also supports the view that the university environment remains safe, as disagreements do not appear to escalate beyond heated debates into more serious conflict.

Discussions

Most students at the University of Shkodra have never had conflicts with fellow students. Conflicts are not frequent, but they are a concern among 25% of students, and they arise mostly as a result of occasional misunderstandings in communication, gossip, and various types of prejudices. Female students have conflicts more frequently with one another than with male students; misunderstandings are the main cause. These findings show that a safe university environment does not mean the absence of conflict, but a setting in which disagreements remain limited, socially contained, and unlikely to escalate.

One relevant sociological explanation for why these findings emerge in the University of Shkodra is that locally embedded norms of communication tend to discourage the open escalation of interpersonal tensions. In Shkodran folk speech, for instance, one encounters the

[1] Zyhdi Dervishi, *Adoleshentët, bashkëjetesë me demonët e konflikteve*, Shtëpia Botuese "Emal", Tiranë, 2013, p. 93

[2] Alfred Halilaj, *Zhvillime urbane, tradita dhe risi: Rasti i Kamzës*, West Print, Tiranë, 2021, p. 162

phraseological expression "të hyftë vetja në qejf,"[1] used in response to individuals who insult, speak in an imposing manner, or deliberately provoke confrontation. Rather than entering into direct conflict, the speaker symbolically neutralizes the interaction through a culturally coded response that allows tension to subside without immediate escalation. This form of expression may be viewed as a local communicative mechanism of conflict avoidance, reflecting a broader tendency to contain, rather than intensify, everyday interpersonal friction.

Regarding the level of language used, about 7% of bachelor's students and about 33% of master's students consider everyday communication to be vulgar. This difference indicates greater sensitivity toward communication with fellow students, shaped by increasing maturity with age and academic progress. Including those who evaluate communication as "somewhat vulgar," around 40% of students in both study programs agree that the ethics of the language used in communication is problematic. Only about 5% of bachelor's students and about 15% of those in the master's program consider the language used in communication to be cultured. Careless and vulgar language may create communicative tension, although students appear to show a high level of tolerance.

These findings indicate that, at the University of Shkodra, everyday disagreements are generally absorbed within ordinary peer interaction and do not appear to develop into persistent or intensified conflict. The comparison with the University of Arts adds further support to this interpretation, showing that the University of Shkodra is characterized by lower levels of more intense conflict in relation to both female and male peers. In this sense, positive interstudent communication can be seen as an indicator of a safer and more stable university environment.

Conclusions and Recommendations

The central finding of this study is that the University of Shkodra displays a relatively safe interstudent climate, not because conflict is absent, but because disagreements remain mostly rare, communicatively contained, and socially manageable. Based on survey data from 135 students at the University of Shkodra, complemented by informal student conversations, the study shows that student communication is shaped mainly by academic concerns, with course-related topics being the most frequent subject of discussion among close friends in both bachelor's and master's cycles. Social media also occupies an important place in peer interaction. Misunderstandings remain the main source of conflict, while the perception of everyday language as vulgar or somewhat vulgar points to a communication climate that still requires institutional attention. From the perspective of educational security, even relatively infrequent conflicts may weaken psychological safety, reduce classroom participation, and increase pressure on student support structures. This concern is consistent with recent research that treats student conflicts not only through their causes, but also through their consequences for the academic environment.[2]

To address these risks, the study recommends regular surveys on communication climate and safety, a confidential reporting channel, trained peer mentors, restorative mediation, and a clear policy for online communication. These measures may strengthen prevention, student well-being, and institutional stability. Since the findings are based on

[1] Arvit Bushati, *Rinia në Shkodër Ramës: Të ka hypur vetja në qejf!*, "Perqasje", September 16, 2016, https://perqasje.com/2016/09/rinia-ne-shkoder-rames-te-ka-hypur-vetja-ne-qejf/ (21.04.2026)

[2] Brunilda Zenelaga, Sherif Dervishi, Chiara Masaro, Ján Gabčo, Ervin Weiss, *Exploring Causes and Consequences of University Students' Conflicts: A Scoping Revie*w, "Journal of Education Culture and Society", Vol. 16, No. 2, 2025, p. 646, https://doi.org/10.15503/jecs2025.3.643.657

self-reported data from a single institution, they should be interpreted carefully and confirmed through broader future studies.

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MIGRATION GOVERNANCE AND THE RECONFIGURATION OF EUROPEAN UNION SECURITY: INSTITUTIONAL DYNAMICS AND STRATEGIC RESPONSES, 2022-2025

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Abstract

This article examines migration governance as a strategic field through which the European Union reconfigured important dimensions of its security architecture between 2022 and 2025. It argues that migration should be understood not only as a matter of mobility or humanitarian protection, but also as a strategic factor that has reshaped the institutional, legal, and security architecture of the Union. Drawing on migration studies, European integration theory, and securitisation approaches, the article examines three main dimensions: the coordinated response to the mass displacement caused by Russia's full-scale invasion of Ukraine, centred on temporary protection and the Strategic Compass; the changing configuration of migration routes, operational risks, and data-driven forms of monitoring, including the growing role of EU agencies; and the legal-institutional consolidation introduced by the Pact on Migration and Asylum.

The analysis shows that migration has contributed to a shift from ad hoc crisis management to a more centralised, securitised, and multi-level governance framework. At the same time, it highlights a persistent tension between human security and hybrid-threat management, with important implications for solidarity, border control, and the protection of fundamental rights within the European Union. The study is carried out within the national initiative "SENREMO-The National Security of the Republic of Moldova in the Context of EU Accession" and Jean Monnet Chair "EU's role in the emerging international system".

Keywords: European Union security; migration governance; securitization; temporary protection; Pact on Migration and Asylum, hybrid threats

Introduction

After the migration crisis of 2015-2016, the European Union remained for several years in a state of limited reform capacity in the field of asylum and migration. Political deadlocks between Member States prevented the adoption of a comprehensive reform of the Common European Asylum System, despite the proposals of the Juncker Commission. However, the large-scale invasion of Ukraine by the Russian Federation in February 2022 acted as a strategic catalyst, transforming forced migration and population mobility into central factors for the EU's security, both internally (institutional resilience, pressure on asylum and social

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protection systems) and externally (the instrumentalization of flows by state and non-state actors, hybrid pressure routes).

The Strategic Compass for Security and Defence (March 2022) explicitly anchored these developments in the Union's strategic culture, identifying the instrumentalization of migration at external borders as a form of hybrid threat and underlining the need to strengthen integrated border management, information exchange and societal resilience. This provides a common thread for the 2022–2025 period: migration is no longer just an object of internal policies, but also a "testing ground" for the EU's capacity to act as a security pole, in the logic of a "Security Union".

The objective of this article is to examine how migration governance contributed to the reconfiguration of European Union security between 2022 and 2025, with particular attention to the institutional dynamics and strategic responses through which migration became embedded in the Union's evolving security architecture, based on *three sets of documents*: (1) strategic instruments and political narratives (Strategic Compass, von der Leyen Commission narrative on "managing migration responsibly"); (2) the new normative framework of the Pact on Migration and Asylum, in particular Regulation (EU) 2024/1351 on asylum and migration management; (3) the mid-term training needs assessment (EU-STNA 2022–2025), which indicates how security practices and cooperation between EU agencies are adapting to new challenges.

Theoretical-Methodological Framework: Definition, Typologies and Legal Substantiation

Analysing migration governance as a factor in the reconfiguration of European Union security requires a theoretical and methodological framework that combines migration studies, theories of European integration, and securitisation approaches. In this perspective, migration is understood not only as cross-border mobility of people, but as a set of demographics, economic, political and normative processes that reconfigure, in the long term, the institutions and security practices of the EU. In the specialized literature, migration designates the cross-border movement of people, accompanied by the intention of temporary or permanent residence, generated by a combination of "push-pull" factors (conflicts, persecutions, economic crises, demand for labour, educational opportunities, etc.). In the European context, the concept of "migration policy" is complemented by that of "migration governance", which includes not only legal norms and EU institutions, but also implementation networks, agreements with third countries and informal practices of "remote control" of mobility[1].

Niemann et al. distinguish between the EU's "internal migration policy" (the set of rules on internal and external border control, asylum, legal immigration and return) and the EU's "external migration policy", which aims to manage migration flows in relation to countries of origin and transit, through conditionality instruments, readmission agreements, mobility partnerships and the use of development aid for migration control purposes[2]. The concept of "EU migration governance" thus designates the set of formal and informal

[1]Sandra Lavenex, *The Europeanization of Refugee Policies: Normative Challenges and Institutional Legacies: of Common Market Studies,* "Wiley Blackwell", Vol. 39/5, pp. 851-874, December, 2001, DOI:10.1111/1468-5965.00334, https://ideas.repec.org/a/bla/jcmkts/v39y2001i5p851-874.html (23.11.2025)

[2] Arne Niemann, Natascha Zaun, *Introduction: EU external migration policy and EU migration governance: introduction. Journal of Ethnic and Migration Studies,* Vol. 49/12, 2023, pp. 2965–2985, https://doi.org/10.1080/1369183X.2023.2193710 (23.11.2025)

instruments that structure the interaction between the EU, its Member States and third countries in managing mobility, under an increasingly pronounced security agenda.

Securitisation approaches highlight the constructed nature of migration as a "threat", but in order to be analytically meaningful, this perspective must be linked to observable policy outcomes. In the European Union context (2022–2025), the framing of migration as a security or hybrid threat is not limited to discourse, but translates into differentiated legal regimes and operational practices. For instance, the designation of certain flows as "instrumentalised" or high-risk justifies the expansion of border procedures, accelerated asylum processing, and increased use of detention or return mechanisms. Conversely, the categorisation of displaced persons from Ukraine as beneficiaries of temporary protection enabled immediate access to residence, labour markets, and social services, bypassing standard asylum procedures[1]. This divergence illustrates that securitisation operates through selective policy activation, producing differentiated treatment across migrant groups depending on geopolitical context, origin, and perceived risk. In this sense, securitisation in the EU does not uniformly restrict mobility, but redistributes rights and constraints unevenly, embedding hierarchy within migration governance.

A fundamental distinction is between *forced migration*, associated with refugees and applicants for international protection (mainly regulated by asylum law and the CEAS framework) and *voluntary migration*, which includes labour migration, family reunification, migration for studies or humanitarian reasons. This distinction is found in the separation of competences in the TFEU, where art. 78 concerns a common policy on asylum and subsidiary protection, and art. 79 concerns legal immigration of third-country nationals[2].

The second distinction concerns the legal status of mobility: *regular migration* – carried out on the basis of legal titles (visa, residence or work permit, refugee status or subsidiary protection); *irregular migration*, entry or stay without a legal title, a category that also includes situations in which the person loses their right to stay (*overstayers*) or is rejected in asylum procedures. In his analysis of "*unwanted immigration*", Zaun defines this central category for EU policies as flows of asylum seekers/refugees and irregular migrants, i.e. those forms of spontaneous immigration, difficult to control and over which states have limited or no legal obligations[3]. *Asylum seekers* who arrive spontaneously are initially treated as "irregular migrants" until they submit their application for protection, and in case of rejection they become irregular again, which explains the integrated treatment of these categories within the new Pact on Migration and Asylum.

A third distinction concerns the duration and form of mobility: *temporary or circular migration* (including seasonal workers or mobility programmes); long-term or permanent migration, which involves socio-economic integration and access to extended rights. Niemann et al. note that, despite the political discourse on the need for "legal pathways", the EU has developed few real channels of legal migration for *non-high-skilled* categories, with the emphasis on *circular migration* and mobility partnerships, often conditional on

[1] Steven Blockmans, Crosson Macchiarini, *The EU's Strategic Compass: A Guide to Reverse Strategic Shrinkage?*, March 31, 2022, CEPS Policy Insight, March 2022, https://ssrn.com/abstract=4136255 (24.11.2025)

[2] Tratatul privind funcționarea Uniunii Europene (versiune consolidată). Jurnalul Oficial al Uniunii Europene, 26.10.2012, C 326/47, https://eur-lex.europa.eu/resource.html?uri=cellar:2bf140bf-a3f8-4ab2-b506-fd71826e6da6.0001.02/DOC_2&format=PDF (25.11.2025)

[3] Natascha Zaun, *Externally driven integration in EU migration policy: enabling integration through indifference, undermining it through conflictive politicisation, "*Journal of European Public Policy", 2025, pp. 1-28, https://doi.org/10.1080/13501763.2025.2565214 (24.11.2025)

readmission agreements[1]. The literature on political and media discourse presents a discursive typology of migration, in which the same category of people can be framed either as "refugees" (victims of war), or as "economic migrants" or "irregular migrants", with direct effects on the legitimacy of security measures and the availability of public solidarity[2]. This dimension is crucial for understanding the mechanisms of securitisation and the way in which migration is perceived as a structural risk.

At the same time, critical scholarship on EU migration governance emphasises processes of externalisation and differentiated protection. Externalisation refers to the shifting of migration control beyond EU borders through cooperation with third countries, conditionality, and capacity-building measures, often with limited oversight of human rights standards. Differentiated protection highlights the unequal distribution of rights and access to protection based on nationality, route, and geopolitical context. Together, these perspectives challenge the assumption of a coherent and uniformly applied EU migration regime, instead pointing to a stratified system in which security considerations shape both territorial and legal boundaries of protection. In this article, migration governance is understood as a strategic field through which migratory pressures, legal responses, and institutional adaptation have contributed to the reconfiguration of the European Union's security architecture. Building on Zaun's analysis, migration, especially in the form of "unwanted immigration" - can be understood as a catalyst of accelerated integration when rising flows and the perception of loss of control increase its political salience within the European Union[3].

The reconfiguration of European Union security through migration governance can be observed across at least three interrelated dimensions: institutional, legal-normative, and strategic-security: 1) *Institutional dimension* - strengthening the competences of EU agencies (Frontex, EUAA), alongside an expansion of their operational autonomy and influence over national decision-making. While this development enhances coordination and capacity, it also raises persistent concerns regarding accountability, transparency, and compliance with fundamental rights. The growing role of agencies in areas such as return operations, border screening, and asylum support creates a complex distribution of responsibility, in which operational practices are increasingly Europeanised, but legal accountability often remains formally national[4]. 2) *Legal-normative dimension* - moving from a fragmented framework, dominated by directives and minimum standards, to a set of directly applicable regulations, harmonising procedures, qualification criteria and solidarity mechanisms and strengthening the role of common obligations in migration control; this is the expression of deeper integration in core state powers, as conceptualised by Genschel and Jachtenfuchs[5]. 3)

[1] Arne Niemann, Natascha Zaun, *Introduction: EU external migration policy and EU migration governance: introduction.* "Journal of Ethnic and Migration Studies", Vol. 49/12, 2023, pp. 2965–2985, https://doi.org/10.1080/1369183X.2023.2193710 (20.11.2025)

[2] Bastian Vollmer, *Policy Discourses on Irregular Migration in the EU - 'Number Games' and 'Political Games'.* "European Journal of Migration and Law", Vol. 13/3, 2011, pp. 317-339, https://doi.org/10.1163/157181611X587874 (28.11.2025)

[3] Natascha Zaun, *Externally driven integration in EU migration policy: enabling integration through indifference, undermining it through conflictive politicisation*, "Journal of European Public Policy", 2025, pp. 1–28, https://doi.org/10.1080/13501763.2025.2565214 (27.11.2025)

[4] Evangelia Lilian Tsourdi, *The New Screening and Border Procedures: Towards a Seamless Migration Process?,* "Policy Study". June 2024, https://d1xp398qalq39s.cloudfront.net/content/FEPS-Policy_Study_-_The_New_Screening_and_Border_Procedure_-_DP_66__9_.pdf (27.11.2025)

[5] Philipp Genschel, Markus Jachtenfuchs, *From Market Integration to Core State Powers: The Eurozone Crisis, the Refugee Crisis and Integration Theory,* "JCMS: Journal of Common Market Studies", Vol. 56 (1), 2018, pp. 178–196, https://doi.org/10.1111/jcms.12654 (24.11.2025)

Strategic security dimension - the explicit inclusion of migration and the instrumentalisation of migratory flows in the EU's security documents (Strategic Compass, hybrid threat assessments)[1], where migration is treated as a vector of geopolitical pressure and as an element of a broader strategic competition involving state and non-state actors.

Methodologically, the article analyses this process by correlating developments in the normative framework, institutional consolidation, and discursive shifts in strategic documents and institutional assessments across the period 2022-2025. In this vein, migration is treated not merely as a security concern, but as a domain of governance that reshapes institutions, redistributes competences, and redefines the normative logic of security within the European Union. The legal framework of migration in the European Union is multi-layered and results from the interaction between primary law, the specific asylum and migration acquis, international refugee law and fundamental rights protection standards. At the level of primary law, Articles 77–80 TFEU define the shared competence of the EU in the field of external border control, asylum and immigration, within the area of freedom, security and justice, and enshrine the principle of solidarity and the fair sharing of responsibility among Member States (Art. 77-80 TFEU)[2].

At the level of secondary legislation, the period 2022–2025 was marked by the adoption of the New Pact on Migration and Asylum, which substantially reforms the Common European Asylum System. Its core is represented by Regulation (EU) 2024/1351 on Asylum and Migration Management (AMMR)[3], which replaces Dublin III and establishes a permanent, binding but flexible solidarity mechanism. It is complemented by Regulation (EU) 2024/1348 on the Common Asylum Procedure; Regulation (EU) 2024/1347 (Qualification Regulation)[4], Directive (EU) 2024/1346 on reception conditions, Regulation (EU) 2024/1358 on Eurodac, as well as Regulations (EU) 2024/1349 (return procedure) and 2024/1356 (screening at external borders)[5], which strengthen the early screening and border control component. These instruments are articulated with the previous architecture, the Schengen Borders Code, the European Border and Coast Guard (Frontex) Regulation, the Return Directive 2008/115/EC and the Temporary Protection Directive 2001/55/EC, creating an integrated legal infrastructure in which migration is treated simultaneously as a matter of protection, mobility and security. From this perspective, the expansion and densification of the acquis, the strengthening of EU agencies (Frontex, EUAA) and the institutionalisation of a permanent solidarity mechanism indicate that migration governance has become a central

[1] *The Strategic Compass of the European Union*, https://www.strategic-compass-european-union.com/ (25.11.2025)

[2] Tratatul privind funcționarea Uniunii Europene (versiune consolidată). Jurnalul Oficial al Uniunii Europene. 26.10.2012, C 326/47, https://eur-lex.europa.eu/resource.html?uri=cellar:2bf140bf-a3f8-4ab2-b506-fd71826e6da6.0001.02/DOC_2&format=PDF (28.11.2025)

[3] *Regulation (EU) 2024/1351 of the European Parliament and of the Council of 14 May 2024 on asylum and migration management, amending Regulations (EU) 2021/1147* and *(EU) 2021/1060 and repealing Regulation (EU) No 604/2013*, OJ L, 2024/1351, 22.5.2024, http://data.europa.eu/eli/reg/2024/1351/oj (28.11.2025)

[4] *Regulation (EU) 2024/1347 of the European Parliament and of the Council of 14 May 2024 on standards for the qualification of third-country nationals or stateless persons as beneficiaries of international protection, for a uniform status for refugees or for persons eligible for subsidiary protection and for the content of the protection granted, amending Council Directive 2003/109/EC and repealing Directive 2011/95/EU of the European Parliament and of the Council*. PE/70/2023/REV/1. OJ L, 2024/1347, 22.5.2024, http://data.europa.eu/eli/reg/2024/1347/oj (29.11.2025)

[5] *Regulation (EU) 2024/1356 of the European Parliament and of the Council of 14 May 2024 introducing the screening of third-country nationals at the external borders and amending Regulations* (EC) No 767/2008, (EU) 2017/2226, (EU) 2018/1240 and (EU) 2019/817. PE/20/2024/REV/1. OJ L, 2024/1356, 22.5.2024, http://data.europa.eu/eli/reg/2024/1356/oj (29.11.2025)

factor in the reconfiguration of European Union security: a shift from ad hoc "crisis" management to an increasingly centralised, securitised and multi-level governance of migration.

To clarify the causal relationship between migration governance and the reconfiguration of European Union security, this article identifies three main mechanisms. First, *functional spillover*, whereby increased migratory pressures necessitate enhanced coordination, leading to the expansion of EU agencies and operational capacities. Second, *legal-institutional consolidation*, through which crises create political incentives for adopting binding regulations that deepen integration in areas traditionally controlled by Member States. Third, *securitising framing*, which legitimises the use of exceptional measures and integrates migration into broader security strategies, including hybrid threat frameworks. Together, these mechanisms explain how migration governance acts not merely as a policy domain, but as a driver of structural transformation in the EU's security architecture.

The Year 2022: Strategic Shock and Coordinated Institutional Response

The year 2022 can be interpreted as a "strategic shock" for European security, in which Russian aggression against Ukraine combined geopolitical and demographic dimensions, generating the largest influx of displaced persons on the continent since 1945. Within just a few months, millions of people arrived in EU+ states under different forms of protection, and almost one million lodged asylum applications, placing national systems under a level of pressure comparable to the peak of the 2015–2016 crisis[1]. The central EU regulatory response was the activation, for the first time, of Directive 2001/55/EC on temporary protection[2], through Council Implementing Decision (EU) 2022/382. This instrument established a temporary protection regime for Ukrainians, reflecting a logic of human security: it ensured rapid access to the right to residence, work, education and social services, while avoiding the blockage of asylum systems by diverting a substantial part of the flow to a special legal channel[3]. Thus, temporary protection functioned simultaneously as a mechanism for the protection of individuals and as an institutional valve, "relieving" pressure on the Common European Asylum System and providing a framework for rapid solidarity between Member States.

One illustrative contrast emerges when comparing the implementation of temporary protection for displaced persons from Ukraine with the treatment of other groups arriving at the EU's external borders during the same period. While Ukrainian nationals benefited from immediate legal status, access to labour markets, and relatively low levels of administrative filtering, reports from border regions such as the Eastern Mediterranean and Western Balkans indicate continued use of restrictive practices for other nationalities, including informal containment, limited access to asylum procedures, or prolonged waiting times at border facilities. This empirical divergence highlights that the operationalisation of EU migration

[1] European Union Agency for Asylum, *Asylum Report 2023: Annual Report on the Situation of Asylum in the European Union,* https://euaa.europa.eu/asylum-report-2023 (27.11.2025)

[2] *Directiva 2001/55/CE a Consiliului din 20 iulie 2001 privind standardele minime pentru acordarea protecției temporare, în cazul unui aflux masiv de persoane strămutate, și măsurile de promovare a unui echilibru între eforturile statelor membre pentru primirea acestor persoane și suportarea consecințelor acestei primiri*. JO L 212, 7.8.2001, pp. 12–23, http://data.europa.eu/eli/dir/2001/55/oj (27.11.2025)

[3] *Council Implementing Decision (EU) 2022/382 of 4 March 2022 establishing the existence of a mass influx of displaced persons from Ukraine within the meaning of Article 5 of Directive 2001/55/EC, and having the effect of introducing temporary protection*. OJ L 71, 4.3.2022, pp. 1-6, http://data.europa.eu/eli/dec_impl/2022/382/oj (28.11.2025)

governance is not uniform, but contingent upon political prioritisation and perceived security relevance.

Strategically, 2022 also marks a "hybrid-security turn" in EU security policy, crystallised by the adoption of the Strategic Compass for Security and Defence[1], which defines Russia's aggression as a "tectonic shift" and explicitly anchors migration and the instrumentalization of flows of people in the register of hybrid threats, alongside cyberattacks and pressures on critical infrastructure[2]. The compass establishes a close migration-border-resilience link, advocating for more rigorous coordination between Justice and Home Affairs (JHA) instruments, asylum, return, integrated border management, and Common Security and Defence Policy (CSDP) instruments, including through civilian missions and increased cooperation with Frontex and the EUAA.

The key message for 2022 was the shift from *ad hoc* crisis management to a set of coordinated exceptional mechanisms. On the one hand, the temporary protection regime created a framework of "automatic" solidarity, with the distribution of displaced persons based on national capacities and dedicated European funding[3]. On the other hand, the strengthened role of the European Union Agency for Asylum (EUAA) in the early monitoring of pressures on asylum systems and in the development of warning and risk-analysis tools reinforced the Union's early-warning capacity. In parallel, inter-agency cooperation (EUAA, Frontex, Europol) has intensified, from operational support at the border to the exchange of information on trafficking networks and hybrid threats, illustrating a new practice of inter-agency tasking at EU level.[4] However, this operational intensification has also been accompanied by sustained criticism from civil society and academic literature regarding the opacity of decision-making processes and the limited mechanisms for judicial and democratic oversight. In particular, the involvement of agencies such as Frontex in border management and return operations has generated debates on the attribution of responsibility in cases of alleged rights violations.

Researchers Zaun and Trauner interpret the issue of migration within the EU at this time as a "window of opportunity" for externally induced integration: the cumulative pressure of "unwanted immigration" and geopolitical shock have created strong incentives to accelerate the reform of the Common European Asylum System and to advance the New Pact on Migration and Asylum[5]. In terms of the theory of European integration, the year 2022 can be characterised as a moment of consolidation of EU-level integration in migration and

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[1] *The Strategic Compass of the European Union*, https://www.strategic-compass-european-union.com/ (29.11.2025)

[2] Steven Blockmans, Crosson Macchiarini, Dylan and Paikin Zachary, *The EU's Strategic Compass: A Guide to Reverse Strategic Shrinkage?*, March 31, 2022, "CEPS Policy Insight", March 2022, https://ssrn.com/abstract=4136255 (29.11.2025)

[3] *Council Implementing Decision (EU) 2022/382 of 4 March 2022 establishing the existence of a mass influx of displaced persons from Ukraine within the meaning of Article 5 of Directive 2001/55/EC, and having the effect of introducing temporary protection.* OJ L 71, 4.3.2022, pp. 1-6. http://data.europa.eu/eli/dec_impl/2022/382/oj (30.11.2025)

[4] Steven Blockmans, Crosson Macchiarini, Dylan and Paikin Zachary, *The EU's Strategic Compass: A Guide to Reverse Strategic Shrinkage?*, March 31, 2022, "CEPS Policy Insight", March 2022, https://ssrn.com/abstract=4136255 (29.11.2025)

[5] Natascha Zaun, *Externally driven integration in EU migration policy: enabling integration through indifference, undermining it through conflictive politicisation.* "Journal of European Public Policy", 2025, pp. 1-28. https://doi.org/10.1080/13501763.2025.2565214 (30.11.2025); Trauner, F., Wolff, S. *The impact of the Russian war against Ukraine on the reform of the common European asylum system*, "European Politics and Society", Vol. 26/4, 2024, pp. 797–813 https://doi.org/10.1080/23745118.2024.2435401 (30.11.2025)

security as domains linked to core state powers, in which the EU more clearly assumes the functions of a security provider for its citizens and for the persons under its protection[1].

Migration in the EU's Strategic Compass (2022)

The Strategic Compass explicitly inserts migration into the "threat landscape" by including the instrumentalization of irregular migration flows in an inventory of hybrid strategies used by state and non-state actors, alongside economic coercion, cyberattacks and disinformation campaigns. The Compass underlines that the "instrumentalization of irregular migration flows" is part of the "new world of threats" against which the EU must defend itself, within the framework of the Secure pillar of the Strategic Compass.[2] Recent doctrinal analyses interpret this formulation as an evolution of the securitisation of migration towards a framework of hybrid threats, in which migration is deliberately used to create pressure at borders and internal political tensions.

This framing has concrete policy implications. The identification of migration as a hybrid threat has facilitated the expansion of preventive and deterrence-oriented instruments, including enhanced border surveillance, cooperation with third countries to contain flows, and the prioritisation of rapid screening over full procedural guarantees in certain cases. As a result, threat construction is directly linked to a shift in the balance between protection and control, particularly for groups associated with irregular or politically sensitive routes. In terms of instruments, the Compass foresees the development of an EU Hybrid Toolbox and Hybrid Rapid Response Teams, designed as a coordinated framework that brings together preventive, cooperative, restrictive and recovery measures against hybrid campaigns. This toolbox is to provide Member States and CFSP/CSDP missions with a wide range of civilian and military instruments, allowing rapid interventions, including in situations of migratory pressure on the external border[3].

Researcher García Andrade mentions that according to the Strategic Compass, migration becomes a common field of action for both Justice and Home Affairs (JHA) instruments and Common Security and Defence Policy (CSDP) missions, by using foreign policy missions to strengthen border control, combat migrant smuggling and increase the capacities of third states[4]. This configuration has a structural significance: the Compass aligns the internal security and external action of the EU in an integrated *migration-borders-resilience* framework. Internally, the focus is on the protection of critical infrastructure and the interoperability of information systems, as part of the same response to hybrid threats in which migration is a central vector. Externally, the CSDP is called upon to support migration management through civilian and military missions in the proximity spaces, in particular in the Mediterranean and the Sahel, which confirms the trend of "security externalisation" of

[1] Philipp Genschel, Markus Jachtenfuchs, *From Market Integration to Core State Powers: The Eurozone Crisis, the Refugee Crisis and Integration Theory,* "JCMS: Journal of Common Market Studies", Vol. 56/1, 2018, pp. 178–196 https://doi.org/10.1111/jcms.12654 (01.12.2025)

[2] Mariana Gkliati, *Let's Call It What It Is: Hybrid Threats and Instrumentalization as the Evolution of Securitisation in Migration Management,* https://www.europeanpapers.eu/europeanforum/lets-call-it-what-it-is-hybrid-threats-and-instrumentalisation (01.12.2025)

[3] Kenneth Lasoen, *Realising the EU Hybrid Toolbox: Opportunities and Pitfalls,* "Clingendael Policy Brief", December 2022, https://www.clingendael.org/sites/default/files/2022-12/Policy_brief_EU_Hybrid_Toolbox.pdf (01.12.2025)

[4] Andrade Paula García, *Tackling Migration Externally Through the EU Common Foreign and Security Policy: A Question of Legal Basis,* "European Papers-A Journal on Law and Integration", No.2, 2023. pp. 959-984, https://www.europeanpapers.eu/system/files/pdf_version/EP_eJ_2023_2_SS2_4_Paula_Garcia_Andrade_00696.pdf (02.12.2025)

migration policies. Overall, the Strategic Compass characterises migration as a hybrid threat managed through exceptional but coordinated mechanisms, clarifying the roles of EU agencies, CSDP missions and Member States in the European security architecture.

From a critical perspective, this external dimension can also be understood as a form of migration control at a distance, whereby responsibilities for containment are partially delegated to third countries. While this may reduce immediate pressure at EU borders, it raises concerns regarding accountability, the protection of migrants' rights outside EU territory, and the long-term sustainability of such arrangements. At the level of border practices, this structural pressure translates into differentiated implementation patterns. In several Mediterranean entry points, accelerated border procedures have been applied systematically to certain nationalities, with limited access to legal assistance and compressed timelines for asylum decisions. At the same time, capacity constraints in reception systems have led to overcrowding and delays in registration, creating de facto barriers to accessing protection. These implementation gaps demonstrate that the effectiveness of the EU's governance framework is mediated by national administrative capacities and local conditions, producing uneven outcomes across the Union.

2023–2025: Data, Routes and Operational Risks of Migration Flow in the EU

In the period 2023-2025, the migration regime to the European Union is characterised by a structurally high level of asylum applications, combined with a gradual decrease in irregular crossings and a diversification of routes. According to the EUAA, the EU+ registered "around one million" asylum applications in 2024 for the third consecutive year, a decrease of around 11% compared to 2023, while around 4.4 million displaced persons from Ukraine continued to benefit from temporary protection, which maintains pressure on national asylum and reception systems and leads to a near-record number of cases pending at first instance[1].

At the external borders, estimates from the Organization for Economic Co-operation and Development and data from the European Border and Coast Guard Agency show that irregular crossing peaked in 2023 (around 380,000 cases)[2], before falling by more than a third in 2024 to around 240,000[3], and further falling by around a fifth in the first nine to ten months of 2025 to around 130,000-150,000 crossings[4], indicating lower but persistent pressure on some key routes. The decline is significant on some routes, notably the Western Balkans route, while other maritime and land routes remain volatile, reflecting the ability of smuggling networks to adapt to changes in policy and control. This development is relevant for security for at least two reasons. Firstly, it shows that reinforced border control measures, cooperation with transit states and the "route-based approach" have measurable effects on the volume of irregular crossings, but without eliminating the pressures. Secondly, the numerical decrease does not necessarily mean a reduction in risks, but criminal networks are diversifying their methods, which increases the relevance of training policies and police

[1] EUAA, *Latest Asylum Trends 2024*, *Annual Analysis*, https://euaa.europa.eu/publications/latest-asylum-trends-2024-annual-analysis (02.12.2025)
[2] FRONTEX, *Significant rise in irregular border crossings in 2023, highest since 2016,* https://www.frontex.europa.eu/media-centre/news/news-release/significant-rise-in-irregular-border-crossings-in-2023-highest-since-2016-C0gGpm (02.12.2025)
[3] FRONTEX, *In Brief,* https://www.frontex.europa.eu/2024-in-brief/ (03.12.2025)
[4]FRONTEX, *EU external borders: irregular crossings fall 22% in the first 10 months of 2025,* https://www.frontex.europa.eu/media-centre/news/news-release/eu-external-borders-irregular-crossings-fall-22-in-the-first-10-months-of-2025-XvrGB3 (04.12.2025)

cooperation, reflected in the EU-STNA 2022–2025[1]. At the same time, Mediterranean routes remain very active, with a record level of arrivals in the Canary Islands in 2024, while the configuration of flows is changing rapidly depending on regional conflicts and visa regimes[2].

These aggregate trends, however, conceal a deeply asymmetric territorial distribution of pressure. Germany remains the main destination country in absolute terms, but in 2024 the Mediterranean border states - notably Cyprus and Greece - registered over 7,000 asylum applications per million inhabitants, three times the EU+ average[3]. MedMA analyses based on Eurostat data show that while in the first quarter of 2025 the EU-27 recorded a 23.5% decrease in the number of first-time asylum seekers compared to the same period in 2024, the MED5 group of countries (Greece, Italy, Spain, Cyprus, Malta) experienced a 78% increase, with increases of over 60–90% in Spain, Greece and Italy[4]. The result is a picture in which migration pressure is not uniform, but concentrated on certain "border states" and on certain maritime or land routes, which amplifies tensions regarding responsibility and intra-EU solidarity.

From a security perspective, this combination of high volumes, volatile routes and uneven spatial pressure transforms migration into a multidimensional operational risk. Importantly, this risk-based framing is not neutral. Migrants arriving via routes associated with smuggling networks or geopolitical tensions are more likely to be channelled into accelerated border procedures or return mechanisms, while others benefit from more favourable protection regimes. This demonstrates how risk categorisation, informed by securitisation logics, produces differentiated access to rights and procedural safeguards within the EU system.

States with limited institutional capacity at the border simultaneously face overloading of reception infrastructures, difficulties in processing applications within a reasonable time and increased vulnerabilities to infiltration by organised crime networks or political exploitation of flows. The Strategic Compass explicitly qualifies the instrumentalization of migration by state and non-state actors as a form of hybrid threat, in which flows of people are manipulated to create political, economic or societal pressure on the EU and its Member States.[5] Recent analyses of the "*militarised governance*" of migration in the Mediterranean show that the European response has often been dominated by logics of security and operational control, with increased recourse to coercive means and security cooperation with third states[6].

The main consequence is the shift from ad hoc crisis management to a structural risk-management regime, focused on data and flexible capabilities. On the one hand, tools such as the European Union Agency for Asylum's early warning system and new interoperable IT

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[1] CEPOL, *European Union Strategic Training Needs Assessment 2022-2025. Mid-term review,* https://www.cepol.europa.eu/api/assets/media/downloads/2023/eu-stna_mid-term-review_november-2023.pdf (04.12.2025)

[2] MedMA, *Mediterranean Migration & Asylum Policy Hub. 2025. Asylum Data: Beyond the EU Average. Policy notes*, 24 September 2025, https://med-ma.eu/publications/asylum-data-beyond-the-eu-average/ (04.12.2025)

[3] EUAA *Asylum applications down by 23% in the first half of 2025*, https://euaa.europa.eu/news-events/asylum-applications-down-23-first-half-2025 (04.12.2025)

[4] MedMA, *Asylum Data: Beyond the EU Average. Sep 24, 2025,* https://med-ma.eu/publications/asylum-data-beyond-the-eu-average/ (05.12.2025)

[5] *The Strategic Compass of the European Union*, https://www.strategic-compass-european-union.com/ (06.12.2025)

[6] Merve Kinacioglu, *Militarized Governance of Migration in the Mediterranean,* "International Affairs", Vol. 99 (6), 2023, pp. 2423–2443, https://www.researchgate.net/publication/375521132 (06.12.2025)

architectures (reformed Eurodac, EES/ETIAS systems, data exchange via EU-LISA) allow for near real-time monitoring of arrival routes and profiles, facilitating the operational redeployment of resources and scenario planning[1]. On the other hand, the "flexible solidarity" mechanisms and operational tools, rapid border intervention teams, EUAA expert deployments, Frontex's capacity to deploy additional officers and technical means, are designed precisely to compensate for the uneven nature of migratory pressure and to reduce the room for manoeuvre of actors seeking to exploit flows. In the logic of the article, this evolution marks a decisive step towards a structured, highly technological and securitised governance of migration. However, this apparent stabilisation should be treated with caution: the routinisation of tools such as accelerated procedures, continuous monitoring, and emergency-based flexibility mechanisms suggests not only greater coordination, but also the gradual normalisation of exceptional measures within everyday governance practices.

The EU Pact on Migration and Asylum (2024–2026)

The adoption in May 2024 of the legislative package of the EU Pact on Migration and Asylum marks the transition from a stalled reform of the Common European Asylum System (CEAS) to a coherent legal and institutional architecture, focused on border control, fast-track procedures and a permanent solidarity mechanism. The new rules, which entered into force on 11 June 2024, will become applicable after a two-year transition period, so that the Pact will be fully operational from 2026.[2] In the terms of Genschel and Jachtenfuchs, this represents the strengthening of the integration of "*core state powers*" in the field of migration and asylum - a step from market logic to the integration of control, coercion and public administration powers[3].

The Pact on Migration and Asylum is part of a long process of reform of the CEAS, which began after the 2015 refugee crisis, when the European Commission's proposals were blocked by North–South and East–West divisions around the redistribution of asylum seekers.[4] Zaun's analyses of "externally driven integration" shows that the deadlocks in the Council were only overcome when external pressures, in particular the instrumentalisation of migration by state and non-state actors, made the cost of inaction higher than the cost of further integration[5]. Russia's war against Ukraine and the rapid activation of the Temporary Protection Directive created a new political configuration. Researcher Trauner demonstrates that the management of the flow of Ukrainian refugees favoured a more consensual mode of governance and allowed the Commission to link the debate on the Pact to the need for robust instruments against the "instrumentalization of migration as a hybrid threat[6]. In this context, the Pact on Migration and Asylum emerges as a result of the convergence between a security

[1] EUAA, *Latest Asylum Trends 2024-Annual Analysis,* https://euaa.europa.eu/publications/latest-asylum-trends-2024annual-analysis (07.12.2025)

[2] *Pact on Migration and Asylum. A common EU system to manage migration,* https://homeaffairs.ec.europa.eu/policies/migration-and-asylum/pact-migration-and-asylum_en (06.12.2025)

[3] Philipp Genschel, Markus Jachtenfuchs, *From Market Integration to Core State Powers: The Eurozone Crisis, the Refugee Crisis and Integration Theory,* "JCMS: Journal of Common Market Studies", Vol. 56/1, 2018, pp. 178–196, https://doi.org/10.1111/jcms.12654 (07.12.2025)

[4] *Idem*

[5] Natascha Zaun, *Externally driven integration in EU migration policy: enabling integration through indifference, undermining it through conflictive politicisation,* "Journal of European Public Policy", 2025, pp. 1–28, https://doi.org/10.1080/13501763.2025.2565214 (07.12.2025)

[6] Florian Trauner, *The impact of the Russian war against Ukraine on the reform of the Common European Asylum System.* "European Politics&Society", Vol. 26/4, 2025, pp. 797-813, https://doi.org/10.1080/23745118.2024.2435401 (08.12.2025)

agenda (control, prevention of secondary movements, crisis response) and the maintenance, at least at the declarative level, of protection standards for persons in need[1].

The EU Pact on Migration and Asylum (2024) comprises ten legislative instruments, seven of which are essential for the governance of migration and asylum: the Asylum and Migration Management Regulation (AMMR – Regulation (EU) 2024/1351), the Common Asylum Procedure Regulation (CPR – 2024/1348), the Qualification Regulation - 2024/1347, the Reception Conditions Directive (2024/1346), the new Eurodac Regulation (2024/1358), the Border Screening Regulation (2024/1356) and the Border Return Procedure Regulation (2024/1349). These acts can be analytically grouped into *four pillars*:

a) Border screening and accelerated procedures. The screening regulation introduces a standardised pre-entry stage for all third-country nationals arriving irregularly or seeking international protection at the border. Within a few days, authorities must carry out identity, security and health checks, assess vulnerabilities, and decide whether to direct the person to either the asylum procedure or the return procedure. The data collected are entered into Eurodac, which becomes an extended register of all categories of migrants, including those to be returned, interconnected with other European databases in the logic of IT interoperability. The common asylum procedure regulation consolidates the accelerated and border procedures, allowing for the rapid rejection of applications considered inadmissible (e.g. coming from "safe third countries") and directly linking the refusal of asylum to the activation of the return procedure at the border. Critical literature draws attention to the fact that this "normalisation of the exception" risks transforming the exception to the common law of asylum into a rule for categories considered high-risk or coming from certain routes[2].

b) Solidarity and responsibility-sharing mechanism. The AMMR Regulation replaces the old Dublin III and establishes a "binding but flexible" solidarity mechanism. Member States will be obliged to contribute annually to a "solidarity basket", but they can choose the form of their contribution: relocation of applicants or beneficiaries of protection, financial contributions, operational support or capacity-building measures in states under pressure. Although the mechanism aims to reduce asymmetries of pressure on states of first entry, analyses show that effective redistribution will depend on the political will of states and on how the Commission uses the new Annual Migration Management Cycle to identify "capacity gaps" and mobilise solidarity resources. In Zaun's terms, integration is once again "externally determined": the pressure of crises and the threat of the instrumentalization of migration by hostile actors lead states to accept a more advanced form of burden-sharing, but only as long as it remains flexible and reversible[3].

c) Protection standards and reception conditions. The reform of the Qualification Regulation and the recast of the Reception Conditions Directive aim to standardise the criteria for granting refugee status and subsidiary protection, as well as the content of associated rights (access to work, education, integration). The official objective is to reduce the "attractiveness" of national differences and limit secondary mobility, but NGOs draw

[1] European Commission, *Common Implementation Plan for the Pact on Migration and Asylum, COM (2024) 251 final*, https://eur-lex.europa.eu/resource.html?uri=cellar:1d7a409a-2948-11ef-929001aa75ed71a1.0001.02/DOC_1&format=PDF (10.12.2025)

[2] Vasiliki Apatzidou, *Bordering Asylum: Examining the EU's Border Procedures under the Asylum Procedures Regulation (EU) 2024/1348*, "International Journal of Refugee Law", Vol. 37/2, 2025, pp. 201–218, https://doi.org/10.1093/ijrl/eeaf014 (12.12.2025)

[3] Natascha Zaun, *Externally driven integration in EU migration policy: enabling integration through indifference, undermining it through conflictive politicisation,* "Journal of European Public Policy", 2025, pp. 1–28, https://doi.org/10.1080/13501763.2025.2565214 (12.12.2025)

attention to the risk of standardisation being directed downwards, by setting a minimum acceptable level of rights, rather than by converging towards the highest existing standards.

d) Management of crisis and force majeure situations. The Crisis and Force Majeure Regulation (2024/1359) and the Border Return Procedure Regulation extend derogation and flexibility instruments in favour of the Member States. In situations classified as a "crisis" or "instrumentalization of migration", states can extend procedural deadlines, expand the application of border procedures and resort to more intensive detention. Critical analyses highlight the risk that such instruments institutionalise a permanently exceptional governance, in tension with fundamental rights obligations. In this respect, the Pact does not simply manage crises, but institutionalises the conditions under which crisis logics can be repeatedly invoked. This blurs the boundary between normal and exceptional governance, raising the possibility that emergency measures become embedded as standard instruments of migration control.

The entry into force of the package on 11 June 2024 was followed by the adoption of a Joint Implementation Plan, which sets out the milestones and responsibilities for the transition period 2024–2026. Member States must adapt their legislation, create interoperable IT infrastructure, develop the capacities of national agencies and prepare solidarity mechanisms (relocation, financial contributions, staff reserves). The European Commission coordinates this process through the Annual Migration Management Cycle and through bilateral dialogues with the states, in a logic of structured surveillance similar to the European Semester. Early indications from the implementation phase also point to potential gaps between formal commitments and practical capacity. Member States differ significantly in their ability to operationalise screening procedures, ensure adequate reception conditions, and deploy the required administrative and technical infrastructure. This raises the possibility that, despite formal harmonisation, the Pact may reproduce existing asymmetries, with frontline states continuing to bear disproportionate operational burdens.

The 2026–2027 window is crucial because it coincides with the transition from the temporary protection regime for displaced persons from Ukraine - extended until March 2026 - to long-term solutions: integration, other forms of residence or voluntary return. In practice, states will manage simultaneously the application of new accelerated procedures and return mechanisms at the border while gradually exiting an exceptional humanitarian protection regime. This overlap tests the institutional and political capacity of the Pact to function not only as a response to crises, but as a stable system for the governance of mobilities.

From the perspective of migration governance as a factor in the reconfiguration of European Union security, the Pact produces at least *four lasting effects*: (1) *Strengthening the border control infrastructure and data interoperability*. Screening, the expansion of Eurodac and the interoperability of IT systems connect asylum policies with internal security policies (SIS, EES, ETIAS), transforming migration governance into a subsystem of data governance and hybrid risk management. (2) *Institutionalising solidarity and responsibility-sharing as a dimension of "core state power".* The solidarity mechanism of the AMMR transfers, at least partially, the financial and political costs of asylum from border states to the entire bloc, which represents an additional step in the integration of redistributively sensitive policies. 3) *Normalising exceptional governance.* The possibility of repeatedly activating crisis regimes, accelerated procedures and returns at the border creates the risk that the logic of exception becomes structural, especially on routes considered "instrumentalised" by hostile actors. This may increase tensions between security objectives and fundamental rights commitments. 4) *Reconfiguring the role of European agencies*. Frontex and the EUAA become central pillars of the implementation of the Pact: the former through border operations and returns, the latter

through operational support in asylum procedures and vulnerability assessment. At the same time, the expanded role of agencies raises unresolved questions about legal responsibility and fundamental rights compliance. The increasing operational involvement of Frontex in border control and returns, as well as the EUAA's influence on asylum procedures, creates a hybrid system in which decision-making is formally national but substantively shaped by EU-level actors. This fragmentation complicates accountability, particularly in situations involving alleged violations of non-refoulement, access to asylum, or detention standards. As a result, the consolidation of agencies as central pillars of migration governance must be understood not only as a capacity-enhancing development, but also as a source of institutional ambiguity and normative risk.

Overall, the Pact on Migration and Asylum is not just a technical reform of the CEAS, but a structural reconfiguration of the way the European Union understands the relationship between mobility, security and solidarity. It anchors migration both in the repertoire of human security - by seeking to provide stable frameworks for protection, and in the repertoire of hybrid threat management, through screening, interoperability and crisis response tools. Depending on how it is implemented in the period 2024-2026, the Pact can strengthen both the Union's institutional resilience and the public perception of its legitimacy in managing migration.

Conclusions

The analysis of developments in the period 2022–2025 demonstrates that migration and asylum have become structurally embedded in the European Union's security architecture, no longer as episodic disruptions but as constitutive elements of governance through which institutional authority, legal competences, and strategic priorities are redefined. The Russian Federation's invasion of Ukraine functioned as a critical juncture, accelerating integration and enabling the adoption of instruments, temporary protection, the Strategic Compass, and the Pact on Migration and Asylum, that collectively signal a transition from reactive crisis management to a more permanent, systematised framework of migration governance.

However, this transformation should not be interpreted uncritically as a linear progression toward greater coherence or effectiveness. Rather, the emerging framework reveals a set of internal tensions and unresolved contradictions that call into question both its sustainability and its normative foundations. While the article has shown that migration governance operates across institutional, legal, and strategic-security dimensions, a closer examination suggests that integration in these domains is uneven, politically contingent, and in some respects fragile.

At the institutional level, the expansion of EU agencies such as Frontex and the European Union Agency for Asylum reflects an increasing centralisation of operational capacity. Yet this shift raises important questions regarding accountability and democratic oversight. The growing reliance on technical expertise, data infrastructures, and inter-agency coordination risks depoliticising inherently political choices about admission, protection, and return, while simultaneously diffusing responsibility between EU and national levels. In this sense, the apparent strengthening of EU capacity may coexist with a dilution of clear lines of accountability.

At the legal-normative level, the move from directives to directly applicable regulations under the Pact on Migration and Asylum is often presented as evidence of deeper integration in core state powers. Nevertheless, this harmonisation may mask a downward convergence in protection standards, particularly where accelerated border procedures and

expanded use of "safe country" concepts become routinised. The increasing normalisation of derogations under crisis and instrumentalization frameworks suggests a potential reconfiguration of asylum law in which exceptional measures risk becoming standard practice. These dynamic challenges the assumption that legal integration necessarily reinforces fundamental rights.

The most significant tension emerges at the strategic level, where migration is simultaneously framed within two competing logics: human security and hybrid threat management. The rapid and generous activation of temporary protection for displaced persons from Ukraine illustrates the EU's capacity for solidaristic, protection-oriented responses when political consensus exists. In contrast, the consolidation of migration as a vector of hybrid threats has legitimised the expansion of surveillance, deterrence, and externalisation measures in other contexts. This selective application of protection raises critical questions about the consistency and universality of EU norms, suggesting that solidarity remains contingent on geopolitical, racialised, or strategic considerations rather than anchored in a stable normative framework.

Moreover, the increasing reliance on data-driven governance and interoperability of large-scale IT systems introduces new forms of power and potential blind spots. While these tools enhance anticipatory capacity and operational coordination, they also risk reinforcing a technocratic approach in which complex social and humanitarian phenomena are reduced to categories of risk management. Such a shift may obscure the lived realities of migrants and limit the space for rights-based or protection-centred policy alternatives.

Finally, the external dimension of EU migration governance - particularly cooperation with third countries and the externalisation of border control - remains under-theorised in terms of its long-term implications. While effective in reducing certain migratory flows, these strategies may generate dependency on fragile or authoritarian partners, displace rather than resolve migratory pressures, and expose the EU to new forms of geopolitical vulnerability. In this sense, the very instruments designed to enhance security may produce unintended forms of insecurity.

Taken together, these dynamics suggest that the reconfiguration of European Union security through migration governance is not simply a story of increased capacity and coherence, but one of contested integration marked by trade-offs between efficiency, sovereignty, and normative commitments. The framework that has emerged after 2022 is robust in its institutional design and operational reach, yet its legitimacy will depend on how these tensions are managed in practice.

A more analytically grounded assessment therefore requires moving beyond the assumption that securitisation and integration are inherently stabilising. Instead, the findings of this article indicate that the sustainability of the EU's migration-security nexus will hinge on its ability to reconcile three competing imperatives: maintaining effective control of borders and flows, ensuring meaningful access to protection and fundamental rights, and preserving political cohesion among Member States. Failure to balance these dimensions risks not only policy inefficiency but also the erosion of the EU's normative credibility as a security and values-based actor.

In this light, migration governance should be understood not only as a tool for strengthening the European Union's security architecture, but also as a critical site where the limits, contradictions, and future trajectory of European integration are actively negotiated.

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BETWEEN ETHNIC MARGINALISATION AND FREEDOM. UNDERSTANDING SECESSIONIST AGITATION IN THE SOUTHEAST, NIGERIA

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Abstract

Freedom is ingrained in human history, and when it is threatened, humans usually improvise ways to safeguard it. One of such ways is to fight or build a resilient mechanism to properly adjust to the threat. This study examined ethnic marginalisation-secession linkage in the context of Southeast Nigeria. Previous studies have focused on collective memory of lost war, ideology and systemic exclusion. While these causes are outgrowths of marginalisation, they were limited in their focus on specific measures that empirically test marginalisation. This study drew its data strengths from the pool of secondary sources, including government reports, newspapers, articles, books and archival records.

The study found that three strands of marginalisation influenced secessionist agitations in the region: political, economic, and social. The study therefore recommends a sovereign regional conference that will bring together critical stakeholders, including representatives of government, international bodies, youth, traditional rulers, civil society, and the media, for a roundtable discussion on issues of marginalisation, sincere solutions, and committed implementation. The critical role of the region's political elites in light of entrenched socio-economic backwardness was also recommended.

Keywords: ethnic marginalisation; freedom; Nigeria; secession; Southeast

Introduction

The secessionist agenda in the Southeast, Nigeria, is one of the burning issues in the national discourse, not least because it led to the first-ever civil war in Nigeria. While historical, it appears to have intensified in the post-independence period, as reflected in the daily casualties, wilful destruction and enforced disappearances recorded across the region, following virulent and persistent confrontation between the separatists and the Nigerian authorities. For instance, Amnesty International reported that between 2021 and 2023 alone, 1,844 lives were lost in a clash mainly between the state and non-state actors[2]. The state's inability to manage the situation has not only led to a frightening security crisis in the region but also created opportunities to be exploited by different violent groups to advance their individual and group agendas, often separate from the broader secessionist struggle. For instance, the environment has contributed to the rise and proliferation of armed groups, including the Indigenous People of Biafra (IPOB) and its security wing, the Eastern Network,

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[2] Amnesty International, *Nigeria: A Decade of Impunity: Attacks and Unlawful Killings in South-East Nigeria,* 2025, https://www.amnesty.org/en/documents/afr44/9363/2025/en/ (12.11.2025)

the Unknown Gunmen, and the state-backed paramilitary outfit commonly referred to as the "Ebube Agu"[1].

Previous studies have focused on a range of intersecting causation factors, such as the collective trauma of the loss of the civil war[2], Nigeria's systemic and structural complexities, which determine who is excluded and included[3] and the state's repressive inclination[4]. For instance, Opara and Amadi situated the re-emergence of Pro-Biafran secessionist agitation within the context of structural, historical and political legacies of the Nigerian Civil War. Drawing comparatively from secessionist struggles globally, the authors maintained that only a strategic recalibration would address the crisis.[5] Nwangwu observed that harassment, arrests, killings, abductions, proscription, torture and extraordinary rendition are responsible for the resurgent Biafran agitation.[6] While these perspectives identify vital mediating dynamics, they paid little or no attention to the fundamental role of marginalisation as a driver of secessionism, particularly when examined through the lens of the pool of documentary evidence.

The relationship between marginalisation and secession is well established in both theory and international legal discourse. International instruments, such as the United Nations Charter and the African Union Charter[7], recognise rights to secession, particularly in regard to oppression and domination, from which marginalisation is derived. For instance, Article 20(1) of the African Charter on Human and Peoples' Rights (the African Charter) stipulates that "all peoples shall have (the) right to existence. They shall have the unquestionable and inalienable right to self-determination"[8]. Article 20(2) further states that "colonized or oppressed people shall have the right to free themselves from the bonds of domination by resorting to any means recognized by the international community"[9]. These provisions underscore the nexus between systemic marginalization and secession, while situating secession within the broader context of resistance to internal and external domination and oppression.[10] Within the global context, the increasing wave of secessionist agitations in countries such as Crimea, Catalonia, Kosovo, and the Southern Cameroon and South Sudan, reflects the enduring significance of these provisions. While some have attained statehood

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[6] *Idem*

[7] African Union, *Protocol to the African Charter on Human and Peoples' Rights on the Establishment of an African Court on Human and Peoples' Rights*, 1981, https://au.int/sites/default/files/treaties/36390-treaty-0011_-_african_charter_on_human_and_peoples_rights_e.pdf (9.11.2025)

[8] *Ibidem*, p.6

[9] *Ibidem,* p.6

[10] Alex. C. Ekeke, *The Right to External Self-Determination of the South-East People of Nigeria: A View from International Law*, "Journal of African Law", Vol. 69, 2025, pp. 441–457

(for instance, South Sudan, Kosovo, Eritrea), others are yet to (for example, the Biafran agitation in Southeast Nigeria, Catalonia, Crimea and Southern Cameroon).

This study investigates the ethnic marginalization-secession nexus in the context of the Biafran agitation in Southeast Nigeria. It makes a case that while the wave of secession is not peculiar to Southeast Nigeria alone (for example, it also sweeps through the Southwest and South-South among Ogoni people and Igbo-speaking Deltans), its virulence has continued to produce an existential threat to residents in Southeast, observers and the Nigerian state. Methodologically, the study adopts a descriptive survey research design that prioritises data from secondary sources, such as published articles, books, newspapers and organisational reports. Theoretically, a just-cause or remedial theory of secession is deployed to demonstrate how marginalisation, which produces grave injustices, political exclusion, systemic discrimination and repressive tendencies, triggers the secessionist agenda in the South East, Nigeria. The strength of the study rests on its capacity to contribute to the growing scholarship on global secessionism, with particular focus on how marginalisation can influence secessionist struggle beyond the popular discourse of the previous loss of war, the quest for resource control, the collective trauma of past events and the expansion of ideology.

The Context

The region known as Southeast Nigeria (commonly referred to as the Igboland by its inhabitants) can be contextualised from geographic, economic and political dimensions. Geographically, the Southeast region is one of Nigeria's six geopolitical zones. It comprises five states: Imo, Anambra, Enugu, Abia, and Ebonyi. The region occupies a strategic location, given that it is bounded by the River Niger (the largest river in West Africa and the third-longest in Africa) on the West, the Cross River to the east, the flat North Central to the north, and the riverine Niger Delta to the south.

Ethnically and linguistically, the Southeast is predominantly Igbo. The region covers about 76,358 km2 and has an estimated population of 22 million people[1]. According to Okali, Okpara and Olawoye[2], about 70 per cent of the population of the region lives in rural areas. As a result, it is known for the production of key agro-products such as palm oil, yams, cassava, maize, rice and cocoyam. Some of these products, particularly yams, have a cultural symbol that depicts strength, wealth, prosperity and identity, as reflected in the annual cultural celebration of *Iri Iji* (New Yam Festival) in most parts of the region[3]. The zone is also rich in mineral resources, such as crude oil, iron and tin, which explains the complexity of the secessionist agenda and the state's response to address it.

Economically, the people of the region are also known for entrepreneurial skills. Nnewi, one of the commercial hubs in Anambra State, is often regarded as the "Japan of Africa" due to its vibrant commercial and trading networks.[4] However, the entrepreneurial skills have not significantly translated to human development outcomes, as poverty, unemployment, and hunger remain persistent challenges. For instance, evidence suggests that

[1] The Guardian, *Only 7m of South East's 22m Population with NINs*, 2022, https://guardian.ng/technology/only-7m-of-south-easts-22m-population-with-nins/ (10.11.2025)

[2] David Okali; Enoch Okpara; Janice Olawoye, *Profile of South-Eastern Nigeria and Description of the Study Area,* United Kingdom, International Institute for Environment and Development, 2001, p.12

[3] James N. Nnoruga, *The Preservation of Agricultural Heritages: A Prerequisite Factor Towards Economic Nationalism in the South-East of Nigeria*, "Aku", Vol. 5, No. 2, 2024, pp. 59-69

[4] The Guardian, *Nnewi's Manufacturing Sector's Potential as the 'Japan of Africa'*, 2024. https://guardian.ng/opinion/nnewis-manufacturing-sectors-potential-as-the-japan-of-africa/ (10.11.2025)

the region recorded the highest unemployment rate among Nigeria's geopolitical zones in 2023 at 9.03%, followed by the South-South at 7.24%, and the Southwest at 5.07%, while the northern zones recorded lower rates. This suggests a disproportionate employment distribution in Nigeria, with the Southern zones, particularly the Southeast, disproportionately affected[1].

While the broader Nigerian socio-economic challenges could be blamed for the disproportionate development outcomes, the significant impact of insecurity, particularly the enforcement of the Monday sit-at-home, cannot be overemphasized. Evidence has suggested that between 2020 and 2025, the region lost approximately N7.6 trillion, in addition to systemic disruption in education, governance and livelihoods. Commercial hubs, like Onitsha main Market, one of the largest markets in Africa, have been forced into closures, resulting in lost transactions and business uncertainties for both traders and consumers. Attempts at resisting compliance with the order have often led to grave human rights violations, with reports indicating hundreds of casualties linked to enforcement-related clashes[2].

Politically, the Southeast region is the only region which has engaged in a civil war (popularly known as the Biafran War) with the Nigerian government. The conflict claimed many lives on both sides of the Biafran people and the Nigerian state. The war was driven by a complex combination of colonial legacy, inter-ethnic rivalry and the leadership dynamics of key figures, such as Late Chief Odumegwu Ojukwu (the leader of the Biafran nation) and Yakubu Gowon (the Nigerian Head of State). As a result, any mention of the Igbo or Southeast not only resonates a consciousness of a people once branded rebellious for seeking a separate state for themselves, but also a people who strive for freedom from a persecuting state, depending on one's perspective[3]. The combination of these geographic, economic and political markers reinforces the ethnic marginalization of the region, thereby providing a robust understanding of the subsequent sections that support the narrative of marginalization-secession linkage in the Southeast region.

Ethnic Marginalization, Freedom and Secession: A Conceptual Linkage

Ethnic marginalization typifies a distinct yet significant form of exclusion beyond other socio-demographic categories, such as gender, religion, occupation, and class. To fully grasp the concept, it is important to disaggregate it into two components: ethnic and marginalization. The term 'ethnic' or simply 'ethnicity' refers to a group of people who identify with one another based on shared history, ancestry, language, religion and traditions.[4] In other words, ethnicity is deeply embedded in human association and identity. Though socially constructed, it fosters in individuals and groups a sense of belonging, interaction, communication and acceptance. While every person naturally has an ethnic affiliation, when it is politicized, it assumes a stereotypical dimension, reinforcing inclusion and exclusion, and providing fertile ground for ethnic conflicts and wars.[5]

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[1] Agora Policy, *Highlights of Nigeria's Latest Labour Force Reports*, 2024, https://agorapolicy.org/our-blogs/189-highlights-of-nigerias-latest-labour-force-reports.html (10.11.2025)

[2] *Idem*

[3] Faluyi O. Temitope, Samuel K. Okunade, Ebenezer O. Oni, Leo O. Asumu, *Interrogating the Secession Struggle of Biafra in Nigeria Within the Context of the Agitation and Emergence of South Sudan*, "Bandung", Vol. 13, No. 1, 2026, pp. 46-72

[4] Donald L. Horowitz, *Ethnic Groups in Conflict*. University of California Press, 1985, p. 53

[5] Rehana S. Hashmi; Gulshan Majeed, *Politics of Ethnicity: A Theoretical Perspective*, "A Research Journal of South Asian Studies", Vol. 30, No.1, 2015, pp. 319-331

On the other hand, marginalization, according to Verma and Gayathri.[1], rests on the principle of exclusion, whereby individuals or communities are deprived of their rights due to endogenous (ethnicity, gender, religion, linguistic) and exogenous factors (poverty, geographical location, lifestyle, history). Both sets of factors combine to reinforce varying degrees of deprivation. Chandler and Munday[2] defined marginalization as a process of social exclusion in which individuals or groups are pushed to the margins, denied economic, political or symbolic power. Andersen adds that marginalization must be understood from both perspectives: that of the marginalized and those who marginalize.[3] Therefore, ethnic marginalization can be broadly described as the political, social, and economic exclusion of an ethnic group based on endogenous and exogenous factors, to the extent that it is regarded as an 'outsider'.

Freedom is a core human rights principle, globally recognised in the *Universal Declaration of Human Rights (UDHR)* (1948)[4] and enshrined in national constitutions. In Nigeria, Article IV of the 1999 Constitution (as amended) guarantees rights, such as freedom of expression, assembly, association, movement, and religion[5]. Haller describes freedom as the most essential basic political value, equally vital in personal, social, and economic life. Its essentiality explains the revolutions recorded throughout history, suggesting the centrality of freedom to human existence. Three strands of freedom are often highlighted:

- Democratic freedom (Kantian moral autonomy): This component argues that people are free when they are self-governing and subject to rules they establish for themselves by reason rather than outside influences or their own wants.[6] This requires a public legal framework that ensures every citizen's equal freedom to be "masters of themselves" by being liberated from the capricious will of others.[7] In order to provide this equal freedom, the state must ensure that citizens are held responsible for their behavior and moral character.
- Economic-liberal: This component is rooted in liberal thought. It stresses individual liberty, private ownership of property and minimal state intervention in the economy. It emphasizes a free market economy whereby individuals are allowed to pursue their own economic interests. This would engender harmony through efficient allocation of resources.[8]

[1] Geeta Verma, S. Gayathri, *Marginalisation, Inclusion and Empowerment - Understanding the Relationship and Processes in Lives of Girls,* Proceedings of INTCESS14- International Conference on Education and Social Sciences Proceedings, 3-5 February 2014- Istanbul, Turkey, 2014

[2] Daniel Chandler, Roy Munday, *A Dictionary of Media and Communication*, Oxford University Press, 2011

[3] Martin B. Andersen, *Unraveling the Patterns of Marginalization: Four Quantitative Studies on Students' Experience of Social Marginalization in Danish Public Schools*, Aalborg Universitetsforlag, 2023, https://doi.org/10.54337/aau561775934 (12.11.2025)

[4] United Nations, United Nations Declaration of Human Rights (UDHR), 1948, https://www.un.org/en/about-us/universal-declaration-of-human-rights (8.11.2025)

[5] Nigeria, 1999 Constitution of the Federal Republic of Nigeria, 1999, https://nigeriarights.gov.ng/files/constitution.pdf (8.11.2025)

[6] Immanuel Kant, *Grounding for the Metaphysics of Morals*, in Immanuel Kant, *Ethical Philosophy*, James W. Ellington (trans.), Hackett Publishing Co, Indianapolis, IA, 1785, 1983

[7] Edward Demenchonok, *Learning from Kant: On Freedom*, "Revista Portuguesa de Filosofia", Vol. 75, No.1, 2019, pp. 191–230

[8] Omar Hernandez, *Economic Freedom and Prosperity: A History of Liberal Thought and Its Institutional Impact*, 2024, http://dx.doi.org/10.2139/ssrn.5118247 (3.11.2025)

- Socialist freedom: It emphasizes positive liberty, linking freedom to human happiness and self-organization in both personal and economic life.[1] Instead of focusing only on the lack of external restraints (negative liberty), it views freedom as necessitating social ownership of the means of production to permit true individual and communal self-determination. It relates freedom to the corporate capacity of a society to govern its own conditions, such as the livelihood of workers.[2] [3]

While these philosophic foundations offer distinct perspectives regarding the concept of freedom, they, however, emphasize the compelling importance of constitutionalism, liberty, autonomy and self-determination as the nitty-gritty of human existence. In the context of ethnic relations, 'freedom' extends beyond individual civil liberties, to include collective political freedom, whereby a group participate collectively in governance, exercises the right to interact and demand equal access to national patrimony. This analytical distinction is vital because secessionist movements rarely emerge from socio-economic dissatisfaction. Instead, it stems from perceived exclusion, profiling, and unequal treatment. While ethnicity is a social construct that carries no significant value beyond identification, it assumes an exclusionary dimension when dignified with power. In such situations, grievances become politicized, and the state's legitimacy may become eroded.

In the context of Southeast Nigeria, due to perceived institutional and systemic injustices, freedom has been framed as not just the enjoyment of constitutional rights, but the capacity of a people to exercise meaningful political agency, preserve collective dignity and influence decisions affecting their common existence. Secession, therefore, is not just a separation, but a commitment to address lost autonomy, systemic domination and entrenched exclusion. Thus, the connection between freedom and secession transcends philosophical premises to include institutional and political dimensions. In the context of ethnic marginalization, freedom is denied, and basic human rights are deprived.[4] It contrasts with the aphorism that 'all human beings are born free and equal in dignity and rights". Against this backdrop, the denial of political freedom serves as a critical analytical capsule between ethnic marginalization and secessionist mobilization

Secession is a contested concept despite its centuries-long practice[5]. While definitions vary, consensus on its core elements remains elusive, and theories continue to emerge to explain the causes and implications of secession. Rodríguez-Pose and Stermše perceived secession as a fashion[6]. Pavković traces the word 'secession' to the Latin word "secessio", meaning "to go away" or "depart", first used in 494 BCE to describe the withdrawal of the Roman people from the senate and the city of Rome to the Sacred Mount. In contemporary usage, Pavkovic defines secession as a withdrawal (detachment) of territory and its people from an existing state[7]. Shikova sees secession as a political movement aimed at a specific

[1] Paul Raekstad, *Freedom, Socialism, and Property-Owning Democracy*, "Journal of Applied Philosophy", Vol. 39, No. 4, 2022, pp. 664-681
[2] Kandalla Balagopal, *What Is "Socialist Freedom"?* "Economic and Political Weekly", Vol. 24, No. 31, 1989, pp. 1761-1763
[3] Max Haller, *Freedom,* in *Radical Values: The Interests of People and Their Social-Political Implementation, Springer*, Wiesbaden, 2025
[4] Aret Karademir, *Butler and Heidegger: On the Relation between Freedom and Marginalization*, "Hypatia", Vol. 29, No.4, 2014, pp. 824-839
[5] Natalija Shikova, *The Phenomenon of Secession,* in *Self-Determination and Secession*, Springer, 2023
[6] Andres Rodríguez-Pose, Marko Stermšek, *The Economics of Secession: Analysing the Economic Impact of the Collapse of the Former Yugoslavia*, "Territory, Politics, Governance", Vol. 3, No.1, 2015, pp. 73–96
[7] Aleksandar Pavković, *Secession,* In Mortimer Sellers; Stephan Kirste (Eds.), *Encyclopedia of the Philosophy of Law and Social Philosophy*, Springer, Dordrecht, 2023

population within a defined territory seeking to establish itself as a new independent state[1]. This definition, though simple, captures a complex phenomenon that has continued to test the sovereignty of nations globally.

In a separate study, Shikova contends that secession possesses unique dynamics. Secessionists will attempt to persuade their target group that the state they currently inhabit is alien, promising enhanced protection from injustice, greater political influence, and increased economic resources in their own state. In the context of Southeast Nigeria, secessionists nurture hopes for improved representation should the secession materialize, given the region's abundant human and natural resources[2]. Yet, as Shinkova rightly notes, such calculations are frequently irrational and may lead to depression, trauma and regret when unrealized. Moreover, once demands for secession are articulated, secessionists typically seek external support, shifting their international efforts toward legitimizing their cause. The parent state, however, employs various strategies to counter secessionist movements, often with backing from the international community[3].

Ker-Lindsay outlines six reasons why the parent country opposes secessionism: emotional connection to the land; displacements of populations within their own territory; financial considerations; historical and cultural significance; apprehension regarding additional secession; and national pride[4]. The economic consequences of secession can be very severe. Bari et al. discovered that the secession of South Sudan resulted in approximately a 72.00% increase in food prices in Sudan, jeopardizing national food security.[5] Similarly, Reynaerts and Vanschoonbeek argue that secession can reduce the GDP of the parent state by as low as 20%[6].

It is important to note that marginalization, as used in this paper, does not merely refer to feelings of dissatisfaction or relative deprivation, but it denotes a persistent and deliberate pattern of structural exclusion, visible in the contexts of political representation, resource allocation, public institutions and national power configurations. This distinction is necessary because not all socio-economic grievances produce reverse feelings of secessionist agitations. Secessionist movements occur when a group perceives structural and systemic deprivation that makes equal participation and representation practically difficult. In the context of Southeast Nigeria, secessionist tendencies are reinforced by empirical structural indicators, such as disparities in access to executive power, social belonging and interaction, state creation, local government distribution, infrastructure development and resource allocation. These conditions transform ordinary grievance into a collective feeling of exclusion.

Furthermore, the concept of freedom as used in the paper moves beyond just liberty to emphasize collective political freedom. It deliberately moves beyond theoretical illuminations as provided by democratic, liberal, and socialist thinkers, to a more practical premise of the capacity of a people to fully participate in the political affairs of a nation, freely relate with others and determine their socio-political destiny without structural, systemic, and/or institutional constraints. By this, freedom is not just individual civil liberties, but collective

[1] Shikova, *Op.cit.,* p.101
[2]Natalija Shikova, *The Dynamics of Secession,* in *Self-Determination and Secession*, Springer, 2023, pp.109-132
[3] *Ibidem*, p.109
[4] James Ker-Lindsay, *Understanding State Responses to Secession*, "Peacebuilding", Vol. 2, No.1, 2014, pp.28-44
[5] Abdul Bari, Khalid Bin Kamal, Mohammad Osman Gani, Ghulam Dastgir Khan, Mohammad Ajmal Khuram, Shamsul Hadi Shams, *Exploring the Impact of Secession on Food Prices: A Case Study of Sudan,* "Agricultural and Food Economics", Vol. 13, No.52, 2025, p.1
[6] Jo Reynaerts, Jakob Vanschoonbeek, *The Economics of State Fragmentation: Assessing the Economic Impact of Secession, "*Journal of Applied Economics", Vol. 37, No.1, 2022, pp. 82–115

inclusion that strengthens the sense of 'self' or 'selves' within a national political geography. The denial of such a collective inclusion creates political and psychological conditions for secessionist tendencies to sprout and undermines the state's legitimacy to provide inclusive governance. Secessionist mobilization, therefore, becomes an alternative political project aimed at reclaiming self, autonomy and dignity amid perceived injustices.

Generally, the ethnic marginalization-freedom-secession nexus, therefore, presents a complex case that merits detailed study. Freedom, as a core component of human existence, embodies equality and individual liberty and is protected by national laws. Conversely, issues of grave injustice, oppression and human rights abuses threaten individual or group freedom to exist or associate with others within or outside national boundaries, thereby linking ethnic marginalization to secession. While the latter may have profound socio-economic consequences for both the seceding and the parent states, such costs may not deter agitation, since nothing can be equated to freedom, the force that reignites a sense of *self*, whether in-group or out-group.

Theoretical Underpinning

Several theories explore the cause, conditions, and implications of secession. Buchanan classified the theories into two broad categories: Primary Right theories and the Remedial Right Only Theories. Primary Right theories contend that a group has a general right to secede even in the absence of grave injustice, provided certain conditions are fulfilled.[1] The paper adopts the Just-cause or remedial theory of secession to demonstrate how marginalisation, rooted in grave injustices, political exclusion, systemic discrimination and repressive tendencies, triggers the secessionist agenda in Southeast Nigeria. The Key proponent of this theory is Allen Buchanan, alongside associated scholars such as Wayne Norman, George Kyris and Maurice Brisland. The theory holds that secession is a *last resort*, justified only when a group's fundamental rights have been severely violated, and all other avenues for redress have failed. In other words, the theory argues that a group has a right to secede in response to oppression, unlike other theories such as Primary right" or "Choice" theories and Plebiscitary" theories, which argue that a group can secede without prior injustice or oppression. As Pérez and Sanjaume rightly note, remediless place the burden of proof of secession on the secessionists[2].

Norman, however, contends that instead of remedial or just-cause secessions, secessionists should pursue a constitutional right of secession, given that it may be a difficult task to determine who qualifies for a just because that requires an arbitrator. A constitutional right of secession, though demanding, such as requiring a majority referendum, may provide a clearer legal pathway.[3] Buchanan counters that constitutional provisions are only one possible instrument for an unjustly treated group, and their relevance depends on the specific situation.[4] Other remediless, such as Sunstein, argue that secession belongs only in the domain of moral principles, rather than legal rights. They see secession as a form of resistance that can be justified only when used against an extremely unjust government, much

[1] Allen Buchanan, *Theories of Secession,* "Philosophy & Public Affairs", Vol. 26, No.1, 1997, pp. 31-61
[2] Lluís Pérez; Marc Sanjaume, *Legalizing Secession: The Catalan Case*, "Journal of Conflictology", Vol. 4, No.2, 2013, pp. 3-12
[3] Wayne Norman, *The Ethics of Secession as the Regulation of Secessionist Politics*, in Margaret Moore (ed.), *National Self-determination and Secession*, Oxford University Press, Oxford, 1998
[4] Allen Buchanan, *The Morality of Political Divorce from Port Sumter to Lithuania and Quebec,* Westview Press, Oxford, 1991

like revolution or civil disobedience. However, it should not be "legalized" as an instrument for resistance[1].

Corroborating Buchanan and others, who emphasize the role of geographic, political and social factors, secession in the Southeast region has taken on a forceful tone, due to the Nigerian government's posture over the years. Nigeria, though democratizing, still exhibits vestiges of authoritarianism, long after thirteen years of military rule. In addition to the colonial legacy, the post-military governance has been combative, exclusionary and intolerant of dissenting voices, repressively managing internal security challenges. Thus, the virulence of the secessionist agenda in the Southeast can be understood through the prism of those whose enduring agitation for justice has consistently been met with severe resistance. As subsequent sections demonstrate, the remedial theory has become a tool of last resort after decades of marginalization. While the Nigerian government may dismiss the issue of marginalization of the Southeast, as is always the case, historical and empirical evidence paint a picture of a region that has been treated as an 'outsider' through various legal and institutional processes that undermine its collective sense of self, belonging and freedom of association.

The History of Agitation for Secession in Southeast Nigeria

The provenance of secessionism in Southeast cannot be fully understood without tracing it to colonialism. In fact, much of the identity crisis in Nigeria stems from the activities of the British colonialists, whose main objective was not to develop the already thriving regions but to exploit them for their economic gains. Before they came to Nigeria, communities co-existed in peace and harmony, strengthened and sustained by intercommunal trade, shared norms, cultural exchange and mutual respect. No ethnic group claimed superiority; rather, cultural uniqueness was celebrated as a source of tourism, respect and influence. While communal clashes did occur, they were largely outcomes of sustained interaction and communication, often resolved through customs, traditions, and peacekeeping measures[2]. At this time, ethnicity functioned merely as a mark of identification, while inter-ethnic rivalry was reduced to competition for growth and development. The political systems reflected cultural needs, even though they varied.[3] This rich cultural diversity was disrupted by British colonialists, who replaced and imposed a foreign culture that was rooted in the capitalist ideology of expropriation, accumulation, and unhealthy competition[4].

In 1914, the British government lumped together over 250 distinct cultures into one entity for administrative convenience and economic interest. The retention of existing traditional institutions under the guise of the indirect rule model became a coy to lure the traditional institutions into the extractive colonial capitalist system.[5] [6] Subsequent

[1] Cass R. Sunstein, *Constitutionalism and Secession*, "The University of Chicago Law Review", Vol. 58, No.2, 1991, pp. 633-670

[2] Ejitu N. Ota, Chinyere S. Ecoma, *The Presentness of the Past: Pre-Colonial Inter-Ethnic Relations and the Challenges of National Integration in Contemporary Nigeria*, "Saudi Journal of Humanities and Social Sciences", Vol. 6, No.8, 2021, pp. 277- 284

[3] Victor C. Ebonine, *Secession Bid in the Southeastern Nigeria: Issues and Prospects*, in Ali Farazmand (ed.), *Global Encyclopedia of Public Administration, Public Policy, and Governance*, Springer, Switzerland AG 2021, pp.1-6; Godfrey N. Uzoigwe, *Evolution and Relevance of Autonomous Communities in Precolonial Igboland*, "Journal of Third World Studies", Vol. 21, No. 1, 2004, pp. 139–150

[4] Toyin Falola, *Colonial Societies, in Understanding Colonial Nigeria: British Rule and its Impact,* Cambridge University Press, 2024

[5] Oluwatosin S. Orimolade; Hyacinth N. Iwu, *Explaining the Lineage of Capitalist Development in Nigeria, "*Canadian Social Science", Vol. 12, No.11, 2016, pp. 42-51

constitutional developments, from the Clifford constitution of 1922 to the Lyttleton Constitution of 1954, deepened regional discord, fostering ethnic domination and rivalry. The political parties became regionalized, and politics became zero-sum, rather than variable-sum[1]. Economically, the Southeast embraced the capitalist ideology more vigorously than other regions, due to its early exposure to trade. Olutayo recorded that by 1965, about 200 Igbo entrepreneurs had emerged. In addition, migration sustained this economic prosperity, in 1921, there were 3,000 Igbos in the North; by the year 1931, 12,000; and by 1952, 130,000[2]. In Lagos, they constituted more than half of the total non-indigenous population.[3] The economic prosperity also translated to increased educational enrolments in that by 1952, there were 115 Igbo students compared to 118 Yoruba students. By the year 1959, the Eastern region had a greater number of pupils and teachers at the University College, Ibadan, than any other region. The Igbo also held the highest ranks within the military. In 1964, they held 270 out of 431 senior positions in the Nigerian Railway Corporation; 73 of the 104 senior roles in the Nigerian Ports Authority; and occupied three-quarters of Nigeria's foreign service. They were also the heads of the universities in Ibadan and Lagos.[4] The prosperity elicited resentment, particularly in the North, and even the British suspected that the Southeast region might provide effective leadership after independence in 1960.

Independence intensified ethnic divisions. Notwithstanding, the federal civil service remained meritocratic, with Igbos still dominating, followed by the Yorubas. Fears of domination led to the introduction of the Northernization Policy in the early 1960[s], championed by the Premier Ahmadu Bello[5]. The policy sought to reserve a significant number of positions for the Northerners in the civil service, even if it meant hiring foreign expatriates temporarily, rather than the Southern people. By 1964, the major ranks in the military had been occupied by Southerners, with Major General Aguiyi Ironsi, an Igbo, rising to the rank of General Officer Commanding (GOC). The "Hausa-Fulani political elite, already suspicious of Southern influence, viewed this development with deep anxiety, interpreting it as a form of Igbo overreach into their sociopolitical space"[6].

On 15 January 1966, the first recorded coup in Nigeria presented itself as a 'just cause' to attack the Igbos. Led by a group fronted by Major Chukwuma Kaduna Nzeogwu, the coup targeted major Northern elites, including the Prime Minister, Tafawa Balewa and the Sardauna of Sokoto, Ahmadu Bello, while spearing key Southeastern elites.[7] Barely six months later, the northerners led a counter-coup in July 1966 that brought General Yakubu Gowon to power. Soon afterwards, what appeared as an Igbo pogrom ensued: Men, women

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[6] Ebonine, *Op.cit.,* p.2

[1] Victor C. Ebonine; Tope S. Akinyetun, *From "There Was a Country" to a "Nation Under Siege": Explaining the Oxygenation of Insecurity in Southeast Nigeria*, "Romanian Intelligence Studies Review", Vol. 28, 2022, pp. 35-65

[2] Deborah O. Obor, Emeka E. Okafor, *Social Networks and Business Performance of Igbo Migrant Traders in Ibadan, South-West Nigeria*, "The Nigerian Journal of Sociology and Anthropology", Vol. 12, No.2, 2014, pp. 63-81

[3] Paul Anber, *Modernisation and Political Disintegration: Nigeria and the Ibos*, "The Journal of Modern African Studies", Vol. 5, No.2, 1967, pp.163-179

[4] Onyia, P.C, *Kinship: The Bedrock of African Political System with Particular Reference to the Igbo South Eastern Nigeria,* "International Journal of Social Sciences and Humanities Reviews", Vol. 10, No.1, 2020, pp. 91-99

[5]Jide M. Balogun, *The Route to Power in Nigeria: A Dynamic Engagement Option for Current and Aspiring Leaders,* Palgrave Macmillan, 2009

[6] *Ibidem*, p.5

[7] Lasse Heerten, Dirk A. Moses, *The Nigeria-Biafra War: Postcolonial Conflict and the Question of Genocide,* "Journal of Genocide Research", Vol. 16, No.2, 2014, pp. 169-203

and children were targeted across the Northern states, in their homes, marketplaces, and churches. Properties were destroyed and millions displaced. A conservative estimate put the death toll at about 30,000. survivors fled back to the Southeast without any clothes.[1] The Igbos saw the event as beyond political, but a deliberate attempt at genocide. Mistrust grew, particularly as Yakubu Gowon failed to prosecute perpetrators.

The military Governor of the Eastern Region, Chief Chukwuemeka Odumegwu Ojukwu, decided to leverage his political clout and charisma to declare a separate state of Biafra on May 30, 1967, setting the stage for the first civil war in Nigeria.[2] The declaration was met with jubilation in the Southeast, as Igbos felt it was the only path to liberation, while it was perceived as an insurrection by the Nigerian government. The early stage of the war saw the Biafran forces make significant progress in pushing the Nigerian forces backwards and recording some tactical victories. However, superior military power and economic blockade enabled the Nigerian forces to gain control of the war. The Times of London on August 2, 1968, reported that "the Nigerian forces opened fire and murdered 14 nurses and patients in the wards"[3]. It was also reported that Colonel Adekunle, a Nigerian soldier, said that "(Biafran aid is) misguided humanitarian rubbish …If children must die first, then that is too bad, just too bad"[4].

The war soon began to elicit global sympathy. For instance, France provided humanitarian and military assistance to Biafra, even though it was suspected that it was meant to ward off the Soviet presence and protect its interest in the oil-rich Niger Delta.[5] Meanwhile, countries like Britain, Russia and Egypt provided diplomatic support for Nigeria. The support, alongside the declining infrastructure, resource shortages and internal division in the Biafran ranks, helped the Nigerian forces to consolidate military gains. The end of the war on 15 January 1970 left a feeling of regret among Igbos, as reports claimed that between 1 million and 3 million lost their lives[6].

The Rise of Non-State Actors and Post-Civil War Secessionist Agitation

The collective memory of the loss of the Biafran war and the continued marginalization of the Igbos have given rise to the emergence of non-state actors. At the end of the war, the Nigerian government, in line with its 'no victor, no vanquished' slogan, introduced the 3Rs policy, Reconciliation, Rehabilitation and Reconstruction, as an effort to heal the nation and reintegrate the defeated Igbos into national life. However, the policy was poorly implemented. Those whose property was destroyed were given a paltry 20 pounds as compensation, leaving the people to grapple with their losses. Post-war suffering, compounded by systemic marginalization, as discussed in the next section, fueled secessionist agitation in the region. Unlike the original Biafran movement led by Odumegwu Ojukwu, this new wave was spearheaded by multiple non-state actors with commanding voices.

Ralph Uwazuruike's the Actualisation of the Sovereign State of Biafra (MASSOB) of 1999 was the first of such groups. The group pursued the actualisation of Biafran with

[1] Chinua Achebe, *There Was a Country: A Personal History of Biafra*, The Penguin Press, New York, 2012
[2] Ebonine, *Op.cit.,* p.11
[3] Achebe, *Op.cit.,* p.137
[4] Colin Campbell, *Starvation Was the Policy*, The New York Times, 1987, https://www.nytimes.com/1987/03/29/ books/starvation-was-the-policy.html (10.11.2025)
[5] Oluchukwu I. Onianwa, *1968 French Declaration on Biafra during the Nigerian Civil War: A Historical Analysis, "*Turkish Journal of African Studies", Vol. 2, No. 2, 2025, pp.128-146
[6] Heerten, Moses, *Op.cit.,* p.170

determination. Rather than seek dialogue with the group and address the remote and immediate cause of the renewed agitation, the Nigerian government arrested and prosecuted its leader. This repression spurred the emergence of other groups, including the Biafran Zionist Movement (BZM) and, more prominently, the Indigenous People of Biafra (IPOB) led by Nnamdi Kanu, who has been in the custody of the Nigerian government since 2015[1]. Unlike the original Biafran agitation, these neo-separatist agitators lacked the backing of the regional political elites, probably due to fears of political marginalization, legal implications, and commitment to national cohesion. Their tactics focus on civil disobedience, media campaigns, mass mobilization, and internationalization of the struggle, exploiting popular discontent and historical memory.

Beyond these groups, other militant groups have taken advantage of the growing consciousness to pursue their own agenda. The Unknown Gunmen, often linked to IPOB, have continued to terrorize every part of the region, mostly targeting Nigerian institutions, personnel and property. High-profile victims include Ahmed Gulak, the former special adviser on politics to President Goodluck Jonathan, murdered in Owerri, Imo State, while en route to the airport; Justice Stanley Nnaji, the former judge of the Enugu State High Court, murdered in Enugu; Linus Owuamanam, a well-known businessman, killed in Ibadan; Okiemute Mrere, the Chief Provost of the Nigerian Immigration Service in Imo, killed along Owerri-Port Harcourt Road[2]. Beyond the Unknown Gunmen, the Eastern Security Network (ESN), a security wing of the IPOB, has consistently clashed with the government-backed Ebube Agu security network, leaving residents caught in the crossfire. The Nigerian government has remained indifferent, often employing the divide-and-rule tactic to weaken cohesion among the groups and delegitimize their cause.

Regardless of oppression, the neo-secessionist agitation appears to be enjoying growing popularity and support across the region. Allegations against Nnamdi Kanu include receiving international support from Igbos in diaspora to finance terrorism in Nigeria, highlighting the international dimension of the struggle. Tuki discovered regional disparities in support for secession, Igbos residing in the Southeast show stronger inclinations toward secession than those living elsewhere. This may be attributed to their dependence on the region for livelihood, weaker social ties with other ethnic groups and greater reluctance to accept non-Igbo neighbors compared to their counterparts outside the region[3].

The Political and Socio-economic marginalization and Secession Linkage in Southeast Nigeria

As earlier emphasized, marginalization is the key driver of secessionist agitation in Southeast Nigeria. The marginalization is historical, and manifests across political, economic and social spheres. While colonial marginalization can be debated, primarily due to the economic prosperity the Igbos enjoyed during the period, it was also evident that the colonial governance was designed to favors the North over other regions. For instance, under the Macpherson Constitution, both the North and West had bicameral regional legislatures (the House of Chiefs and the House of Assembly), while the Southeast was restricted to a unicameral House of Assembly legislature. It took sustained agitations by Southeastern representatives in the House of Representatives before the region was allowed to have a

[1] Daniel Tuki, *Regional Differences in Support for Secession Among Members of the Igbo Ethnic Group in Nigeria,* "Nationalism and Ethnic Politics", Vol. 31, No.3, 2025, pp. 425-439
[2] Tope S. Akinyetun, Victor C. Ebonine, Iyase O. Ambrose, *Unknown Gunmen and Insecurity in Nigeria: Dancing on the Brink of State Fragility, "*Security and Defence Quarterly", Vol. 42, No.2, 2023, pp.16–34
[3] Tuki, *Op.cit.,* p. 425

bicameral legislature. This is not to mention the imposition of Warrant Chiefs, who later became tyrants that exploited the colonial system as Court Messengers and Court Clerks[1]. The Civil War marked a turning point in Igbo political and socio-economic history. As previously pointed out, before the war, the Igbos were among the most flourishing ethnic groups in Nigeria due to their exposure to Western education and participation in the import-export economy. Post-war realities entrenched exclusion. A remarkable interview granted by the former Abia State Governor and current serving senator of the Federal Republic of Nigeria, Orji Uzor Kalu, stated thus: "since the civil war, Igbos have not been fairly treated. I don't hide in saying it. Nigerians need to reassure the Igbos and play by the rules so that everyone will be equal and the country can develop. My children came back here, and when they went out to go around, they said, Oh, the way they talk about Igbo people in this country, I say, well, that is what it is. Igbos have not committed an offence. I didn't know how the Civil War started. I didn't know how it ended. And we should forget about that. Look at small Rwanda with all the hatred in that country. You can see the progress they have made. We should be able to leave this tribalism of a thing, leave religion, leave ethnicity. The Igbos have not been forgiven"[2].

From a political standpoint, the region is the only geopolitical zone with five states. While most have six states, the North West has seven states. This disparity also extends to Local Government Areas (LGAs), the North West has 186 LGAs; the South West has 137; the South-South has 125; the North East has 113; the North Central has 112, and the Southeast has 95, barely half the number in the North West.[3] This imbalance reduces the region's revenue allocation, representation in the National Assembly, ambassadorial appointments, the positions in the Federal Executive Council and other institutions. Moreover, despite political leadership alternating between the North and South, the Southeast has largely been limited to ministerial roles or symbolic representation[4].

The most profound example of political exclusion is that no Southeasterner has held the position of President or Vice President since the Civil War. Critics argue that the presidency or vice presidency is contested and not served on a golden plate to any region, suggesting that the region has failed to play its political game as effectively as others. Yet, the Federal Character Principle enshrined in the 1999 Constitution mandates fairness, equity and justice in political representation.[5] Thus, federal appointments must reflect Nigeria's ethnic diversity. More so, there is an informal political arrangement established by political parties called 'zoning.' Zoning is a rotational political arrangement whereby elective positions are distributed based on regions before elections.[6] This arrangement has enabled the North,

[1] John D. Hargreaves, *Colonial Rule in Southern and Eastern Nigeria* [Review of *The Evolution of the Nigerian State: The Southern Phase, 1898-1914.* In Tekena N. Tamuno, Adiele E. Afigbo (Eds.), *The Warrant Chiefs and Indirect Rule in Southeastern Nigeria*, "The Journal of African History", 1973, pp. 512-514

[2] Daily Post, *Igbos Unfairly Treated in Nigeria, Haven't Been Forgiven–Orji Kalu*, 2025, https://dailypost.ng/2025/10/08/igbos-unfairly-treated-in-nigeria-havent-been-forgiven-orji-kalu/ (11.11.2025)

[3] Business Day, *Marginalization of the South East is Much More Than Just "Appoint Me",* 2017, https://businessday.ng/columnist/article/marginalization-south-east-much-just-appoint/ (11.11.2025)

[4] Rotimi Adeforiti, Sunday O. Abang, *No Victor, No Vanquish in the Nigerian Civil War: Analysis of the Recurrent Biafra Separatist Agitation in Southeastern Nigeria,* "Pan-African Journal of Education and Social Sciences", Vol. 5, No. 2, 2024, pp. 28-37

[5] Edmund A. Egboh, Chidozie B. Obiorah, Victor N. Mokwunyei, *Federal Character and Service Delivery in Nigeria.*, "Nnamdi Azikiwe Journal of Political Science", Vol. 42, No.2, 2023, pp. 73–87

[6] Babayo Sule, Usman Sambo, *Power Sharing and Zoning Formula for Managing Nigeria's Diversity: A Case of the Fourth Republic*, "Lentera Hukum", Vol. 9, No.3, 2022, pp. 397-434

Southwest and South-South to produce three, two and one presidents, respectively, while the Southeast has been sidelined[1].

Political marginalization also extends to security institutions. Evidence suggests that the Igbos have produced only one Chief of Army Staff (General Azubuike Ihejirika, appointed by President Goodluck Jonathan) and Inspector General of Police (Ogbonnaya Onovo, appointed by the late President Umaru Yar'Adua). Both faced incessant political interference that undermined their effectiveness. The narrative that Igbos are unwilling to take their military slots seriously has been strongly contested within the region. Many have questioned the sincerity of the army in protecting the interests of the Igbos when enlisted, only to send them to volatile hotspots to be deliberately eliminated by violent armed groups[2].

Economically, the region is home to Nigeria's poor infrastructure. This reality has a historical antecedent. The region was abandoned immediately after the war despite the promise of the 3Rs. Notwithstanding that, through entrepreneurship, self-reliance and commerce, the vanquished (Igbos) were able to rebuild the region. However, these attributes have not translated into significant, region-wide development, as the responsibility for providing such development rests solely with the Nigerian government. Though President Ahmed Tinubu's government has proposed the creation of development commissions for each region, including the Southeast, to address poverty and long-standing infrastructural decay, the initiative has continued to generate mixed reactions. Some have hailed the move as a step in the right direction for the region's resuscitation, while others view it as a political strategy to secure electoral support in the 2027 Nigerian general elections[3]. In addition, some have also questioned the viability and sustainability of the proposed commission in light of the country's current economic challenges. Estimates suggest that the region requires $10 billion annually over the next 30 years to match its infrastructural needs[4].

Despite being the hub of economic activity in Nigeria, the region has some of the worst road infrastructure relative to other parts of the country, an issue that the federal government has also acknowledged.[5] Also, it has no functional seaport, despite being traversed by the River Niger, which would require only sustained and committed dredging. This challenge carries significant economic and logistical implications, including constraints to regional development, increased costs of doing business and reduced competitiveness. The militarization of the region under the guise of fighting insecurity also has a profound economic implication. Evidence has shown that in 2022 alone, the region lost approximately N21.8 billion (approximately $16 million by current exchange rate) to military extortion[6]. One would imagine the significant development impact of such an amount if reinvested in the economy.

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[1] The Nation, *Presidential Poll, Southern States and Zoning,* 2023, https://thenationonlineng.net/presidential-poll-southern-states-and-zoning/ (21.02.2023)

[2] Vanguard, *Igbo Youth and Nigerian Army,* 2025, https://www.vanguardngr.com/2025/04/igbo-youth-and-nigerian-army-by-ochereome-nnanna/ (12.11.2025)

[3] This Day, *The Southeast Development Commission*, 2025, https://www.thisdaylive.com/2025/03/16/the-south-east-development-commission/ (4.11.2025)

[4] Voice of Nigeria, *South-East Dev't Commission Targets $200bn Regional Economy by 2035 – MD,* 2025, https://www.pulse.ng/articles/news/local/south-east-devt-commission-targets-dollar200bn-regional-economy-by-2035-md-2025021217462291641 (4.11.2025)

[5] Daily Post, *South East Roads Worst in the Country - Nigerian Government*, 2017, https://dailypost.ng/2017/11/24/south-east-roads-worst-country-nigerian-government/ (4.11.2025)

[6] Vanguard, *Police, Military Extorted N21.8 bn at Southeast Roadblocks in Two Months–Intersociety*, 2025, https://www.vanguardngr.com/2025/01/police-military-extorted-%E2%82%A621-8bn-at-south-east-roadblocks-in-two-months-intersociety/ (4.11.2025)

Socially, Igbos experience systemic stereotyping, often linked to the legacy of the Civil War, that limits their access to certain infrastructure in Nigeria. They have often been portrayed as social misfits, rebels, and outsiders by other ethnic groups. In the aftermath of the war, Igbos several taunts from the victorious factions, to the degree that some concealed their Igbo identity in public interactions.[1] The most recent event that underscored deep ethnic divide, mistrust and entrenched stereotypes was the 2023 presidential election. The Labor Party (LP) candidate, Peter Obi, an Igbo, gained widespread popularity for his measured engagement with national issues and effective use of social media. which galvanized a large support base, known as "obedient". However, his growing popularity was accompanied by hostile rhetoric, widely interpreted as a calculated strategy to undermine his candidacy. Rabiu Musa Kwankwaso, former Kano governor and presidential candidate, rejected running as Peter Obi's deputy, citing northern resistance to an Igbo president.[2], while reports of threats against Igbos in Lagos deepened their marginalization and fueled secessionist agitation[3].

Internal Elite Failure and Governance Crisis in Southeast Nigeria

It is important to provide a balanced view of marginalization discourse in the region. While it is largely cross-regional, attributing the entire cause to the center oversimplifies a complex political reality in which local elites are also accomplices. This is the view expressed by critics who contend that, despite genuine underrepresentation and neglect of the region, the Southeast political elites have not demonstrated enough leadership commitments, quality and regional cohesion necessary for the region's development. Unlike other regions that have strategically positioned themselves in relation to the politics of the center through political alliances, strategic positioning and consensus, the Southeast regions have continued to triangulate mutual suspicion, political survival and inter-elite rivalry with underdevelopment. The implication is that regional cohesion and robust bargaining power are weakened within the broader Nigerian politics.

Ukiwo noted that the zone has witnessed a "crisis of leadership" and "criminalization of politics and governance"[4]. In a particular regional summit held in 2011, it was agreed that: "the Southeast has been afflicted by a group of political leaders who are mostly opportunistic, self-serving and lacking in vision for the public good… In most parts of the region, elections have become an organized crime in which political actors deploy violence, bribery and subterfuge to hijack state power for the sole purpose of diverting public treasuries to satisfy personal ends. This creates an environment in which governments are neither accountable nor responsive to the aspirations of the people"[5].

Several instances buttress the points raised above. Politically, the Southeast elites are fragmented in terms of political affiliation and ideology, explaining the inability to reach consensus on economic and security policies. The Governor of Enugu State, Peter Mbah,

[1] Victor Anazonwu, *The Making of an Identity Crisis: How "I am Not Igbo" became a Nigerian Ethnic Label, "*The Renaissance", https://therenaissance.com.ng/the-making-of-an-identity-crisis-how-i-am-not-igbo-became-a-nigerian-ethnic-label-by-victor-anazonwu/ (4.11.2025)

[2] Sahara Reporters, *Northerners Won't Vote Peter Obi for President Because of Biafra Agitations in South-East – Kwankwaso,* 2022, https://saharareporters.com/2022/07/04/northerners-won't-vote-peter-obi-president-because-biafra-agitations-south-east-– (04.07.2022)

[3] Jephthah E. Unaegbu, *Igbophobia in Lagos and Nigeria 2023 Elections: Myth or Reality?* "Amamihe: Journal of Applied Philosophy", Vol. 21, No. 4, 2023, pp.54-71

[4] Ukoha Ukiwo, *Framework For Improving Governance and Security in South East Nigeria*, in Ukoha Ukiwo, Innocent Chukwuma (Eds.), *Governance and Insecurity in South-East Nigeria*, CLEEN Foundation, 2012

[5] South East Summit, *Communique Issued at Strategy Meeting on Democracy and Governance in the South East*, *Owerri, Imo State*, 2011. (7.11.2011). p. 3

belongs to the All-Progressive Congress (APC), Alex Otti of Abia State belongs to the Labour Party (LP), Hope Uzodinma of Imo State belongs to the APC, Charles Soludo of Anambra State belongs to the All-Progressive Grand Alliance (APGA), and Ebonyi State under Francis Nwifuru. Though some of them belong to the same party, it is largely based on individual political survival amid a crisis of legitimacy and possible political ostracism[1]. Additionally, it also explains the lethargic position of the governors to present a common agenda regarding insecurity in the region. The proposed regional security network, nicknamed "Ebube Agu", though perceived in several quarters as a political strategy to checkmate the IPOB, has failed to materialize. While security outfits in other regions, particularly Amotekun in the Southwest, are being commended for their efforts in decimating criminal groups, a lack of political will, funding, and suspicion among locals has impeded the takeoff of Ebube Agu[2]. Therefore, blaming the central government solely for the region's security challenges is an oversimplification.

Furthermore, critics have also contended that the claims of the region's socio-economic backwardness bear the footprint of internal sabotage rather than being centrally induced. Issues such as corruption, poor fiscal management, poor investment in public infrastructure, patronage politics and abandoned projects have undermined development efforts despite the region's entrepreneurial and human capital bases. For instance, the former governor of Anambra State, Willie Obiano, is being investigated for laundering N4 billion from the state government's coffers. Similarly, former Governor of Abia State, Okezie Ikpeazu, is being alleged to have diverted about N10 billion for the Airport Project.[3] Aba and Onitsha markets are regarded as the two most commercial powerhouses in West Africa. Yet, the regional governments could not improve their internally generated revenue base through taxes. In 2025, with Enugu (N406.8 billion), Abia (N66.9billion), Anambra (N54.2 billion), Imo (N36.7 billion), and Ebonyi (N23.2 billion), the entire Southeast states trailed zones like the Southwest and South-South in regional comparisons, with the notable exception of Enugu's recent explosive growth[4].

At the individual level, the Southeast entrepreneurs' preference for investing outside the region has some economic consequences. It improves the revenue base of the host nations and creates employment for their youths, while leaving Southeast economically disadvantaged and less industrialized. Similarly, the enforcement of the Monday sit-at-home order has continued to cripple the regional economy and created an opportunity for de-industrialization. Reports suggest that between 2021 and 2026, the order has cost the region an estimated N17 trillion[5]. Similarly, Nigeria's $93,284,945,10559 billion foreign direct

[1] Ikem C. Olisah, Ogechukwu C. Okafor, *Political Parties and Governance of Southeast States, Nigeria: The Emergence of Four Political Parties in 2023*, "South East Political Science Review", Vol. 8, No.1, 2023, pp. 99-109

[2] Ezinwa V. Chi, Naomi A. Phinos, *Issues and Challenges Facing the Creation of Ebube Agu Security Outfit in the South East Region of Nigeria*, "South-South Journal of Humanities and International Studies", Vol. 4, No. 2, 2021, pp. 171-183

[3] Premium Times, *How ex-Anambra governor allegedly used unlicensed companies to embezzle N4 billion – Witness*, 2025, https://www.premiumtimesng.com/news/top-news/776610-how-ex-anambra-governor-allegedly-used-unlicensed-companies-to-embezzle-n4-billion-witness.html (24.02.2025)

[4] Premium Times, *Enugu IGR rises to N406.8billion in 2025 – Official*, 2026, https://www.premiumtimesng.com/regional/ssouth-east/855327-enugu-igr-rises-to-n406-8billion-in-2025-official.html (9.02.2026)

[5] International Centre for Investigative Reporting (ICIR), Sit-*at-home Crisis Cost S'East over N17trn As Businesses 'Cautiously' Return*, 2026, https://www.icirnigeria.org/counting-the-loss-sit-at-home-crisis-costs-seast-over-n17trillion-as-businesses-cautiously-return/ (17.02.2026)

investments (FDI) between 2013 and the first quarter of 2020, the Southeast region got the least, amounting to a paltry $203,898,690 million and representing just less than one per cent (0.22%) of the total investments.[1] These facts indicate that the central government cannot be totally implicated in the region's socio-economic challenges. Notwithstanding, these internal deficiencies do not in any way invalidate the broader argument of ethnic marginalization. Rather, it demonstrates the complex dynamics of crisis in the Southeast involving both the central and regional forces. The intersection between external and internal dynamics has collectively shaped the environment driving secessionist movements. As a result, any sustainable solution must move beyond issues of socio-political exclusion and restructuring, to issues relating to misgovernance, lack of accountability and sabotage within the Southeast region.

Conclusions. Toward a Sovereign Regional Conference (SRC)

Secession does not occur in a vacuum. It is often rooted in perceived breaches of constitutional rights or sustained grave injustices against a particular group. In the context of Southeast Nigeria, such agitation is a product of historical and systemic marginalization, which has consistently manifested in political exclusion, socio-economic neglect and uneven development outcomes. Within this context, the Nigerian government is perceived as bearing significant responsibility for the grievances, particularly where responses have been selective and exclusionary. Over time, this has evolved from a narrowly defined self-determination struggle to a more complex security challenge, shaped by multiple groups which seek relevance within the agitation space. This raises critical questions about whether this troubling trajectory can be addressed and whether the historical secessionist ambition can be de-escalated. The outcome, however, significantly depends on the degree of commitment, political will and sincerity of the Nigerian government.

Against this backdrop, the paper proposes a sovereign regional conference that will bring together critical stakeholders in a committed roundtable discussion regarding the causes of the agitation. The stakeholders should comprise the representatives of the Nigerian government (both at the federal and state levels), youth groups, leaders of relevant non-state actors (IPOB, Ebube Agu, ESN), traditional rulers, civil society, the media, the regional community (ECOWAS, African Union) and a supra-national body like the United Nations. The international representatives shall serve as both observers and mediators, neutrally ensuring that issues are highlighted and discussed amicably. In addition, to build confidence before the conference, the government shall ensure that prisoners of conscience like Nnamdi Kanu are released unconditionally and allowed to participate in the meeting to encourage trust and meaningful participation. The conference should also be guided by a timeline for the implementation of agreed resolutions, which shall convey a sense of seriousness and commitment. This paper believes that Nigeria requires a process of national healing that is rooted in good governance, inclusion, dialogue and justice. In this regard, Southeast remains a critical component of the national project, and addressing their agitations is critical for long-term stability, unity and development. Acknowledging possible divergent resolutions from the SRC, the paper envisages recommendations that may focus on constitutional restructuring and institutional re-arrangement, economic integration and symbolic reconciliation. Constitutional restructuring and institutional re-arrangement connote reforms

[1] The Guardian, *How South East Lost Out in $93b Foreign Investments*, 2020, https://guardian.ng/news/how-south-east-lost-out-in-93b-foreign-investments/ (12.08.2020)

aimed at achieving genuine federalism, equitable state creation, political representation, rotational power-sharing arrangements and resource allocation. The idea of true federalism rests on equal representation and delineated fiscal mechanisms, which the government enjoys the exclusive authority to constitutionally provide for such arrangements.

The robust constitutional and institutional re-arrangements would provide the needed economic integration for regional development. As the economic hub of the state, the region requires targeted infrastructural investments, industrial support systems, development of transportation networks and seaports. Regardless of the submissions from the diverse groups in the SRC, the interventions should not be perceived as political concessions, but as a constitutional responsibility of the state to all federating units. This will foster a sense of belonging and improve the government's legitimacy in the eyes of the people. In terms of symbolic reconciliation and restorative justice, there is a need for the establishment of initiatives such as public acknowledgement of historical grievances, inter-ethnic truth-telling fora, and civic inclusion programs aimed at procuring national healing and rebuilding people's confidence in the state. The media and civil society groups should play a big role in this aspect by elevating such initiatives beyond mere ideological conception to a practical, daily national discourse in diverse languages for broad participation and reach.

Beyond the SRC, the region's political elites have a big role to play in converting internally-generated assets and revenues, and federally-generated revenues to tangible governance outcomes. While ethnic marginalization can spur political realignments to the center for political survival, political elites should priorities individual and group survival and regional sustainability. The face of any region is the quality of its representatives, in terms of robust representation and negotiation. Politics has a strong link with negotiation, which only the powerful brokers, such as political elites, can engage in. Rather than leave political struggle to the people only, the region's political elites can help negotiate appointments, infrastructural interventions and constitutional reforms that will provide the needed development. Through robust coalition-building, policy advocacy and strategic political engagement by the political elites, the region can be placed at the center of national consideration, which will concomitantly diminish any forms of secessionist ambitions.

Ultimately, addressing secessionist movements does not depend on the deployment of kinetic measures but on constructing a political order for inclusive political participation. When governance is perceived as inclusive, just and equitable, secessionist tendencies lose their appeal, necessitating preference for the nation, consensus building and mutual respect.

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IMPLEMENTING THE BOLOGNA PROCESS THROUGH EUROPEAN MOBILITIES. A SECURITY-ORIENTED PERSPECTIVE

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Abstract

The Bologna Process aims to foster transnational higher education while also developing strong relations between European Universities. This paper focuses on the way that mobilities, regardless of the programme they are affiliated to, help the Bologna Process shape higher education. European Universities are called to start strengthening the internalization of higher education, and I believe that this goal can be achieved with the help of mobilities.

Within the research, we have used a questionnaire and a SWOT analysis, which includes a comparison between the Erasmus+ programme and the FORTHEM Alliance. On one hand, the students of Lucian Blaga University of Sibiu who went abroad through the Erasmus+ programme have voiced their opinions on the Bologna Process in my questionnaire. On the other hand, LUBS has been a member of the FORTHEM Alliance since 2021, programme which also offers the chance to experience studying or researching abroad in a short-term mobility.

Keywords: Bologna Process; Erasmus+ Programme; European Universities Initiative; Romanian higher education; student mobilities

Introduction

According to the document "Education unites us. A vision for the future of education in Romania[3]", education has and has always had multiple roles for the individual and for society. First of all, the education has significant implications for the economic prosperity of each individual, each community, each nation. At the same time, it remains the main benchmark through which values and traditions are transmitted from generation to generation. Also, education is what ensures stability and social development. A country that invests in education and human capital development undertakes one of the most beneficial strategies for the long-term advancement of society. For this reason, educational and scientific research institutions are considered strategic institutions for the national destiny, and the European education standards can guide these institutions towards achieving educational objectives.

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[3] Ministerul Educației și Cercetării, *Educația ne unește. Viziune asupra viitorului educației în România*, https://share.google/raTFcvzq0Zkd0OXSq (05.12.2025)

Contemporary societies are undergoing accelerated technological, social, and economic transformations, requiring education systems to continuously adapt to emerging realities. The challenges brought by this complexity can be countered by revising the traditional notion of "education", and creating a new way of educating people. The interdependence between the development of society and the progress in education determines the permanent reconfiguration of educational dimensions. A greener, more inclusive and more digital society is becoming a reality more and more rapidly[1].

This reconfiguration is reflected in the need to create a more complex and united Europe, by establishing and consolidating its intellectual, cultural, social, scientific and technological dimensions. Therefore, the idea that Europe should become a space capable of providing its citizens with the necessary skills to face the challenges of the new millennium, as well as belonging to a common social and cultural space, is becoming more prevalent in our society. The prospects of enlargement, together with the deepening of relations with other European countries, provide even broader dimensions to this reality.

Security as a Dimension of the EU Educational Policies

The Bologna Process seeks to harmonize European the higher education systems. This objective can be linked to security through the strengthening of social stability; the reduction educational inequalities; the prevention of radicalization through education; the development of a shared European identity. In this regard, education functions as an instrument of societal and democratic security[2]. The Bologna Process promotes: equal access to education, academic mobility, social inclusion, also the development of competencies. All these aspects represent an integrated part within the human security concept and contribute to social economy, economic security, civic resilience, the reduction of social vulnerabilities. It is considered that the vision underpinning the Bologna Process is embedded within the dominant paradigm of the knowledge-based economy and knowledge society. This framing helps explain why the Bologna Process is both intelligible and perceived as legitimate by the actors involved, thereby rendering its expanding set of commitments more readily acceptable[3].

International education can be conceptualized as a form of "soft security" or "soft power"[4], in the sense of exerting indirect, non-coercive influence at the global level. Programs such as Erasmus, university exchange schemes, and the recognition of academic qualifications foster inter-state cooperation, contribute to academic diplomacy, and facilitate the reduction of cultural tensions. Following the digitalization of universities, issues such as the protection of academic data, the security of online platforms, the prevention and combatting of academic fraud, and the safeguarding of university IT infrastructure have become increasingly important topics within the Bologna Process framework. Possible linkages include cybersecurity, digital education, and the protection of personal data. Another approach deserved to be taken into account as an interrelation between security and EU

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[4] Laura C. Ferreira-Pereira, Joao Mourato Pinto, *Soft Power in the European Union`s Strategic Partnership Diplomacy. The Erasmus Plus Programme*, "The European Union in International Affairs", 2021, pp. 69-94, DOI: 10.1007/978-3-030-66061-1_4

educational policies refers to combating disinformation and democratic resilience. Universities reformed under the Bologna Process contribute to the development of critical thinking, media literacy, and the countering of extremism and propaganda. In this context, an interconnection emerges between information security, civic education, and European democracy.

Within the framework of the Bologna Process, the harmonization of professional competencies across Europe could contribute to improve the labour market integration, leading to reduced unemployment, greater workforce adaptability, enhanced economic stability, and strengthened European competitiveness. These developments can be understood as integral components of economic security. The Bologna Process aims to harmonize professional competencies across Europe, facilitating comparability and compatibility of qualifications within the European Higher Education Area. Relevant outcomes in terms of security include reduced unemployment, enhanced adaptability of the workforce, improved economic stability, and increased European competitiveness. These elements are closely linked to the broader concept of economic security[1]. Education, particularly through European university cooperation, constitutes a relevant instrument for conflict prevention and peace consolidation. Within the European Higher Education Area, academic collaboration fosters intercultural dialogue, contributes to the mitigation of extreme forms of nationalism, and supports processes of regional integration. In this regard, the Bologna Process can be understood as a peace-building mechanism, a tool of regional security, and an essential component of European stability[2].

Educational security constitutes a fundamental factor in ensuring and enhancing the quality of the educational process, contributing to the reduction of academic inequalities and the expansion of equitable access to educational resources and knowledge. From a social perspective, it supports the promotion of tolerance, inclusion, and social cohesion, while simultaneously mitigating discrimination and manifestations of extremism at societal level, including within the European context. From an economic standpoint, educational security facilitates the formation of a highly skilled and competitive workforce, increases graduates' employability, and strengthens the transition towards a knowledge and innovation-based economy. Moreover, at the European and international levels, it contributes to the reinforcement of cooperative relations between states, the promotion and consolidation of democratic values, as well as the prevention of conflicts through educational and cultural cooperation.

Over time, internationalisation in higher education has evolved from a largely reactive practice into a proactive strategic priority, shifting from being regarded as an added value to becoming an integral component of institutional policy and practice. In parallel, its scope, focus, and overall conceptualisation have undergone significant transformation. The growing competitiveness of the higher education sector, alongside increasing commercialisation and the expansion of cross-border provision, has placed traditional forms of academic cooperation, such as exchanges and institutional partnerships, under new pressure. At the same time, greater emphasis has been placed on embedding international perspectives within domestic learning environments[3]. As a result, the internationalisation of curricula and of

[1] Richard Leoni, *Graduate employability and the development of competencies. The incomplete reform of the Bologna Process",* "Internatioanl Journal of Manpower, Vol. 35, No. 4, 2014, pp. 448-469, https://doi.org/10.1108/IJM-05-2013-0097

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[3] De Wit, Hans, *Globalisation and Internalization of Higher Education*, Universita Oberta de Catalunya, 2011, https://doi.org/10.7238/rusc.v8i2.1247

teaching and learning processes, often described as internationalisation at home has gained importance comparable to that of student mobility, whether for full-degree programmes or short-term study experiences integrated into home institutions.

Conceptual and Legal Framework

The Sorbonne Declaration of 25 May 1998[1] emphasised the central role of universities in developing the European cultural dimension. The Declaration supported the creation of the European Higher Education Area, with the aim of increasing the employability of citizens and promoting and facilitating their mobility.

The Bologna Declaration[2] of 19 June 1999 (which we will approach in more detail in the next chapter) speaks of the importance of increasing the international competitiveness of European higher education.

There are almost 5,000 higher education institutions in Europe, with 17.5 million tertiary students, 1.35 million tertiary teachers and 1.17 million researchers[3]. Following the two Declarations, the European Education Area (EEA), the European Research Area (ERA) and the European Higher Education Area (EHEA) were created, in order to ensure three main thigs: better collaboration between all academic entities and academic staff, development of academic research and provision of jobs for highly qualified Europeans.

To ensure its evolution in a changing society, Europe needs more people with high-level skills. EU Member States have set a target for at least 45% of people aged 25 to 34 to obtain a higher education qualification by 2030[4]. In 2023, the percentage was 43%[5], and in 2024 around 44%[6] In Romania, the situation is different. According to the *Eurostudent National Report*[7], 85% of Romanian students want to finish the university they started, exceeding the European average of 78%. However, between 2023 and 2024, the number of young people with higher education was much lower, at around 25%[8].

Thus, the European dimension is becoming more and more integrated into the educational policies of European states, a dimension that aims to train European citizens with a European conscience and identity[9]. At the same time, education can promote both respect for human rights and the culture of other people, as well as the cultivation of dialogue between nations. At the World Conference of Partners for Higher Education, from June 2003, the current importance of this contribution was underlined: “At no time in human history has

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[1] *Sorbone Joint Declaration*, *Joint Declarations of Harmonisation of the Architecture of the European Higher Education System,* Paris, the Sorbone, May 25 1998, https://ehea.info/media.ehea.info/file/1998_Sorbonne/61/2/1998_Sorbonne_Declaration_English_552612.pdf (15.04.2026)

[2] *The Bologna Declaration of June 1999, Joint Declaration of the European Ministers of Education*, https://ehea.info/Upload/document/ministerial_declarations/1999_Bologna_Declaration_English_553028.pdf (15.04.2026)

[3] European Union, *European Education Area*, https://education.ec.europa.eu/education-levels/higher-education/about-higher-education (20.12.2025)

[4] European Commission, *Education and Training Monitor*, https://op.europa.eu/webpub/eac/education-and-training-monitor/en/monitor-toolbox/country-page/romania.html (13.04.2026)

[5] Eurostat, *43% of EU's 25-34-year-olds have tertiary education*, https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20240527-1? (13.04.2026)

[6] *Idem*

[7] Raportul Național EUROSTUDENT VIII 2021-2024, *Condițiile de viață și studiu ale studenților*, Editura Institutul de Științe ale Educației, București, 2026

[8] European Commission, https://op.europa.eu/webpub/eac/education-and-training-monitor/en/monitor-toolbox/country-page/romania.html (15.04.2026)

[9] Duțu, Alexandru, *Ideea de Europa și evoluția conștiinței*, Editura All, București, 1999, p.100

the well-being of nations been so closely linked to the quality and scope of education systems and higher education institutions"[1].

The purpose of universities is to provide young people with an education that can help them maintain a balance in their personal lives and the ability to adapt to the dynamics of a constantly changing society. Such training can and should be supported by student mobility in different European universities[2].

A mobility process refers to the possibility for students and university staff to study, respectively work, for a limited period of time, outside the higher education institution of which they are a part, in order to broaden their perspectives regarding their field of study and their position in society. Mobilities can be of two types: internal (held in the country of origin, but at a different university) and external (held abroad)[3]. In order to have an effective implementation of the strategy, coherence of policy priorities and investments at all levels (EU, national, regional and institutional), as well as closer collaboration with and between Member States, higher education institutions and other stakeholders are required. This strategy is supported by several initiatives, the most relevant for this article being "the further expansion of the European Universities Initiative"[4].

This initiative aims to strengthen strategic partnerships between European universities and to increase the international competitiveness of European higher education. This initiative is mainly financed by the EU, through the Erasmus+ programme. Several universities from Romania (such as The University of Bucharest, Technical University of Civil Engineering Bucharest, National School of Political and Administrative Studies, Babeș-Bolyai University, "Lucian Blaga" University of Sibiu, The University of Oradea and "Gheorghe Asachi" Technical University of Iași[5]) are part of this initiative because they are members of different European Alliances.

The initiative aims to create 60 European alliances, which will have to include over 500 universities. The initiative is supported by the Erasmus+ programme, which has a budget of 1.1 billion euros between 2021-2027[6]. The aim is to develop and share a common long-term structural, sustainable and systemic cooperation in the field of education, research and innovation, creating European inter-university campuses where students, staff and researchers from all parts of Europe benefit from mobilities and research together, in different countries and disciplines.

Therefore, a deeper and more sustainable transnational cooperation between higher education institutions is sought, in order to ensure a more efficient implementation of joint educational programs and activities. EU Member States are called upon to establish more

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[1] Responsabilitatea Socială a Universităților - Un Cadru Comun de Referință European. *Raport Final al Proiectului EU-USR*, https://www.researchgate.net/publication/312098629_Responsabilitatea_Sociala_a_Universitatilor_-_Un_Cadru_Comun_de_Referinta_European_Raport_Final_al_Proiectului_EU-USR_52709-LLP-2012-1-RO-ERASMUS-ESIN, 2015 (27.04.2026)

[2] Mircea Cosma, *Spațiul european al învățământului superior*, "Anuarul Academiei Forțelor Terestre", No. 2, 2002-2003, p. 1

[3] ANOSR, *Implementarea Procesului Bologna în România: perspectiva studenților*, 2012, p. 45, https://share.google/ixIKIjXRSV9lMrFuM (20.12.2025)

[4] European Commission, *Higher Education Initiatives,* https://education.ec.europa.eu/education-levels/higher-education/about-higher-education (20.12.2025)

[5] Comisia Europeană, *7 universități din România selectate în cadrul inițiativei privind Universitățile Europene,* https://romania.representation.ec.europa.eu/news/7-universitati-din-romania-selectate-cadrul-initiativei-privind-universitatile-europene-2022-07-27_ro (05.02.2026)

[6] *Idem*

coherent and compatible policies to enable such transnational cooperation, but also to make investments at EU, national, regional and institutional levels in terms of the European Higher Education Area, developed through the Bologna Process, which Romania has joined in 1999.

Undoubtedly, mobility constitutes one of the most prominent lines of action within the Bologna Process. The creation of the European Higher Education Area (EHEA) and the internationalisation of higher education are objectives that can be achieved through the existence of mobility, thanks to the exchange of visions and good practices and the development of educational reforms, which mobility promotes. It is ideal that the EHEA should contribute, through the collaboration of the ministers responsible for higher education in the Member States, to the consolidation of a European society based on knowledge and innovation, a society in which students and teaching staff have the freedom to choose and participate in the educational process of any other university, without barriers, at least once[1].

"The Education and Training 2020" strategy reflected the importance given to mobility at European level: 20% of students in each country must benefit of a mobility. The target had had to be reached by 2020, whilst Romania, along with the EHEA member countries, agreed to try and reach this percentage. Unfortunately, most states recorded values below 20%. In Romania, the situation of student mobility in the academic year 2010-2011 showed that only 0.43% of students out of almost one million benefited from mobility outside the country[2]. In 2022, a significant increase in the percentage can be observed: 9% out of approximately 450,000 students participated in mobilities[3].

The directions that the European Commission will continue to support, with the aim of increasing the adaptation of EU higher education to changes in society, are also relevant[4]:

• improving quality assurance;

• including diversity and inclusion in a European framework;

• developing new STEAM (science, technology, engineering, arts, mathematics) and information and communication technology (ICT) curricula;

• promoting research and innovation through the European Institute of Innovation and Technology (EIT);

• tracking the career paths of graduates, so that higher education outcomes can be compared.

It is recommended that Romania follows the initiatives proposed by the Union, in order to increase the effectiveness of its higher education system, while also collaborating better with other universities from Europe. Romanian universities continue to promote mobility, through the Erasmus+ program, but also through the Alliances of which they are part, so that more and more students can benefit from this experience.

Romanian Educational System within the European Standards

In an increasingly interconnected and diversified world, the education system cannot be left behind. Nowadays, we can say that Romanian education is in the midst of a process of reform and transformation, a process due to the developments that have taken place and are taking place in Romanian society and which are also imposed by the need to align with

[1] ANOSR, *Implementarea Procesului Bologna în România: perspectiva studenților*, 2012, p. 45, https://share.google/ixIKIjXRSV9lMrFuM (20.12.2025)

[2] *Idem*

[3] Friedrich Ebert Stiftung, *Creștere a numărului de studenți cu burse Erasmus în Europa. România trimite mai mulți studenți în străinătate decât primește*, https://romania.fes.de/ro/e/crestere-a-numarului-de-studenti-cu-burse-erasmus-in-europa-romania-trimite-mai-multi-studenti-in-strainatate-decat-primeste.html (13.04.2026)

[4] https://education.ec.europa.eu/education-levels/higher-education/about-higher-education (20.12.2025)

European Union standards. Through the educational system, the personality of the most important resource, the human being, is shaped. For this reason, the education system must be built in such a way as to provide knowledge and skills comparable to other educational units of the European Union or the world.

Romania's process of European integration has exerted a direct influence on national educational policies and the higher education system. Educational reform is the expression of the openness which the education system must demonstrate, in order to offer people and communities the opportunity to define themselves as human beings. Romania's accession to the European Union opened the way to the modernization of the education system. The communist model (demagogic, rigid and focused on an industrial society) had to be removed and replaced with what was suitable at the European level (a flexible, dynamic model that can adapt to continuous changes in society). Therefore, the Romanian school system is in a continuous effort to change and adapt to European requirements, the modernization and renewal of the Romanian education system being necessary in order to ensure the quality of the teaching-learning process. Among specialists, there seems to be a consensus of opinions on the idea that the reform of any education system is, if not exclusively, at least mainly, a curricular reform[1].

The European Union collaborates with higher education institutions and EU member states to support and enable the university sector to adapt to the changing conditions in the world, to thrive and to contribute to Europe's resilience. The cooperation between these entities aims to truly develop the European dimension of higher education based on shared values, with educational excellence and social inclusion as distinctive features. At the same time, it is important to mention that the EU has developed a European strategy for universities, which focuses on achieving four main objectives[2]: providing constant support for universities; strengthening the European dimension in higher education and research; empowering universities as actors of change in the green and digital transitions and strengthening universities as the driver of Europe's role and position as global leader. Beginning in 2005, Romania restructured its higher education system in accordance with the three-cycle model, encompassing undergraduate (Bachelor's/Licence), graduate (Master's), and doctoral (PhD) studies, as established under Law no. 288/2004[3]. In parallel, the implementation of the European Credit Transfer and Accumulation System (ECTS), together with the compulsory issuance of the Diploma Supplement, became standard practice across all universities.

A significant milestone in the modernization of Romanian higher education, particularly in its efforts to integrate more effectively into the European Higher Education Area, was the enactment of Law no. 87/2006[4] concerning quality assurance in education. This legislative framework adopts a comprehensive, system-wide approach, applying to all providers of educational services in Romania. The law establishes a structured framework for quality assurance by outlining key components such as[5]: the methodological foundations for

[1] Alexandru Crișan, *Curriculum reform in Romania*. Institute for Educational Sciences, București, 1992, p. 2
[2] European Comission, *Higher education initiatives*, https://education.ec.europa.eu/education-levels/higher-education/about-higher-education (20.12.2025)
[3] *Law No. 288/2004 on the organization of university studies*, "Official Gazette, Part I", No. 614 of 7 July 2004
[4] *Law No. 87/2006, approving Government Emergency Ordinance No. 75/2005 on quality assurance in education*, "Official Gazette, Part I", No. 334 of 13 April 2006
[5] Adrian Curaj, Ligia Deca, Eva Egron Polak, Jamil Salmi (Eds.), *Higher Education Reforms in Romania. Between the Bologna Process and National Challenges*, Springer, 2015, pp. 7-8, DOI 10.1007/978-3-319-08054-3

accreditation and quality evaluation in higher education; the procedures and criteria governing external evaluation at both institutional and programme levels; mechanisms for internal quality assurance within higher education institutions; and the institutional structures responsible for overseeing and implementing quality assurance processes.

Romania's accession as a full member of the Bologna Process in 1999 marked an important step toward the standardization of European higher education[1] and the diversification of educational opportunities beyond secondary schooling.

Erasmus + and FORTHEM Alliance

To gain a better understanding of the differences between the Erasmus program and the FORTHEM Alliance, a description before discussing the questionnaire and the SWOT analysis would be welcomed. In this regard, Erasmus+ is the European Union program for education, training, youth and sport. The program is named after the Dutch philosopher Desiderius Erasmus of Rotterdam, one of the European intellectuals of the Renaissance. At the same time, "ERASMUS" is an acronym for "European Community Action Scheme for the Mobility of University Students". The program is a key instrument that supports the achievement of the objectives set at European level through the European Education Area, the Digital Education Action Plan, 2021-2027, the EU Youth Strategy, the Skills Agenda for Europe and the European Union Work Plan for Sport[2]. Erasmus+ aims to provide mobility and cooperation opportunities between all actors actively involved in the aforementioned fields, either as individuals or as institutions/organizations.

The 4 priorities of Erasmus+ are: inclusion and diversity, climate change, digital transition and democratic participation.

European Universities are transnational alliances of 8-9 partner countries, located in EU Member States, Erasmus+ countries (including the Western Balkans, starting in 2023) and Bologna Process countries (Ukraine and the United Kingdom of Great Britain and Northern Ireland have been allowed to take part in the project as associated partners, starting in 2022)[3]. The alliances are based on innovative teaching and research methods, multilingualism and an interdisciplinary approach to create a common long-term strategy of European universities, preparing future generations.

The FORTHEM Alliance (Fostering Outreach within European Regions, Transnational Higher Education, and Mobility) project was initiated in 2019 as part of the European Universities Initiative. In 2019, the European Commission launched this initiative within the framework of the ERASMUS+ programme, with the aim of supporting the expansion and intensification of cooperation between European universities, both by increasing the number of academic mobilities and by promoting better institutional synergy at all levels (including study and research programmes to administrative strategies and regional engagement).

This alliance is an academic consortium that aims at cooperation between different European regions, transnational higher education and the promotion of European mobilities. The alliance includes 232,000 students, 254 research institutes, 19,000 academics, 17,000

[1] Radu Mircea Damian, *The Bologna Process as a Reform Initiative in Higher Education in the Balkan Countries: The Case of Romania*, "European Education", Vol. 43, 2011, pp. 56–69, https://doi.org/10.2753/EUE1056-4934430304

[2] ANPCDEFP, *Erasmus+. Experienţe de neuitat şi noi orizonturi*, https://www.erasmusplus.ro/erasmus-1 (15.01.2026)

[3] Campus France, *European Universities Alliances*, https://www.campusfrance.org/en/european-universities-alliances (15.02.2026)

administrative staff and 200 doctoral programmes. In addition to transnational cooperation, the alliance has set itself, since its inception, strategic objectives of regional development and the promotion of intercultural exchanges. In order to create true regional innovation networks, FORTHEM collaborates not only with higher education institutions, but also with local administration, business entities and societal actors.

The FORTHEM University Alliance aims to unite a new generation of creative minds, able to cooperate across cultures, borders and disciplines, in order to jointly address societal challenges and the skills shortages facing Europe. FORTHEM is a network of multidisciplinary public universities from the following countries:

- Finland (Jyväskylä Yliopisto);
- France (Université Bourgogne Europe);
- Germany (Johannes Gutenberg-Universität Mainz);
- Italy (Universita degli Studi di Palermo);
- Latvia (Latvijas Universitāte);
- Norway (Universitetet i Agder);
- Poland (Uniwersytet Opolski);
- Romania (Lucian Blaga University of Sibiu);
- Spain (Universitat de València).

Therefore, thanks to the Erasmus+ programme, the European Commission, together with national authorities, higher education institutions, students and other stakeholders, have set in motion a more intensive and structured cooperation among European higher education institutions. University Alliances also represent the future higher education, promoting closer cooperation between the member universities.

Study Case. Lucian Blaga University of Sibiu

The purpose of universities is to provide young people with an education that can help maintain balance in their personal lives, as well as the ability to adapt to the dynamics of a constantly changing society. Such training can and must be supported by student mobility in different European universities[1]. Lucian Blaga University of Sibiu (LBUS) understands the importance of cooperation through mobility. LBUS offers students mobility within the Erasmus+ program, as well as short-term individual or collective mobility through the FORTHEM University Alliance. The Report which follows internalisation in ULBS from 2024[2] demonstrates that mobility remains a priority for LBUS. In the year 2024, 171 students have participated in mobilities abroad.

In the context of an increasingly dynamic international university environment, the Lucian Blaga University of Sibiu remains at the forefront of events by adhering to the European values of education and research. In this regard, an essential role is played by the over 100 partnerships concluded with universities in Europe[3], the streamlining of the application of the Bologna system and the European credit transfer system, and the development of the student mobility programmes.

[1] Mircea Cosma, *Spațiul european al învățământului superior*, "Anuarul Academiei Forțelor Terestre", No.2, 2002-2003, p. 1

[2] Lucian Blaga University of Sibiu, *Raport privind Activitatea de Cercetare, Inovare și Internaționalizare desfășurată la Universitatea „Lucian Blaga" din Sibiu*, 2024, p. 29-24 https://senat.ulbsibiu.ro/wp-content/uploads/300125/4_Raport%20prorector%20cercetare%20privind%20actv%20desf%20in%20anul%202024_Senat_ian2025.pdf (13.04.2026)

[3] *Idem*

The official website of ULBS[1] mentions the responsibility that the institution has taken on to align itself with the Bologna Process. I decided to apply a questionnaire to several students from Sibiu to observe how they perceive the connection between the Bologna Process and the Erasmus+ programme. I have also conducted a SWOT analysis, because I wanted to analyse which program would withstand the constant changes worldwide while promoting the internalisation of higher education.

The questionnaire has helped us get in contact with the students of LBUS. Since mobilities play an important part in the Bologna Process, the questionnaire was meant to show us if the students who studied abroad through Erasmus know anything about the Bologna Process. The questionnaire was applied to a sample of 20 people, aged between 20-26. There are three answers that are invalid. Three students who did not participate in any Erasmus mobilities answered the questionnaire, even though it was mentioned that only people who participated in Erasmus mobilities should take part in the survey. The exclusion of their answers did not influence the distribution of results.

At the moment, 17 out of 20 are studying at the Lucian Blaga University of Sibiu, while 3 are graduates of this university (Figure 1). The students are enrolled in 6 different faculties (Law, Economics, Engineering, Letters and Arts, Sciences, Social Sciences and Humanities).

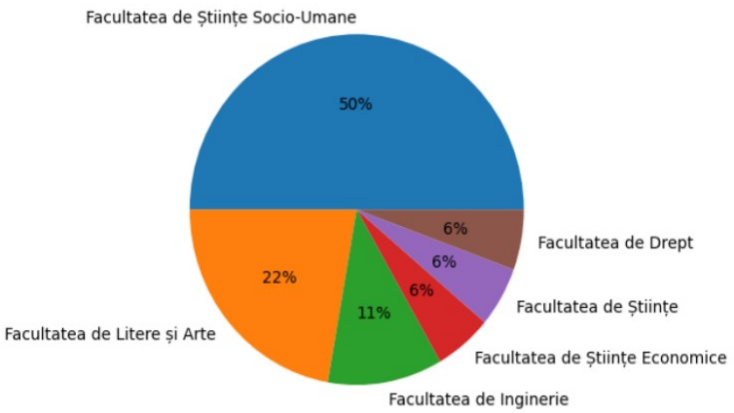

Figure 1. Faculties within the Lucian Blaga University of Sibiu[2]

The countries in which the respondents studied are the following (Figure 2): Finland (1 student), France (1 student), Germany (6 students), Greece (1 student), Italy (3 students), Norway (1 student), Portugal (2 students), Poland (1 student), Spain (4), Turkey (3). Some of these respondents participated in Erasmus+ mobility twice, but in different countries. 12 people spent a semester in one of the countries listed above, and the rest spent a year each. As can be seen, Germany remains the most desired destination when it comes to studying abroad.

[1] Lucian Blaga University of Sibiu, *Realizări*, https://www.ulbsibiu.ro/ro/despre/despre-ulbs/realizari/ (13.04.2026)
[2] Authors` research

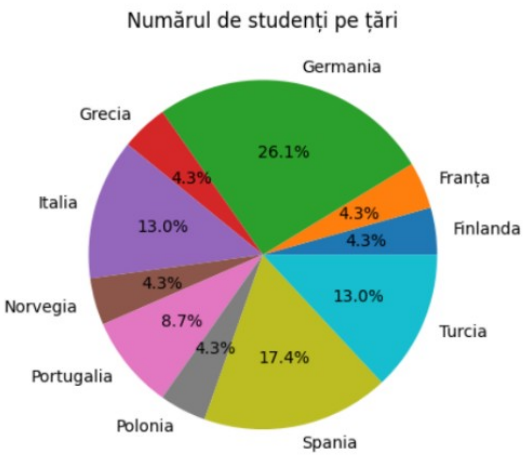

Figure 2. Number of students/countries[1]

The questionnaire consists of two sections: the first section has questions related to the students' experience abroad, correlated to the Bologna Process, and the second contains socio-demographic questions. The questions they had to answer were the following:

- Do you know what the Bologna System entails?
- If you know what the Bologna System entails, can you list/describe its main advantages?
- Would you Did you benefit from information regarding the Bologna System during your Erasmus+ mobility period?
- Do you think that the Bologna System is applied in the country where you studied within the Erasmus+ program?
- Do you think that the Bologna System is applied in Romania?

In terms of their answers, the majority voted that they knew what the Bologna System entails. Since they stated that they knew what this system entails, they also brought their personal touch to the second question, with the majority listing the transferable credits (ECTS) as its main advantage. Other advantages listed included: access to study mobilities such as ERASMUS+, and international recognition of studies. Only one person stated that the Bologna System has "many negative points", but did not elaborate on this statement.

Most respondents claim that they benefited from information about the Bologna System during their mobility period. They also claim that the Bologna System is applied in the country where they studied, and most believe that the Bologna System is also applied in Romania.

Studies attest that the most favourable results of the impact of the program are recorded in students coming from countries in Southeastern Europe and from partner countries[2], as well as from countries where the gross domestic product is low, regardless of the economic situation in the host country. Relating these studies to the questionnaire I applied, it can be seen that Romanian students felt a positive impact of the experience offered

[1] *Idem*

[2] European Commission, *Erasmus+ Higher Education Impact Study. Final Report, European Union, Luxembourg*, 2019, p. 103, https://op.europa.eu/en/publication-detail/-/publication/94d97f5c-7ae2-11e9-9f05-01aa75ed71a1

by the Erasmus+ program, believing that the Bologna System helps to strengthen relations between European universities (Figure 3-7).

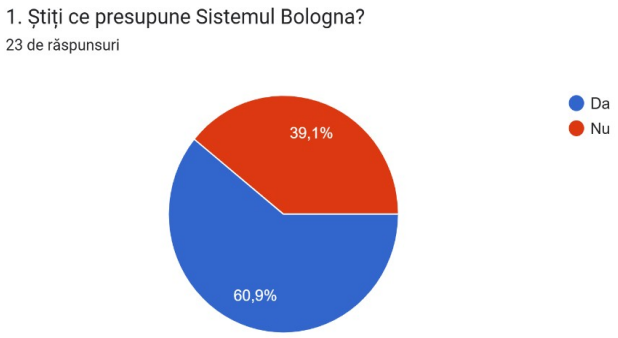

Figure 3. Q1 – Do you know what Bologna System entails?[1]

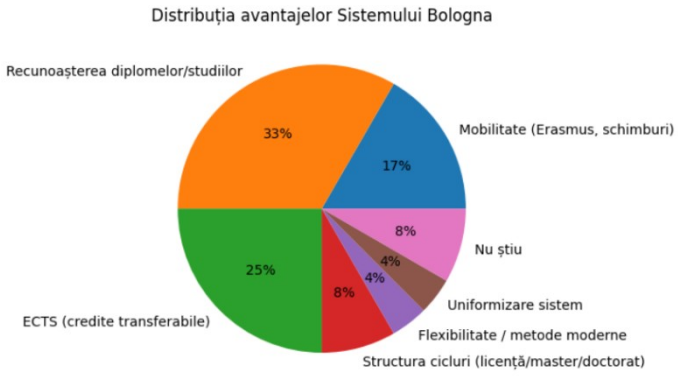

Figure 4. The allocation of benefits within the Bologna Process[2]

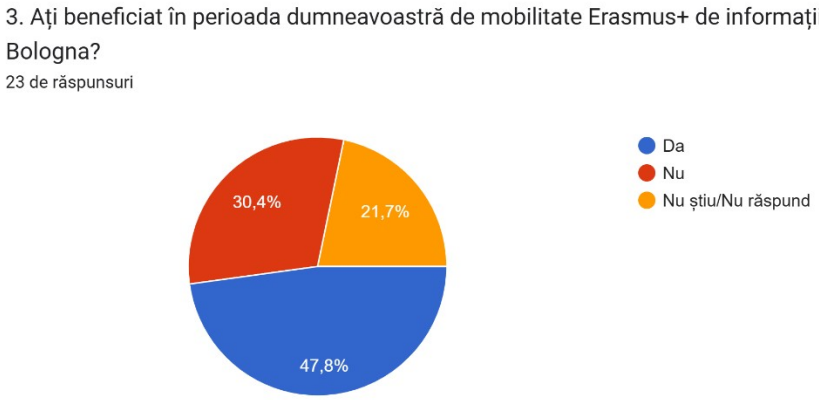

Figure 5. Q2 -During your Erasmus+ mobility, did you receive information about the Bologna Process? [3]

[1] Author's processing based on questionnaire data
[2] *Idem*

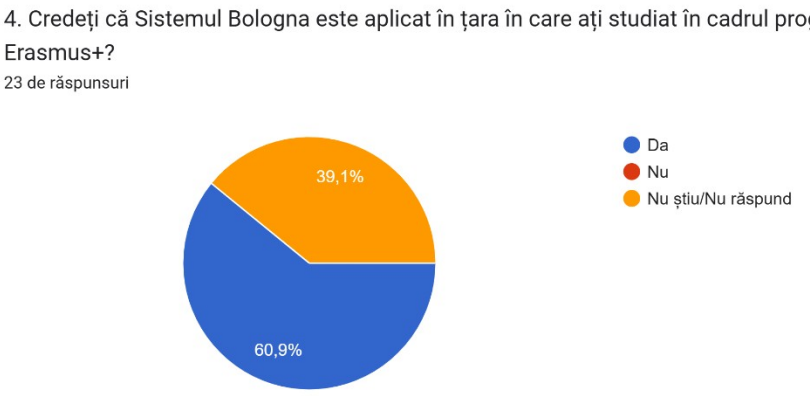

Figure 6. Q3 - Do you consider that the Bologna Process is effectively applied in the country where you studied within the Erasmus programme? [1]

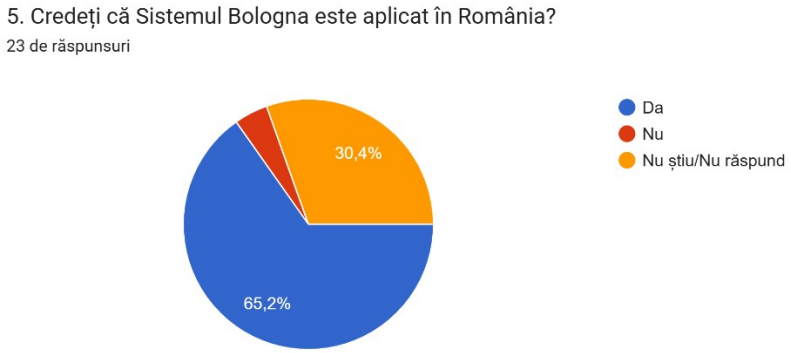

Figure 7. Q4 - Do you consider that Romania applies the Bologna Process in practice? [2]

The SWOT analysis we have conducted follows Erasmus+ and FORTHEM individually, then follows a general conclusion.

Erasmus+ Programme

A. Strengths:

1. The program's notoriety and prestige.

Having its origins in the 1980s, the Erasmus program is accessed by millions of Europeans every year, from high school students to university students and academics.

2. The longer periods of abroad studying.

In addition to short-term mobilities, Erasmus+ offers study grants for longer periods, such as a semester (6 months) or even a year (12 months).

3. The diversified network of partner universities.

[3] Author's processing based on questionnaire data

[1] *Idem*

[2] *Idem*

Erasmus+ provides mobilities within Europe, but also mobilities outside the European continent, depending on the agreements concluded between the respective university and countries such as Japan, South Korea, Canada, etc.

B. Weaknesses:

1. Excessive bureaucracy.

The selection process, as well as the preparation of travel documents (once the person has been accepted), can be difficult and lengthy.

2. Limited offer of courses.

For some fields of study, the list of partner universities can be quite limited, which also restricts the diversity of the courses the students can choose.

C. Opportunities

1. Academic and professional development.

Erasmus+ also provides internship programs, which help students gain practical experience in the field which they are studying.

2. Networking.

Erasmus+ mobility and internship beneficiaries come into contact with other students, teachers, employers and other opportunities which help them develop personally and professionally

D. Threats

1. Grants are not enough.

Due to the increased costs in certain countries, especially in Western Europe, the grants offered by the EU are not enough, and students have to support themselves financially. For this reason, some students give up the idea of benefiting of Erasmus+ mobilities.

2. Differences between education systems.

Although students receive a list of institutions that have specializations compatible with their field of study, they may have problems with the exams at their home university, once they return to their country of origin.

3. Inequity instead of accessibility.

Due to the enormous costs involved in carrying out the program's actions, the Erasmus experience cannot represent a generalized phenomenon within student experiences, being more a mark of elitism sponsored by the European Commission and less of egalitarianism. The possibility of participating in an Erasmus experience is directly dependent on the country of origin, the financial contributions of national governments, subsidies and even the financial support offered by the family to the student willing to participate in such an experience.

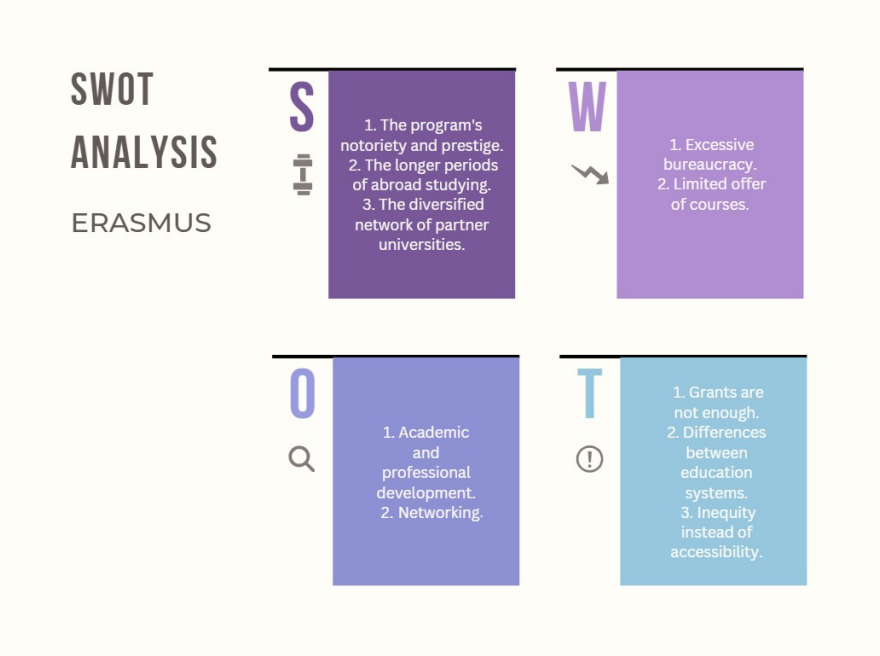

Figure 8. Erasmus Swot Analysis[1]

FORTHEM Alliance

A. Strengths

1. Small network of universities.

The fact that the Alliance has only 9 member universities contributes to closer collaboration between them and facilitates the rapid exchange of information.

2. Integration of Alliance programs can be faster.

Member Universities can come up with different hybrid/on campus courses and activities easier.

B. Weaknesses

1. Only 2 mobilities per study cycle.

The student is entitled to only two mobilities per study cycle, unlike Erasmus, where the student can combine long and short mobilities, for a maximum of 12 months.

2. Possible poor organization.

Some events which should be held by all universities, such as Democracy Week, are held only in a few of the member universities.

C. Opportunities

1. Development of personal projects.

People interested in research have the opportunity to spend up to 5 days at one of the partner universities and research with mentors from abroad.

2. Closer interactions, not just academic ones.

FORTHEM mobilities are dedicated to smaller groups of students and focus on activities such as labs, interdisciplinary projects and workshops.

D. Threats

1. EU funding.

The alliances are relatively new and dependent on EU funding.

[1] Author's processing based on questionnaire data

2. It is not very well known among students.

Because it is not promoted enough among students, the opportunities offered by FORTHEM are not accessed to the maximum.

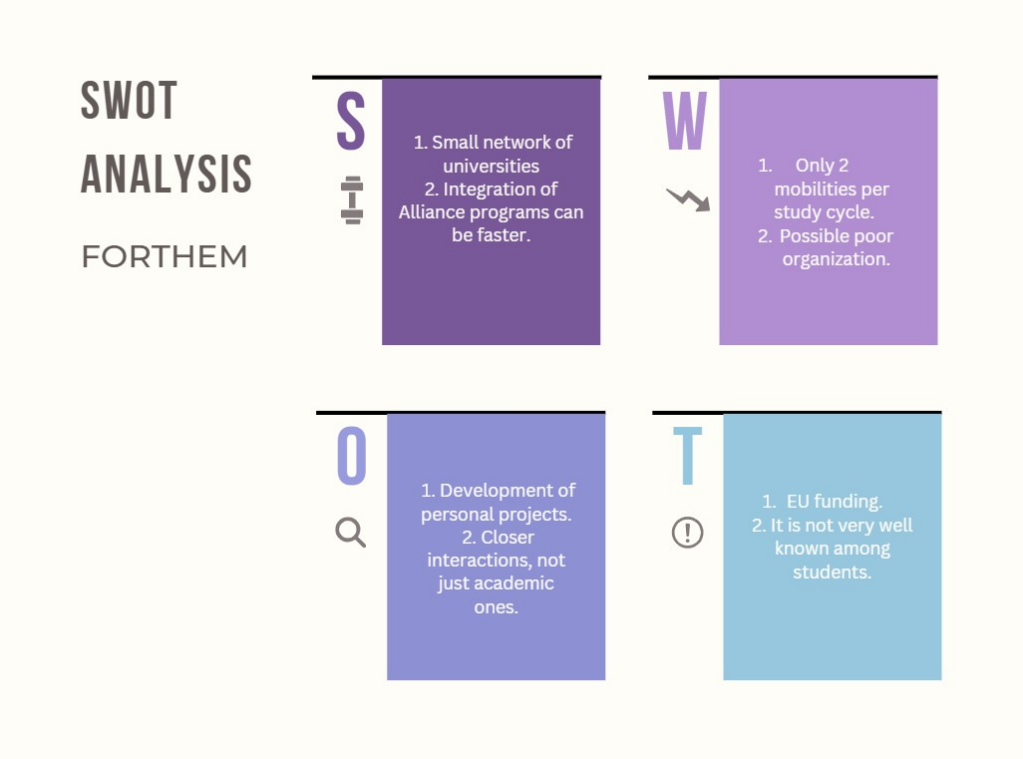

Figure 9. FORTHEM Swot Analysis

Conclusions

This analysis concludes that Erasmus+ functions as a widely accessible programme, whereas FORTHEM operates as an innovative and experimental model within European higher education. The mobilities offered by Erasmus+ remain an important landmark of the student experience, but we should not ignore the emerging opportunities regarding exchange of information and academics. Although it offers a limited number of destinations, the FORTHEM Alliance focuses on quality, not quantity, offering a wide range of events for students, university teachers and researchers. The FORTHEM Alliance (if we were to extrapolate, FORTHEM alongside other university alliances) represents the future in terms of the internationalization of the higher education system.

The real involvement of universities in diversifying students' learning experiences and supporting them in accessing various external mobility programs from a financial point of view and beyond remains an important objective to be achieved by universities. Emphasis should also be placed on internal mobilities, in order to facilitate their access by those who wish to do so.

Thus, we would state that Erasmus+ needs a reorganization to adapt to the new realities of the world we live in, and the FORTHEM Alliance needs to be promoted more among students. In order for these objectives to be achieved, I believe that it is important to have cooperation between partner entities; to draw up strategic plans related to the needs of people accessing such opportunities and to start pilot programs. The lack of resources, the lack of evaluation systems, excessive formalism and bureaucracy, as well as the deficient

institutional support for students hinder the fulfilment and efficiency of these mobility programs.

In conclusion, Erasmus+ has played a crucial role in the systematic transformation and restructuring of higher education systems across Europe. The states that have benefitted the most from this programme remain the former communist bloc states. As it can be seen from the strategy of LBUS, Erasmus+ represents a main goal when it comes to internationalisation. At the same time, Romanian students that are enrolled at LBUS take part in mobilities, while most of them are also aware of the way that the Bologna Process works. The exchange of students between universities enhances the process of internationalization, while helping these institutions align more with the Bologna Process. The Erasmus program is a fundamental instrument in the direction of the internationalization of higher education systems in Europe, but universities must focus on different alternatives for academic mobilities. Erasmus, alongside European Alliances, can help the member states of the Bologna Process cooperate more effectively in the future.

The Bologna Process, together with Erasmus+ mobilities and the broader internationalisation of higher education in the European Union, can be understood as a multidimensional framework that integrates educational, social, economic, and political security objectives. While primarily designed to harmonise higher education systems and ensure comparability of qualifications within the European Higher Education Area, the Bologna Process also functions as a strategic instrument for strengthening social cohesion, reducing educational inequalities, and fostering inclusive and resilient societies. In this sense, education becomes a key component of human and societal security, contributing to the prevention of radicalisation and the consolidation of a shared European identity.

Erasmus+ and other mobility schemes further reinforce this dimension by operating as mechanisms of academic diplomacy and soft power, promoting intercultural dialogue, mutual understanding, and cooperation between European states. These processes support European integration and contribute to regional stability and peacebuilding. At the same time, the digital transformation of higher education introduces new security challenges, including cybersecurity, data protection, and academic integrity, which are increasingly embedded within the Bologna framework. From an economic perspective, the harmonisation of competencies enhances labour market adaptability, employability, and competitiveness, thereby reinforcing economic security. Additionally, universities contribute to democratic resilience through the development of critical thinking and media literacy, supporting resistance to disinformation and extremism.

Overall, these interconnected processes position higher education as a central pillar of a secure, cohesive, and knowledge-based European society.

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THE RIGHT TO FREEDOM OF EXPRESSION AND THE RECOGNITION OF SIGN LANGUAGE COMMUNICATION WITHIN THE DEAF/HOH COMMUNITY

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Abstract:

The paper explores the fundamental rights related to Freedom of Expression and the Recognition of Sign Language as outlined by human rights law, in accordance with UNCRPD. It also examines the core principles and frameworks for the Deaf/HoH Community under this national law in the country's context, which aim to eliminate barriers to Sign Language.

Protection and Recognition are essential, particularly in public institutions. This involves adopting regulations, policies, mechanisms, and other procedures to prevent discrimination against Deaf Individuals and Communities, while also promoting the implementation of a suitable new national law. The framework emphasizes the value of judgment, dignity, and respect for Deaf individuals' rights, without discrimination.

The aim of research in public policy and regulation. is to ensure that the World Federation of the Deaf's findings help adapt national acts on Sign Language Recognition in countries where such laws exist, and that the Deaf community adopts them to achieve those objectives. The paper aims to explore Deaf Studies and Sign Language, focusing on 82 countries with a recognized Sign Language Status Act and 111 countries without such recognition.

Keywords: sign language recognition; public policy; non-discrimination; Deaf community; human rights; legal framework

Introduction

In Sign Language recognition studies, researchers have examined the policy framework for ensuring the rights of the Deaf Community, particularly with respect to the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) obligations regarding key aspects of the furthest extent possible quality standards regulation, and the social policy framework. These are frequently used to protect the Deaf community's rights, to combat barriers to communication in Sign Language, especially between different concepts and ideas in the national legal and policy frameworks, to promote the fundamental rights to freedom of expression, and to ensure that Deaf cultural identity, traditions, and sports remain an integral part of their community.

The role of Sign language in Deaf Education is also to ensure monitoring of the implementation process, such as in schools for the Deaf, in accordance with the UNCRPD, where potential measures to address and reduce barriers are specifically aimed at making Sign Language Accessible. This may include, where stipulated by national law in each

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respective country, the obligation of the national authorities to implement measures to overcome barriers to communication between Deaf and hearing people.

This paper examines an academic interest in Deaf Studies that has increased in recent decades, and the Deaf community's focus on combating discrimination, marginalization, and exclusion in Deaf society, as well as in the workplace, access to information, efficiency, and a prospective study on the resolution of the Sign Language recognition, which it intends to take, is based on reasons for doing so in the Deaf community.

Recent updates from the WFD highlight that Joseph J. Murray, a University Professor at Gallaudet University in Washington, D.C., and President of the WFD, states that Bolivia has passed a new law that officially recognizes Bolivian Sign Language (LSB). This milestone forward in linguistic rights. It solidifies LSB as a legitimate mode of communication across social, educational, cultural, political, and economic spheres for the Deaf community[1]. This is a development of previous WFD resolutions regarding Bolivia's recognition of Sign Language, which also references the UNCRPD mechanism.

In the context of the World Federation of the Deaf, prior research in Deaf Studies and Sign Language has contributed to the evolving concept of a human rights-based approach to Sign Language Recognition. This development aims to align legislation with international standards concerning legal capacity and human dignity for the Deaf Community. Currently, 82 countries recognize Sign Language through regulations, policies, and methodologies, including 37 in Europe, 20 in South / North America, 11 in Asia and the Middle East, 9 in Africa, and 5 in Oceania, supported by national laws. Evidently, 111 countries have adopted laws consistent with the Conventions on Disability Rights, including 42 in Africa, 33 in Asia and the Middle East, 15 in South and North America, 11 in Europe, and 10 in Oceania. However, these regulations often face issues leading to national laws that do not support Sign Language Recognition. With the exception of several Western countries that have laws protecting Disability rights and Sign Language interpretation, most other countries do not. The Western region aims to secure legal recognition for various sign languages, with the fundamental objective of sign language recognition in future legislation through stronger legal systems.

The research contributes to the existing literature on Deaf Studies by providing a comparative overview of how Sign Languages (SLs) are legally recognized, based on data available from the WFD. It analyses the distribution of countries that have adopted legal recognition and those that have not. The paper explores the links between sign language recognition, freedom of expression, and the implementation of international human rights under the UNCRPD, considering legal frameworks and policy developments. It highlights the importance of sign language in supporting the national laws that safeguard Deaf/HoH communities.

The Recognition Space in the Sign Language and Deaf Communication

The recognition of Sign Language is essential, as part of the "freedom of expression and opinion" as cited by Hilde Haualand, as outlined in the *Convention on the Rights of People with Disabilities*, adopted by the United Nations, stating that without Sign Language, the Deaf face a lack of access to vital information, a lack of technology and communication, and the ability of unself-expression in Sign Language. Haualand aimed to eliminate barriers and ensure the freedom of expression and access to information through Deaf Community

[1] World Federation of the Deaf, "*Recognition of Bolivian Sign Language*", https://wfdeaf.org/recognition-of-bolivian-sign-language/ (20.02.2026)

Communication. This includes sharing opinions, participating in discussions, and accessing educational opportunities, workplaces, religious, and non-governmental organizations within the Deaf community. It also covers Sign Language interpretation, recognizing and promoting Sign Language as a human right, aligned with the International Sign Language for linguistic, cultural, and traditional communities, in accordance with the UNCRPD[1].

From this point of view, the principle of linguistic dignity is legally recognized as a fundamental protection, playing a vital role in ensuring the Sign Language, which is an integral part of cultural identity, and societal knowledge of the study of Deaf Studies and its "practical effects in the different spheres of daily life"[2]. The lack of recognition is a problem that, if solved, will result in preventing and reducing the risk of exclusion and marginalization of the deaf society[3], highlighting the importance of legal recognition to avoid exclusion and discrimination against the Deaf community, or Deaf individuals.

The aspects of legal recognition, as outlined in the goals and recommendations of the World Federation of the Deaf (WFD), including the International Sign Language guidelines, regulations, and national laws, are a priority in light of the *UNCRP* regarding the protection of rights of the Deaf Community. This pertains to national states and the legal recognition standards for Sign Language. For instance, Deaf organizations must address the fundamental issue of ensuring human rights through legal recognition within their respective countries.

Ferri Delia and Ann Leahy highlighted the significance of *Implementing the Right of Persons with Disabilities to Participate in Cultural Life*, with a particular focus on Deaf cultural and linguistic identity. They are explicated and will be justified as necessary to protect the Sign Language and Deaf community culture. The roles outlined by the CRPD are key in promoting Deaf education through bicultural and bilingual approaches, as endorsed by the World Federation of the Deaf. According to the CRPD report, States Parties (Member States of the respective country) are obligated to take measures to safeguard the rights of Sign Language. This includes independent recognition and the case of official languages and national laws, such as those in European countries, Austria, Estonia, Germany, Ireland, and the UK. In Romania, Romanian Sign Language is recognized as the mother tongue of the Deaf/HoH Community[4]. Several member states of the European Union are obligated to promote the use of national sign language in the legislative process in a fair, transparent, and non-discriminatory manner. This is because national legislation must comply with the CRPD and the EU Convention on Human Rights, both of which are binding. Consequently, research studies identify criteria and priorities for the Deaf Community in cultural and participation life.

This issue is discussed in relation to the regulation of *UNCRPD and Sign Language Peoples* as one of the areas supporting the protection of Sign Language as a human rights treaty for the Deaf community. The topics of interest include the following:

1) focusing on the protection and promoting recognition of SLs at the European Union level;
2) recognizing the SLs as aligning to ensure communication;

[1] Haualand Hilde, *Sign Language Interpreting: A Human Rights Issue*, "International Journal of Interpreter Education", Vol. 1, No. 1, 2009, https://tigerprints.clemson.edu/ijie/vol1/iss1/7, pp. 98-99

[2] Venade de Sousa Filipe, *Essential Framework of the Legal Status of Sign Language: Recognition and Officiality*, "Revista De Llengua I Dret", No. 7, 2022, doi: 10.2436/rld.i78.2022.3843, pp. 180-181

[3] *Idem*

[4] Delia Ferri, Ann Leahy, *Dismantling Barriers and Advancing the Right of Persons with Disabilities to Participate in Cultural Life: A Socio-Legal Analysis*, Routledge, Interdisciplinary Disability Studies, 2025, p. 114

3) guaranteeing the right to use them in interactions and official national sign language settings;
4) facilitating interaction, information access, and expression;
5) emphasizing education, including the fundamental rights to qualified sign language teachers and access to appropriate Deaf education;
6) legal accessibility for individuals with disabilities to justice systems is guaranteed through fully reasonable accommodations, such as closed captions and authorized sign language interpreters for Deaf individuals or communities;
7) acknowledging the existence of Deaf cultural and identity, including their use of SLs[1].

These principles regarding the rights of persons with disabilities highlight the need, in some countries, for guidelines that align with the UNCRPD at the appropriate level for the Deaf/HoH community and individuals who require reasonable accommodation. These national policies should also be supported to ensure effective, non-discriminatory, and necessary access.

These Sign Languages constitute a cultural and linguistic minority, as the international Deaf Community, represented by the World Federation of the Deaf, has attained under national laws, which are guaranteed in accordance with the provisions of the International Convention[2] on Disability in relation to Human Rights, thereby ensuring legal recognition.

In relation to the regulations, treaties, and national laws in every country on the Human Rights Convention for Persons with Disabilities, in the interpretation of the principles of Sign Language and Deaf Education, respectively, it's obligatory to respect a fundamental aspect of freedoms of expression and opinions. Considering these points regarding the recognition and protection of Sign Language, public policies have been developed to prevent discrimination against Deaf individuals. These policies focus on legal principles, covering areas such as education, interpreting, and cultural and identity issues.

The World Federation of the Deaf's Strategy on the Recognition and Protection of Rights Policy for the National Sign Languages

The World Federation of the Deaf endorses its role in supporting national organizations within the Deaf community, particularly in the cultural, educational, sporting, and moral dimensions. The WFD efforts focus on ideas and initiatives that promote Sign Language as a first language and as an educational medium. In the event of consensus, the World Congress States affirms the following "Recommendations of the Commission on Sign Language" from 1991, emphasizing that they should be robust, action-oriented, and effective, and that they are recognized as Deaf education. Specifically, recognizing National Sign Languages as essential for the Deaf Community is paramount[3].

The International legal and policy contexts outlined by the WFD for the Deaf Communities' self-identification as a linguistic-cultural-traditional-sport-bilingual group are

[1] De Meulder Maartje, *The UNCRPD and Sign Language Peoples*, in A. Pabsch (Ed.), "UNCRPD Implementation in Europe-A Deaf Perspective. Article 29: Participation in Political and Public Life", European Union of the Deaf, 2014, https://jyx.jyu.fi/bitstreams/fb875781-8c57-44fd-9250-942657c0bb24/download, pp. 9-10

[2] United Nations General Assembly, *Convention on the Rights of Persons with Disabilities, Resolution A/RES/61/106*, 13 December 2006, https://www.ohchr.org/en/instruments-mechanisms/instruments/convention-rights-persons-disabilities (12.02.2026)

[3] Jan Branson, Don Miller, *Nationalism and the Linguistic Rights of Deaf Communities: Linguistic Imperialism and the Recognition and Development of Sign Languages*, "Journal of Sociolinguistics", Vol. 2, 1998, DOI: 10.1111/1467-9481.00028, pp. 25-26

grounded in the human rights of minority groups to use their language. These rights are understood as linguistic human rights, including the need to recognize and promote one's own "mother tongue" and sign language communication. In this regard, both UNCRPD and the UNESCO – Convention Against Discrimination in Education, adopted in 1960, recognize that minority language rights for the Deaf Community in the school, university, and professional training, which are obligations under international human rights treaties, would have the same status as the WFD, and shall be determined under official recognition and promotion of Sign Language[1]. The provisions of both the UNCRPD and UNESCO are comprehensive measures against discrimination and encompass all aspects related to Deaf accessibility, and the promotion of Sign Language, aiming to promote human rights.

On the other hand, necessary aspects of the WFD must be analyzed and discussed, especially regarding the *Recognition of Sign Language Under International Law*, as explored by Meereboer, Spijkers, and Meereboer. They examine whether Sign Languages possess a public policy nature and if the WFD helps fulfill Deaf rights. Although this perspective has not yet been officially adopted, it is considered fundamental by the Deaf community. Specifically, one of the key articles has demonstrated that state parties are obligated to guarantee that deaf or deafblind individuals or communities can express themselves and communicate in Sign Language, some through Braille, and others through their preferred accessible information methods, thereby ensuring equal access with others[2].

In China, sign language legislation refers to protections under various systems, such as "local sign language" and "national sign language". China's National Legislation has inadequately addressed local sign language. Despite efforts by the Chinese Deaf Community to promote and recognize the national sign language, which can integrate national differences between local and national levels, the Chinese government promotes and protects the nationalization, standardization, and uniformity of Sign Language[3]. The Government of China has not yet officially recognized Chinese Sign Language, including national and local sign languages, according to the World Federation of the Deaf[4]. This obligation serves as a guiding instrument for recognizing the rights of the Deaf Community and ensuring the practice of the two sign languages, the national sign language and the local sign language.

The Officially Recognized Sign Languages in Various Countries

The latest data from the World Federation of the Deaf shows that 193 countries have laws either recognizing or not recognizing Sign Language, as detailed in Tables 1 and 2.

Table 1 demonstrates that legal recognition often serves as a normative interpreter authorization in Sign Language, in police stations in cases involving Deaf individuals, the

[1] Victoria Manning, Joseph J. Murray, Alexandre Bloxs, *Linguistic Human Rights in the Work of the World Federation of the Deaf*, in Tove Skutnabb-Kangas; Robert Phillipson (Eds.), "The Handbook of Linguistic Human Rights", Hoboken, NJ: Wiley-Blackwell, 2023, https://www.researchgate.net/profile/Tove-Skutnabb-Kangas/publication/369197901_Introduction_Establishing_Linguistic_Human_Rights/links/641359a066f8522c38ad79a6/Introduction-Establishing-Linguistic-Human-Rights.pdf, pp. 270–271

[2] Swen Meereboer, Kika Meereboer, Otto Spijkers, *Recognition of Sign Language under International Law: A Case Study of Dutch Sign Language in the Netherlands*", "Netherlands Yearbook of International Law 2017: Shifting Forms and Levels of Cooperation in International Economic Law: Structural Developments in Trade, Investment and Financial Regulation", TMC Asser Press, 2018, p. 421 https://pure.eur.nl/ws/portalfiles/portal/100601764/978-94-6265-243-9_13.pdf,

[3] Zhuiwen Lai, Zhengzong Huang, Ya Wen, Jinmei Feng, *Enhancing Sign Language Recognition and Accessibility for the Deaf Community in China*, "Disability&Society", Vol. 40, No. 9, 2024, DOI: 10.1080/09687599.2024.2412271, p. 2628

[4] *Ibidem*, p. 2626

justice system, and within public administration. Additionally, the regulatory claims for political participation accessibility encompass access to voting and electoral information throughout democratic processes, for example, among the various Sign Language interpretation activities in TV programs.

In various countries, Europe demonstrates stronger legal recognition due to supranational institutions, such as the European Union and the Council of Europe, which provide human rights protections and frameworks (e.g., recognized official language, the guarantee of legal mechanisms protection). In this study, legal recognition specifically refers to the National Association of the Deaf and other NGOs' support in Europe for the "Sign Language Act" from an initiative proposed by Deaf community organizations and endorsed by the national parliament. The educational access includes bilingual Deaf education, Sign Language curriculum, and instruction aimed at teaching, adapting reasonably for learning, and evaluating Deaf pupils within the school.

In South and North America, public institutions are acknowledged and respected under the UNCRPD Convention on disability rights, which was initiated by the World Federation of the Deaf, aligning with information about the Deaf Community's Rights.

In Asia and the Middle East, it may be influenced by the UNCRPD, which has assumed a stronger role in international norms through the adoption of the Disability Acts, in some democracies and totalitarian systems, thereby supporting the Deaf community.

In Africa, 9 (nine) nations are the relevant international standards, particularly those concerning the Deaf community.

In Oceania, there are still nations with a devoted attitude toward the Deaf community; however, the focus is on perspectives on Sign Language Recognition.

Europe	South/North America	Asia and Middle East	Africa	Oceania
Albania	Argentina	Azerbaijan	Angola	Fiji
Austria	Bolivia	Bangladesh	Eswatini	Marshall Islands
Belarus	Brazil	India	Kenya	Mongolia
Belgium	Canada	Indonesia	Lesotho	New Zealand
Bosnia and Herzegovina	Chile	Japan	Malawi	Papua New Guinea
Bulgaria	Colombia	Malaysia	Namibia	
Croatia	Costa Rica	Nepal	South Africa	
Cyprus	Cuba	Philippines	Uganda	
Czech Republic	Dominican Republic	South Korea	Zimbabwe	
Denmark	Ecuador	Turkey		
Estonia	El Salvador	Uzbekistan		
Finland	Guatemala			
Germany	Honduras			
Greece	Mexico			
Hungary	Nicaragua			
Iceland	Panama			
Ireland	Paraguay			
Italy	Peru			
Kosovo	Uruguay			
Latvia	Venezuela			
Lithuania				
Luxembourg				
Malta				
North Macedonia				
Norway				
Poland				

Portugal Romania Russian Federation Serbia Slovakia Slovenia Spain Sweden The Netherlands Ukraine United Kingdom				
37	20	11	9	5

Table 1. The 82 Nations with Officially Recognized Sign Languages[1]

Table 2 indicates that countries in Africa, Asia, the Middle East, South and North America, Europe, and Oceania that lack legislation and do not legally recognize sign language, as evidenced by the absence of a simple law on the rights of persons with disabilities.

In this context, the baseline for comparing the analytical coherence of Table 1 was to examine countries that lack sign language recognition. These issues impact part of the Deaf community by affecting communication, interpretation in Sign Language, and human rights.

Africa	Asia and Middle East	South/North America	Europe	Oceania
Algeria Benin Botswana Burkina Faso Burundi Cameroon Cape Verde Central African Chad Comoros R. of the Congo Côte d'Ivoire R. D. of the Congo Djibouti Egypt Equatorial Guinea Eritrea Ethiopia Gabon Gambia Ghana Guinea Guinea-Bissau Liberia Libya Madagascar Mali	Afghanistan Bahrain Bhutan Brunei Cambodia China Iran Iraq Israel Jordan Kazakhstan Kuwait Kyrgyzstan Laos Lebanon Maldives Myanmar North Korea Oman Pakistan Palestine Qatar Saudi Arabia Singapore Sri Lanka Syria Tajikistan	Antigua/ Barbuda Bahamas Barbados Belize Dominica Grenada Guyana Haiti Jamaica Saint Kitts/ Nevis Saint Lucia Saint Vincent and the Grenadines Suriname Trinidad/ Tobago United States of America	Andorra Armenia France Georgia Liechtenstein Moldova Monaco Montenegro San Marino Switzerland Vatican	Australia Kiribati Micronesia Nauru Palau Samoa Solomon Islands Tonga Tuvalu Vanuatu

[1] World Federation of the Deaf, *Sign Language Recognition Map*, https://wfdeaf.org/wp-content/uploads/WFD_Sign-Language-Recognition-Map_20261201-1.pdf (13.02.2026)

Africa	Asia and Middle East	South/North America	Europe	Oceania
Mauritania Mauritius Morocco Mozambique Niger Nigeria Rwanda São Tomé/Príncipe Senegal Seychelles Sierra Leone Somalia South Sudan Togo Tunisia	Thailand Timor-Leste Turkmenistan United Arab Emirates Vietnam Yemen			
42	33	15	11	10

Table 2. The 111 Nations Without Officially Recognized Sign Languages[1]

The frequency presented in Table 2 also underscores a disregard for the basic limitations of human rights regarding specific practices, such as Sign Language for the Deaf community. Considering these practices as insufficient grounds for restricting core can cause unforeseen and severe consequences.

Several nations believe that, based on human rights and civil rights, the United States of America has sufficient "civil rights", such as the Americans with Disabilities Act and other similar measures, within the context of American Sign Language and Deaf Studies.

In Europe, countries such as France, Switzerland, and Moldova have human rights policies that support the Deaf community, including interpretation facilitating in French Sign Language, Swiss-German Sign Language, and Moldavian-Romanian-Russian Sign Language.

In this respect, Australia, China, Israel, Jordan, Qatar, Saudi Arabia, Singapore, Thailand, and the United Arab Emirates are similar to the Deaf Community. The data available from the World Federation of the Deaf offers a comparative overview of the global distribution of legal recognition of SLs. Based on these data, the present study examines differences between countries and regions with legally recognized national protection and those without such recognition and protection that have yet to be adopted. This comparison allows the identification of disparities in legal recognition and protection, highlighting the implications for the realization of the UNCRD and for the exercise of rights within Deaf / HoH communities.

In this respect, the World Federation of the Deaf sets out the following specifications related to the process of accessing information and communication in their daily lives. For instance, the report views the absence of effective recognition sign language legislation as a serious violation of the fundamental rights of deaf people, as documented in human rights[2].

Table 1 presents the average results for Europe, America, Asia, the Middle East, Africa, and Oceania across different situations regarding the extent of sign language

[1] *Idem*

[2] World Federation of the Deaf, "*The Legal Recognition of National Sign Languages*", WFD, https://wfdeaf.org/the-legal-recognition-of-national-sign-languages/ (16.02.2026)

recognition in countries that have enacted laws for Deaf/HoH communities, as shown in Figure 1.

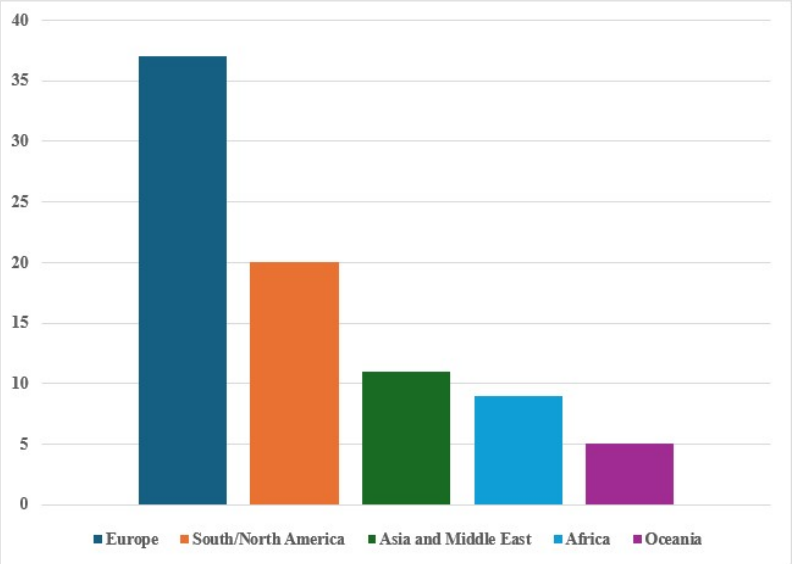

Figure 1. Regional Comparison of Countries Recognizing National SLs

Figure 1 illustrates the regional distribution of countries that adopted legal recognition and national SLs recognition in various legal recognition settings. The figure provides a comparative visualization of the number of countries across different regions where SLs are adopted and recognized through legislation or official policies.

Table 2 indicates that countries in Africa, Asia, the Middle East, South and North America, Europe, and Oceania that lack legislation do not legally recognize sign language, as evidenced by the absence of a simple law on the rights of persons with disabilities.

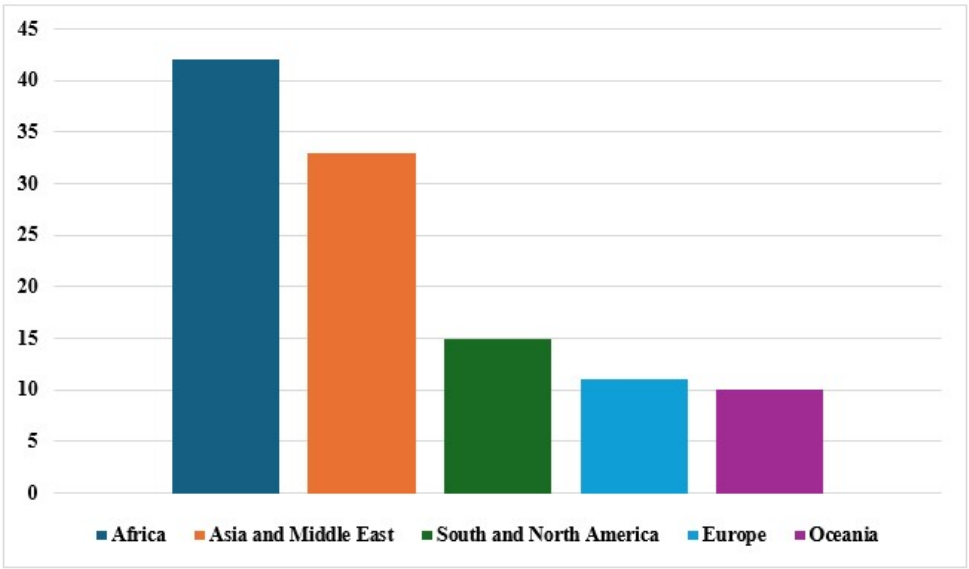

Figure 2. Regional Comparison of Countries Without Legal Recognition of SLs

Figure 2 presents the regional distribution of countries where sign languages have not yet been legally recognized and protected. The comparison between 5 (five) regions highlights significant disparities in the implementation of legal frameworks protecting the linguistic rights of Deaf/HoH communities, which may lead to the failure of legislative protection of the Sign Language addressed to the Deaf Community, and it is often an act of discrimination, but a part of the protection of people with disability was sufficient to human rights international treaties in accordance with UNCRPD under legal conditions relating to the fundamental rights recognized.

This study provides the raw data for a comparative overview of the legal recognition of SLs and highlights regional disparities in legal frameworks and policies. It underscores the importance of legal SLs in ensuring freedom of expression and equal access to information for Deaf and HoH communities.

Analyses of reports from the World Federation of the Deaf reveal the consequences of the absence of recognition of sign language, as shown in Figure 2, which presents data for 111 countries across Africa, Asia, the Middle East, South and North America, Europe, and Oceania. Specifically, aside from "legislative violations to equal rights in society, the lack of recognition of sign language as the natural language of the Deaf and very limited access to educational programs make deaf persons disadvantaged in their desire for full participation in society and overall equalization of opportunities"[1]. The United States of America has strong protections of the Deaf community, more so than many other countries. This includes support from the Americans with Disabilities Act and from organizations, such as the National Association of the Deaf and Gallaudet University.

Conclusions

This article has examined the evolution of Sign Language recognition, which is essential for effective communication within the Deaf Community, and is recognized as a vital aspect of international human rights. The World Federation of the Deaf is increasingly concerned about the recognition of legal national Sign Language in Deaf Education, culture, traditional, and sport practices within nongovernmental organizations. NGOs within the Deaf Community have developed strategies that provide sufficient support and foster effective decision-making. These efforts support Deaf communication and help develop the skills needed to make country-owned decisions that facilitate the use of Sign Language interpretation.

In terms of human rights decision-making, the UNCRPD approach within the Deaf community supports the roles of science, Deaf Studies, and research papers. All of these are recognized as playing important roles in sign language communication skills and in the ability to live independently in freedom and dignity. The measures of the CRPD must be adopted by countries to protect the recognition of Sign Language and to support the World Federation of the Deaf's fair and balanced approach, and they require value judgments and justifications for the Deaf Community regarding appropriate national laws and policies. The International legal and policy issues facing the World Federation of the Deaf establish a framework for recognizing Sign Language. This considers the view that national human rights laws are vital, and that effective Deaf communication with NGOs' target groups is key to their recognition.

[1] Marjo Joutselainen, „Deaf People in the Developing World", in Peter Mittler, Ron Brouillette, Duncan Harris (eds.), *World Yearbook of Education 1993: Special Needs Education*, Oxford: Routledge, 2006, pp. 85–86.

This would be the official recognition of Sign Language to promote the Deaf community, helping them adopt an official procedure to advance their capabilities, combat discrimination, and overcome communication barriers with hearing people. Several countries should, without delay, establish a new legislative process on Sign Language Recognition in relation to the UNCRPD and begin the process for its official recognition, dedicated to Deaf Education, Culture, and related areas. This is also clearly demonstrated by data from the World Federation of the Deaf, which is widely regarded as the most authoritative source on Sign Language Laws, which indicate that every country should continue to ensure that its Deaf communities are not subjected to barriers or discrimination.

The study contributes to the discussion on sign language recognition and protection by providing a global comparative overview of the legal status of national SLs and highlighting disparities across regions in the implementation of legal frameworks that protect the linguistic rights of Deaf /HoH communities. The findings of this study demonstrate that the recognition of SLs is closely linked to the protection of fundamental human rights, particularly the right to freedom of expression and access to information dedicated to the Deaf community. Although several countries have adopted legal frameworks that recognize national SLs, significant global issues remain. The analysis highlights the importance of legal and policy frameworks to ensure that Deaf/HoH communities can fully exercise their linguistic, cultural, and language rights without discrimination.

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CRISIS REPATRIATION AND INFORMATION WARFARE: IS THE ROMANIAN STATE PREPARED FOR EXCEPTIONAL SECURITY SITUATIONS?

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Abstract

This article explores whether the Romanian state is adequately prepared to respond to exceptional security situations involving the repatriation of its citizens from conflict-affected areas. The analysis focuses on two recent cases: the evacuation of Romanian private contractors from the Democratic Republic of Congo, following the rapid advance of the M23 rebel group in Goma, and the repatriation of Romanian civilians from the Middle East in a context of increasing regional instability. While both operations highlight a certain level of institutional capability, they also reveal significant vulnerabilities, particularly in terms of coordination, communication, and political interference.

In the case of the Congo mission, public narratives labelling legally contracted personnel as "mercenaries" raise questions about information management and media influence. Similarly, controversies surrounding evacuation decisions in the Middle East case suggest the presence of political pressure affecting operational priorities. Using a qualitative approach based on case study analysis, the article argues that although Romania possesses functional mechanisms for crisis response, these are often undermined by inconsistent strategic communication and politicization. The study contributes to ongoing debates on hybrid threats and emphasizes the need for more resilient and depoliticized crisis management frameworks.

Keywords: crisis repatriation; disinformation; hybrid threats; Romania; state capacity

Introduction

The increasing frequency of complex security crises in recent years has fundamentally reshaped the responsibilities of modern states toward their citizens abroad. Repatriation operations, once considered exceptional and rare, have become recurring challenges that test not only logistical capabilities, but also institutional coherence, political maturity, and strategic communication. In this context, the capacity of a state to protect its citizens outside national borders is no longer limited to operational readiness alone; it also depends on the ability to manage information, public expectations, and political pressures in highly volatile environments.

In the recent years, the obligation of states to ensure the safety of their citizens abroad has become increasingly visible and politically sensitive, particularly in contexts marked by instability and hybrid threats. This development has placed additional pressure on national

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institutions to respond effectively, not only operationally, but also in terms of communication and public accountability.

Romania, as a member of both the European Union and NATO, is expected to demonstrate a certain level of preparedness in responding to such crises. However, recent events suggest that while operational mechanisms may exist, their effectiveness can be significantly affected by factors that go beyond the technical sphere. Two relevant cases illustrate these dynamics: the repatriation of Romanian citizens involved in contractual activities in the Democratic Republic of Congo following the rapid advance of the M23 rebel group in Goma, and the evacuation of Romanian civilians from the Middle East amid deteriorating security conditions.

These cases are particularly significant not only because of the risks faced by those directly involved, but also due to public narratives that developed in the public space. In the Congo case, individuals who had been legally contracted were publicly labelled as "mercenaries", despite their professional background as reservists and veterans of the national defense and security system. Such framing raises important questions regarding the role of media, political actors, and institutional communication in shaping public perception during crises. Similarly, the Middle East evacuation case generated controversy due to alleged political interference in the prioritization of evacuees, which further fueled public distrust and speculation.

The interaction between crisis management and information dynamics is not new. However, in the current security environment, characterized by hybrid threats, rapid information dissemination, and increasing polarization, these interactions have become more visible and more consequential. Disinformation, narrative manipulation, and politicization can undermine not only public trust, but also the operational effectiveness of state institutions.

Against this backdrop, the present article seeks to address a central question: to what extent is the Romanian state prepared to manage exceptional repatriation situations, and can institutional actors operate effectively in the presence of political and media pressures? By examining the two aforementioned cases, the study aims to identify both strengths and vulnerabilities within Romania's crisis response framework, with a particular focus on the intersection between operational capability and information management.

The article adopts a qualitative approach based on case study analysis, drawing on publicly available information, media reports, and existing literature in the fields of security studies, crisis management, and information warfare. The objective is not to provide a definitive assessment, but rather to contribute to a broader understanding of how modern states navigate complex security situations in an increasingly contested informational environment.

Literature Review

The growing complexity of contemporary security environments has generated an extensive body of literature addressing the evolving nature of state responsibilities, crisis management, and hybrid threats. In particular, the intersection between operational security and the information domain has become a central focus within security studies, reflecting the increasing relevance of non-kinetic dimensions of conflict.

A key concept underpinning this analysis is state capacity, which refers to the extent to which public institutions are able to formulate and carry out policies, particularly in situations of crisis or emergency. Scholars such as Francis Fukuyama argue that state capacity is not limited to formal structures, but also includes coordination, legitimacy, and the

ability to respond coherently under pressure[1]. This perspective is particularly relevant in the context of repatriation operations, where multiple institutional actors must act in a synchronized manner under conditions of uncertainty.

Closely related is the field of *crisis management*, which has traditionally focused on preparedness, response, and recovery phases. According to Arjen Boin and his collaborators, effective crisis management requires not only operational readiness but also the capacity to manage meaning, that is, to shape public understanding of the crisis[2]. This dimension becomes critical in situations where media narratives and political discourse can influence both public perception and institutional legitimacy.

The concept of *hybrid warfare* further expands the analytical framework by integrating conventional and unconventional means of conflict. Frank G. Hoffman defines hybrid threats as the simultaneous use of military, irregular, and informational tools to achieve strategic objectives[3]. In recent years, this concept has been increasingly associated with the use of *disinformation* and *information manipulation* as instruments of influence, particularly in democratic societies.

The role of information in shaping security outcomes has been extensively analyzed within the literature on *information warfare*. Scholars such as P. W. Singer and Emerson T. Brooking highlight how the digital environment enables rapid dissemination of narratives that can distort reality, amplify tensions, and undermine trust in institutions[4]. In such contexts, the line between domestic political communication and strategic information operations can become increasingly blurred.

Disinformation, as a subset of information warfare, has been recognized as a major challenge for modern states. According to the European Commission, disinformation consists of information that is deliberately created or shared in a misleading manner with the intention of deceiving audiences[5]. Research has shown that disinformation campaigns can have tangible effects on public opinion, electoral processes, and crisis responses[6]. In this context of security crises, such as evacuations or repatriations, misleading narratives can generate confusion, erode trust, and place additional pressure on decision-makers.

A further body of research addresses the ways in which security issues become subject to political framing and instrumentalization. As noted by scholars like Didier Bigo, security issues are often framed in ways that serve political agendas, particularly in democratic systems where public perception plays a crucial role[7]. This politicization can lead to the prioritization of symbolic actions over operational effectiveness, especially in high-visibility situations such as crisis evacuations.

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[1] Francis Fukuyama, *State-Building: Governance and World Order in the 21st Century*, Cornell University Press, 2004, pp. 3-10

[2] Arjen Boin, et al., *The Politics of Crisis Management: Public Leader Under Pressure*, Cambridge University Press, 2006, pp. 1-8

[3] Frank G. Hoffman, *Hybrid Warfare and Challenges*, "Joint Force Quarterly", No. 52, 2009 https://doi.org/10.4324/9781315814803-35

[4] P. W. Singer, Emerson T. Brooking, *LikeWar: The Weaponization of Social Media*, Houghton Mifflin Harcourt, 2018, pp. 21-30

[5] European Commission, *Code of Practice on Disinformation*, 2018, https://digital-strategy.ec.europa.eu/en/library/2018-code-practice-disinformation (21.04.2026)

[6] Soroush Roy, Deb Vosoughi, Aral Sinan, *The spread of true and false news online*, "Science", 2018, DOI: 10.1126/science. aap9559

[7] Didier Bigo, *Security and Immigration: Toward a Critique of the Governmentality of Unease*, "Alternatives", Vol. 27 (1), 2002, pp. 63-92 https://doi.org/10.1177/03043754020270S10

In parallel, studies on *civil-military relations* and the use of private security actors provide important insights into the Congo case. The increasing reliance on private contractors in conflict zones has been widely documented, with scholars noting both the operational advantages and the legal and ethical ambiguities associated with such arrangements[1]. The labeling of such actors as "mercenaries" often reflects political or media narratives rather than precise legal definitions, contributing to public misunderstanding.

Furthermore, the literature on *strategic communication* emphasizes the importance of coherent and transparent messaging during crises. According to research conducted by institutions such as NATO, effective communication can enhance resilience, counter disinformation, and support operational objectives[2]. Conversely, inconsistent or politically influenced messaging can have the opposite effect, amplify uncertainty and undermine institutional credibility.

Finally, recent studies have highlighted the challenges posed by *rapid information cycles* and social media ecosystems. The speed at which information circulates today leaves little room for verification, increasing the risk of narrative distortion[3]. In such environments, even isolated incidents can be amplified and transformed into broader controversies, as appears to be the case in both scenarios analyzed in this article. Taken together, this body of literature provides a comprehensive framework for understanding the complex interplay between operational capacity, information dynamics, and political factors in crisis situations. It also underscores the need for an integrated approach that goes beyond traditional security paradigms, incorporating elements of communication, governance, and societal resilience.

Methodology

The present study adopts a qualitative research design, centered on a comparative case study approach, in order to examine the Romanian state's capacity to manage exceptional repatriation situations under conditions of heightened security risk. This methodological choice is particularly suitable given the exploratory nature of the research question and the complexity of the phenomena under analysis, which involve institutional behavior, information dynamics, and political context.

The analysis focuses on two recent and distinct cases: the repatriation of Romanian citizens involved in contractual activities in the Democratic Republic of Congo, following the advance of the M23 rebel group in the city of Goma, and the evacuation of Romanian civilians from the Middle East amid deteriorating regional security conditions. These cases were selected based on their relevance, temporal proximity, and the presence of both operational and informational challenges, allowing for a comparative perspective.

Data collection relies primarily on open-source materials, including official statements, media reports, and publicly available documentation. While such sources may present certain limitations in terms of completeness or potential bias, they are also essential for capturing the information environment surrounding the events, which constitutes a central dimension of the analysis[4]. In addition, the study draws upon existing academic literature in

[1] P. W. Singer, *Corporate Warriors: The Rise of the Privatized Military Industry*, Cornell University Press, 2007, pp. 15-25

[2] NATO Strategic Communications Centre of Excellence, *Strategic Communications Handbook*, 2017 https://mpsotc.army.gr/wp-content/uploads/2025/07/NATO-StratCom-Handbook-2017.pdf

[3] Maria Haigh, et al., *Information Literacy vs. Fake News*, "Open Information Science", Vol. 3(1), pp. 154-165, DOI:10.1515/opis-2019-0011

[4] Arjen Boin, et al, *Governing After Crisis: The Politics of Investigation, Accountability and Learning*, Cambridge University Press, 2008, pp. 7-15

the fields of security studies, crisis management and information warfare, as outlined in the previous section. The analysis is based on a qualitative triangulation strategy, combining multiple types of sources in order to reduce potential bias. Media reports are cross-referenced with official statements and secondary academic literature where available. Although access to primary data such as interviews or internal documents was not possible, the study mitigates this limitation by comparing independent sources and identifying converging patterns of information.

In this study, media narratives are treated primarily as objects of analysis rather than as definitive sources of factual evidence. Their role is to illustrate how public discourse is constructed and how perceptions are shaped during crisis situations, particularly in environments characterized by uncertainty and rapid information flows. From an analytical perspective, the study employs elements of process tracing and narrative analysis. Process tracing allows for the reconstruction of key events and decision-making sequences, highlighting institutional responses and coordination mechanisms[1]. At the same time, narrative analysis is used to examine how different actors, including media outlets and political figures, have framed the events, thereby influenced public perception and potentially affected institutional credibility. This study does not aim to offer a complete or definitive reconstruction of the events, but instead seeks to highlight recurring patterns, underlying tensions, and structural issues arising from the interplay between operational responses and the informational environment.

The analysis remains cautious in its interpretation of contested or sensitive aspects, relying on corroborated information and avoiding unverified claims. The methodological approach also reflects an awareness of the broader context in which modern security operations take place. As highlighted in recent scholarship, crisis response cannot be understood in isolation from the informational and political environments in which it unfolds[2]. Therefore, the study integrates these dimensions in order to provide a more comprehensive understanding of state preparedness and institutional resilience.

Case study I: Democratic Republic of Congo

The first case under examination concerns the repatriation of a group of Romanian citizens who were present in the eastern region of the Democratic Republic of Congo, particularly in and around the city of Goma. Their presence in the area was linked to contractual engagements with local authorities, reportedly involving training activities for the Congolese armed forces. The situation deteriorated rapidly following the advance of the M23 rebel group, which led to the effective loss of control over the city and created a highly volatile security environment. In this context, the Romanian citizens found themselves in a situation of acute risk, characterized by limited mobility, uncertain access to essential resources, and the constant threat of violence. Reports indicate that for several days, they remained in a precarious state, awaiting evacuation under conditions that can reasonably be described as critical. The subsequent repatriation operation, which resulted in their return to Romania, reflects the existence of functional mechanisms capable of facilitating extraction from conflict zones.

From an operational standpoint, the case suggests that Romanian authorities were able to coordinate, at least to a certain extent, the logistical aspects required for repatriation. This

[1] Alexander L. George, Andrew Bennett, *Case Studies and Theory Development in the Social Sciences*, MIT Press, 2005, pp. 67-80

[2] Louise K. Comfort, *Crisis Management in Hindsight*, "Public Administration Review", Vol. 67, pp. 189-197, 2007, https://doi.org/10.1111/j.1540-6210.2007.00827.x

includes diplomatic engagement, transportation arrangements, and post-arrival procedures. However, the effectiveness of such operations cannot be assessed solely in terms of logistical success; it must also take into account the broader institutional response, including communication strategies and the treatment of returning individuals.

A particularly sensitive aspect of this case relates to the *public framing* of the individuals involved. Despite indications that their presence in the Democratic Republic of Congo was based on legal contractual arrangements, a segment of public discourse, amplified by certain media narratives, labeled them as "mercenaries". This characterization, while not uncommon in discussions involving private security actors, carries significant normative and emotional weight, potentially influencing public perception in a negative manner. The use of such terminology raises important questions regarding the *accuracy and responsibility of public communication* during crisis situations. As highlighted in the literature, labels and narratives can shape not only how events are understood, but also how institutions are perceived[1]. In this case, the discrepancy between the legal status of the individuals and their public portrayal may have contributed to confusion, stigmatization, and a lack of clarity in the broader societal response.

Another aspect that warrants attention is the *post-arrival treatment* of the repatriated individuals. Reports indicating that they were subjected to medical checks, identification procedures, and questioning upon arrival are not, in themselves, unusual in the context of international crisis operations. However, the perception among some of those involved that these measures may have been conducted in a manner intended to generate media visibility introduces an additional layer of complexity. While relevant, the analysis distinguishes between verified facts and publicly expressed perceptions, particularly in relation to claims regarding the conduct of authorities and the interpretation of events.

Overall, the Congo case illustrates a dual dynamic. On the one hand, it demonstrates that the Romanian state possesses a certain capacity to intervene and repatriate its citizens under difficult conditions. On the other hand, it reveals vulnerabilities in the areas of *strategic communication*, *narrative management*, and *the depoliticization of security-related actions*.

Case study II: Middle East evacuation

The second case analyzed in this study concerns the repatriation of Romanian citizens from a region in the Middle East affected by a deteriorating security environment. In contrast to the Congo case, where the individuals involved were operating under contractual arrangements, this situation primarily involved civilians whose presence in the region was linked to personal, professional, or familial reasons. The escalation of tensions and the increasing risk to civilian populations necessitated the organization of evacuation measures by Romanian authorities.

From an operational perspective, the evacuation process reflects the existence of institutional mechanisms designed to respond to external crises affecting Romanian citizens abroad. These mechanisms typically involve coordination between the Ministry of Foreign Affairs, diplomatic missions, and other relevant state institutions, as well as cooperation with international partners when necessary. Such frameworks are consistent with broader European practices regarding consular protection and emergency response[2]. However, the case also generated public controversy, particularly in relation to the *prioritization of*

[1] Robert M. Entman, *Framing: Toward Clarification of a Fractured Paradigm*, "Journal of Communication", Vol. 43/4, pp. 51-58, 1993, DOI:10.1111/j.1460-2466.1993.tb01304.x

[2] European Union, *Consular Protection Directive (EU) 2015/637*, Official Journal of the European Union https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32015L0637 (21.04.2026)

evacuees. Media reports and public discussions raised questions about the criteria used in determining who would be evacuated and in what order. Allegations of preferential treatment, including references to the involvement of political figures in influencing decisions, contributed to a climate of suspicion and debate. In this context, it is important to distinguish between confirmed information and publicly circulated perceptions, especially when assessing allegations of political influence on operational decisions.

This situation highlights the inherent challenges associated with *decision-making under pressure*, where limited resources, time constraints, and evolving risks require rapid prioritization. In such contexts, even well-founded decisions can become controversial if they are not accompanied by clear and transparent communication. As emphasized in the literature on crisis governance, perceived fairness and procedural legitimacy are essential for maintaining public trust[1]. The controversy surrounding this case also illustrates the role of *media amplification* in shaping public discourse. In the absence of complete or verified information, isolated elements can be magnified and interpreted in ways that reinforce existing narratives about political influence or institutional bias. This dynamic is further intensified in digital environments, where information circulates rapidly and often without sufficient contextualization[2].

Another issue that deserves attention is how political leaders and administrative bodies work together in practice. In democratic systems, political oversight of executive action is both legitimate and necessary. However, when such involvement is perceived as interfering with operational processes, particularly in sensitive contexts such as crisis evacuations, it can generate tensions between political accountability and professional autonomy.

Overall, the Middle East case underscores the complexity of crisis response in contemporary settings. While the Romanian state appears to possess the institutional capacity to organize evacuations, the effectiveness of these operations is influenced not only by logistical factors, but also by issues of *transparency*, *communication*, and *the perceived integrity of decision-making processes*.

Information Manipulation and Media Narratives

The two cases analyzed in this article reveal a common and significant dimension: the role of information in shaping the understanding and perception of crisis situations. In both instances, public narratives evolved rapidly, often diverging from the available factual information and contributing to a complex informational environment.

In the case of the Democratic Republic of Congo, the characterization of Romanian contractors as "mercenaries" represents a particularly illustrative example of *narrative framing*. While the term itself has a specific legal meaning under international law, its use in public discourse is often broader and carries strong normative connotations[3]. The application of this label, in the absence of a clear contextualization, may have influenced public perception in ways that do not fully reflect the legal or operational realities of the situation.

Such framing can be understood within the broader context of *information dynamics in crisis situations*, where uncertainty, urgency, and limited access to verified information

[1] Arjen, Boin; Paul Hart, Allan McConnell, *Crisis Exploitation*, "Journal of European Public Policy", Vol. 16/1, 2009, DOI:10.1080/13501760802453221

[2] Manuel Castells, *Networks of Outrage and Hope: Social Movements in the Internet Age*, Polity Press, 2012, pp. 5-12

[3] Sarah V. Percy, *Mercenaries: The History of a Norm in International Relations*, Oxford University Press, 2007, pp. 1-10

create conditions conducive to the emergence of simplified or emotionally charged narratives. Existing research suggests that media organizations are pivotal in such contexts, not only disseminating information but also shaping how events are understood[1].

In the Middle East case, information dynamics manifested differently, but with comparable effects. The focus on alleged irregularities in evacuation prioritization, including references to individual cases, contributed to a narrative centred on potential political interference. Even in the absence of definitive evidence, such narratives can gain traction, particularly when they resonate with broader concerns about governance and accountability.

The dynamics are further intensified by the influence of social media platforms. Unlike traditional media, which operate within certain editorial frameworks, social media environments allow for the rapid dissemination of unverified or partially verified information. This can lead to the formation of parallel narratives, some of which may be inaccurate or misleading, yet still influential[2].

It is important to emphasize that information manipulation does not necessarily imply deliberate intent by all actors involved. Rather, it can emerge from a combination of factors, including selective reporting, interpretative biases, and the structural characteristics of contemporary information ecosystems. However, in certain cases, the possibility of *strategic narrative construction* – whether for political, reputational, or other purposes – cannot be entirely excluded.

The implications of these dynamics are significant. Beyond shaping public perception, information narratives affect the *legitimacy of institutions*, the morale of those directly involved in operations, and the overall effectiveness of crisis response. In this sense, information becomes not merely a reflection of events, but an integral component of the security environment itself.

Political Interference and Institutional Vulnerabilities

The analysis of the two case studies suggests that, beyond operational and informational challenges, a critical dimension affecting crisis response lies in the relationship between political authority and institutional autonomy. In democratic systems, political oversight is both legitimate and necessary; however, the boundary between oversight and interference can become blurred, particularly in high-pressure situations characterized by urgency, uncertainty, and public visibility.

In both cases examined, elements of *perceived politicization* emerged within public discourse. In the Congo case, the framing of repatriated individuals and the management of their return generated debates that extended beyond operational considerations, touching upon broader issues of legitimacy and narrative control. In the Middle East case, controversies related to evacuation prioritization raised questions about the influence of political actors on administrative decision-making processes.

The literature on *bureaucratic autonomy* emphasizes the importance of maintaining a degree of professional independence within administrative structures, particularly in specialized domains such as security and crisis management[3]. When operational decisions are perceived to be influenced by political considerations, this can lead to several negative consequences, including reduced efficiency, internal friction, and diminished public trust.

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[1] Brian McNair, *An Introduction to Political Communication*, Routledge, 2017, pp. 18-27

[2]Claire Wardle; Hossein Derakhshan, *Information Disorder*, Council of Europe, 2017 https://firstdraftnews.org/wp-content/uploads/2017/11/PREMS-162317-GBR-2018-Report-de%CC%81sinformation-1.pdf (21.04.2026)

[3] Daniel Carpenter, *The Forging of Bureaucratic Autonomy*, Princeton University Press, 2001, pp. 4-12

At the same time, it is important to acknowledge that crisis situations often require rapid decision-making under conditions of incomplete information. In such contexts, political leaders may feel compelled to intervene, either to ensure accountability or to respond to public pressure. The challenge lies in ensuring that such involvement does not undermine the expertise and procedural integrity of the institutions responsible for implementation.

Another relevant aspect concerns the *institutional resilience* of the state. Resilience, in this context, refers not only to the capacity to absorb and respond to shocks, but also to the ability to maintain coherence and legitimacy in the face of external and internal pressures[1]. The cases analyzed suggest that while Romania possesses certain operational capabilities, its institutional resilience may be affected by vulnerabilities in coordination, communication, and the management of political-institutional relations.

Furthermore, the interaction between political dynamics and information environments can create feedback loops that amplify tensions. Media narratives highlighting alleged irregularities or controversial decisions can increase public scrutiny, which in turn may lead to further political involvement. This cycle can complicate crisis management efforts and shift the focus from operational effectiveness to reputational considerations.

It is therefore essential to consider not only whether institutions are capable of acting, but also whether they are able to do so *independently*, *coherently*, and *consistently*, without undue external influence. This distinction is particularly relevant in the context of modern security challenges, where the credibility of state action is as important as its effectiveness.

Discussions

The findings of this study point to a nuanced and multifaceted assessment of the Romanian state's preparedness to manage exceptional repatriation situations. On the one hand, both cases demonstrate the existence of functional mechanisms capable of facilitating the extraction and return of citizens from high-risk environments. This suggests a baseline level of operational capacity, supported by diplomatic networks and institutional frameworks aligned with international practices.

On the other hand, the analysis reveals a series of structural and contextual challenges that may limit the effectiveness of these mechanisms. Broadly speaking, these challenges fall into three interconnected categories: coordination of operations, management of information, and the interaction between political and institutional actors.

From an operational perspective, while the execution of repatriation missions appears to have been ultimately successful, the processes leading up to these outcomes were marked by uncertainty and, in some instances, perceived inconsistencies. This underlines that possessing adequate capabilities is not sufficient in itself; their effective, timely, and transparent use is equally crucial.

The information dimension emerges as a particularly significant factor. In both cases, the absence of clear, consistent, and authoritative communication appears to have created space for alternative narratives to develop. These narratives, whether based on partial information or interpretative framing, have the potential to influence public perception and to undermine trust in state institutions. As such, *strategic communication* should be regarded as an integral component of crisis management, rather than a secondary consideration.

The political factor introduces an additional level of complexity to the situation. It should be emphasized that political oversight represents a legitimate and necessary

[1] Louise K. Comfort; Arjen Boin; Chris Demchak, *Designing Resilience*, University of Pittsburgh Press, 2010, pp. 1-9

component of democratic governance, and its presence in crisis situations does not inherently indicate inappropriate interference. The perception that political actors may influence operational decisions, even if not always substantiated, can have significant implications for institutional legitimacy. In democratic systems, maintaining a balance between accountability and professional autonomy is essential, particularly in sensitive areas such as security and emergency response.

Taken together, these findings suggest that preparedness cannot be understood solely in terms of technical or logistical capability. Rather, it must be conceptualized as a broader form of institutional readiness, encompassing coordination, communication, and governance. In this sense, the question is not only whether the state can act, but also how it acts, under what conditions, and with what degree of coherence and credibility.

Similar challenges have been observed in other European states, where crisis repatriation operations have also been affected by communication gaps, media pressure, and political scrutiny. This suggests that the Romanian case may reflect broader patterns within contemporary crisis management rather than an isolated national phenomenon.

Conclusions

This article set out to examine whether the Romanian state is prepared to manage exceptional situations involving the repatriation of its citizens from conflict-affected regions, and whether institutional actors can operate effectively in the presence of political and informational pressures. By analyzing two recent cases – the Democratic Republic of Congo and the Middle East – the study has identified both strengths and vulnerabilities within the current crisis response framework.

The findings indicate that Romania possesses a *functional operational capacity* for organizing repatriation missions, supported by diplomatic and institutional structures. This capacity enables the state to respond to external crises and to ensure, at least at a basic level, the protection of its citizens abroad.

However, the analysis also highlights significant challenges. The *management of information* during crises appears to be inconsistent, allowing for the emergence of narratives that may distort public understanding and affect institutional credibility. At the same time, *the interaction between political actors* and *administrative structures* introduces potential risks related to perceived or actual interference in operational processes.

These dynamics suggest that the effectiveness of crisis response is influenced not only by material resources and organizational structures, but also by less tangible factors such as trust, legitimacy, and coherence. In an environment characterized by hybrid threats and rapid information flows, these factors become increasingly important.

In response to the research question, it can be argued that the Romanian state is *partially prepared* for such situations. While the necessary mechanisms are in place, their performance is contingent upon the ability to manage political pressures and information dynamics in a manner that preserves institutional integrity.

Future efforts should therefore focus on strengthening *strategic communication*, enhancing *inter-institutional coordination*, and ensuring a clearer delineation between political oversight and operational decision-making. Such measures would contribute to a more resilient and credible crisis management framework, better suited to the challenges of the contemporary security environment.

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GEOSTRATEGIC INTERESTS OF THE RUSSIAN FEDERATION IN THE BALTIC AND BLACK SEAS

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Abstract

In the context of the new Russian imperialism, a phenomenon that Europe has been facing since 2014 when the power from the Kremlin occupied the Crimean Peninsula, we consider it necessary to re-evaluate the geopolitical and geostrategic situation in Eastern Europe, in the two areas of contact, namely the Baltic coast and the Pontic one.

In the north of the continent, the Kaliningrad exclave has a special strategic importance for Russia, as an outpost of its commercial and military interests, supported by the Russia-Belarus relationship and Saint Petersburg, the legacy of Tsar Peter.

The main strategic objectives of Russia in the Pontic area are, just like in the last three centuries since Catherine the Great conquered the northern shore of the Black Sea, the straits that give Moscow access to the Mediterranean Sea and later in the Atlantic Ocean. It is primarily about the Kerch Strait, which Russia fully controls, along with the Azov Sea since 2014 when Russia recaptured Crimea by force and especially about the Bosphorus and Dardanelle.

Keywords: Russia; ideology; geostrategy; Kaliningrad; Baltic Sea; Black Sea

Introduction

As hard as it may be to believe, Russia's security policy and implicitly its constant aggressiveness towards its neighbors stems to a certain extent from the vulnerabilities of its territory, the largest of the territories of any state entity on the globe; the larger, the more difficult it is to defend. In this regard, if we were to consider only the points of contact of the territory of the Russian Federation with Europe, two fundamental aspects would draw attention: the Northern European plain and the Black Sea area with its straits and the related hydrographic network.

However, to blame the aggressiveness of post-communist Russia, essentially the Putin regime, solely on geographical and geostrategic vulnerabilities is obviously a mistake. The seeds of this aggressiveness must be sought on the one hand in the causes that led to the fall of the Soviet Union, on the other hand in the ideological support that Putin's Kremlin sought and found, in order to preserve the influence of post-communist Russia threatened with dissolution and subsequently to recover the influence of the Soviet Union, including at the territorial and geostrategic level, as seen in Georgia and currently in Ukraine. Finally, Putin's goal is to make revenge on the West for the defeat suffered in the Cold War.

Neo-Eurasianism. The Ideological Support of the New Muscovite Imperialism

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The end of the USSR has, in the view of the Russian historian Vladislav Zubok[1], five main causes: the economic and military superiority of the US and its policies during the Cold War; glasnost, the reformist policy of transparency of Soviet President Mikhail Gorbachev who "discredited the communist ideology, but also condemned the Soviet system to failure"[2], the implosion of the USSR economy; national independence movements in most of the constituent republics of the union, among which Ukraine played a crucial role; opposition to Gorbachev's reforms manifested by the most powerful Soviet elites and the military-industrial complex. Vladimir Putin's strategy and the actions he takes come precisely to correct these causes pointed out by Zubok and to anticipate and counteract the centrifugal tendencies within the Russian Federation. Putin also avoids the mistakes that, in his opinion and that of the power environment that promoted him, Boris Yeltsin's democrats made in the 90s, during the failure of democracy in the Kremlin.

For all this to happen, an ideology was needed. The Russian writer and thinker, Alexander Solzhenitsyn identified the issue of the borders of the Russian Federation as the "new Russian question". He promoted the idea of separating the East Slavic republics from the ex-Soviet non-Slavic republics and the formation of a Russian Union consisting of Russia, Ukraine, Belarus and northern Kazakhstan. The new leaders in Moscow, initially located around Boris Yeltsin, then alongside Vladimir Putin, sought to distance themselves from Soviet mentalities and faced opposition from the former communists. At the same time, they needed to maintain control over the entire ex-Soviet territory, including the non-Soviet population. As such, they were looking for a new variant of the idea of Russia.

In the 1990^{s}, several ideological currents emerged, of which the so-called Eurasianism gathered more followers after Putin came to power in 2000. It had been initiated even before the Bolshevik Revolution. Prince Nikolai Trubetskoi and Pyotr Savitsky, intellectuals who were later exiled by the communists, laid the foundations of Eurasianism that promoted the resettlement of the old Russian imperial space along the lines of Russian culture, Orthodox Christianity and the entire imperial heritage that included the non-Slavic populations. Among the current theorists of neo-Eurasianism is Alexander Dugin, who advocated the creation of a Eurasian empire and was at one time even considered a promoter and ideologue of Russian fascism.

Vladimir Putin was also strongly influenced by the memoirs of Lieutenant General Anton Ivanovich Denikin, one of the White Army officers who promoted, at the beginning of the last century and then in exile, Eurasianism and the supremacy of the great Russian tripartite people made up of the Great Russians, the Little Russians (the Ukrainians) and the White Russians (the Belarusians). At the same time, the Kremlin leader has repeatedly expressed his appreciation for the philosopher and writer Ivan Alexandrovich Ilyin, known as an admirer of fascism, who argued that Russia will have to unite all its territories ruled throughout history.

Accumulating all these pseudo-scientific and pseudo-philosophical influences of characters from different eras and conjunctures, in July 2021, just a few months before the invasion of Ukraine, Vladimir Putin himself published a long essay entitled "On the Historical Unity of Russians and Ukrainians" in which he tried to actually ideologically argue his aggressive intention to justify his planned invasion.

[1] Vladislav Zubok, *Căderea: colapsul Uniunii Sovietice*, Litera, București, 2024, p. 29
[2] *Idem*

Russia's Similar Strategies for the Baltic and Black Seas

Stretching from the south and west of France to the Ural Mountains, the plain of northern Europe runs through France, Belgium, the Netherlands, Germany, Poland - where it is only 500 kilometers wide - and then suddenly widens, both towards the Baltic countries and the Finnic Gulf to the north, and to the south, in addition to Podolia and the Carpathians, to the Crimea and the Caucasus. It is easy to imagine how difficult it is to defend such a large flat surface. For the past four centuries, Moscow has been attacked across this plain by Poland in 1605, by Charles XII's Sweden in 1708, by Napoleonic France in 1812, by Kaiser Wilhelm II in 1914, and by Hitler on June 22, 1941, when he launched Operation Barbarossa. The great luck of the Kremlin and at the same time the reverse of the mentioned geopolitical situation is represented by the fact that, as difficult as it is to defend, it is also difficult for the attackers to maintain the supply lines on such a vast territory, as Tim Marshall observes [1]. This was also confirmed in the case of Napoleon and Hitler. In addition, Russia's ally was General Winter in both cases.

In order to control this vast plain and at the same time this vulnerability, Russia's security policy envisages three aspects: the alliance with Belarus[2], the access it represents to the Finnic Gulf and the Baltic Sea, the port of St. Petersburg[3] and especially the Kaliningrad enclave, the Kremlin's outpost on the Baltic Sea and in the northern European plain, located between Poland and the Baltic countries separated by a border with a length of about 60 km, the Suwalki Corridor [4]. Although the Baltic countries[5] first declared their independence from Moscow in 1991, in the context of the implosion of the former USSR, they are still in the way of the Kremlin's interests. Nor does the subsequent accession to NATO and the EU seem to considerably diminish the risks and vulnerabilities of the situation in which these three countries find themselves, as they turn into vulnerabilities of NATO and the EU respectively to Russian policy.

The essential criteria of Russia's policy towards the Baltic countries are reviewed by the publication GeoPolitica[6], first the demographic criterion being considered. The Russian minorities in the three Baltic states are substantial in relation to the entire population, and the population of Russian ethnicity or Russian speaking[7] is predominantly concentrated near the border of the Russian Federation.

Lithuanian researcher Agnia Grigas[8] analyzes in detail Vladimir Putin's policy by which ethnic Russians in former communist countries, estimated to be about 25-30 million, along with Russian speakers but also Russophiles, constitute themselves through the policies promoted by the Kremlin, a major pretext for the new Russian imperialism. The Lithuanian author demonstrates that there are a close link and an undeniable continuity between Putin's neo-imperialism and the classic imperialism of the Romanovs or the Soviets. In this regard, it establishes a whole series of ideological, cultural, geopolitical and security factors. The tsars carried out in the conquered territories, with the intention of obtaining exits to the sea, a

[1] Tim Marshall, *Prizonierii geografiei*, Litera, București, 2020, pp. 26-27
[2] A fact confirmed by the consistency with which President Lukashenko suppresses any attempt at an uprising by the Minsk opposition led by Sviatlana Tsikhanouskaya and the other democratic leaders
[3] The strategic edifice of Peter the Great for which Russia has taken most of Karelia from Finland
[4] Considered by NATO experts as the main access route for Russian troops in the event of an invasion that would isolate the Baltic countries from the rest of NATO territory
[5] Estonia, Latvia, Lithuania
[6] Alex Berca, *Strategii militare ruseşti în zona Balticii şi a Mării Negre cu efecte asupra insecurităţii mondiale*, "GeoPolitica", No. 4, 2022, pp. 79-92
[7] Byelorussians, Ukrainians and Polish
[8] Agnia Grigas, *Crimeea şi Noul Imperiu Rus*, Corint, București, 2022, pp. 21-23

policy of Russification by imposing the Russian language and the Cyrillic alphabet to the detriment of the native languages. They did not shy away from ethnic cleansing, the displacement and deportation of ethnic populations and groups, and the colonization of the territories thus obtained with ethnic Russians. Thus, multiethnic populations were formed. The Soviets pursued the same policies, while perfecting the means of reducing the native population in all Soviet socialist republics. The result of these policies was that, after the collapse of the union, the borders of the former Soviet republics no longer overlapped with the ethnic reality and thus the tsarist-Soviet legacy proved to be the bearer of the seeds of the re-imperialization of the Kremlin's policy.

Another criterion of Russian policy towards the Baltic countries that Geopolitical presents is the economic one. It manifests itself through multiple interests of the Kremlin, from the energy needs of the Baltics, poor in such resources, to the Baltic ports that do not freeze all year round, representing a gateway for trade with the West that Moscow lost with the declaration of independence of the Baltics. The second major geostrategic disadvantage of Russia is the lack of hot water ports, which do not freeze at all during the year and ensure permanent access and free trade, either through the Baltic Sea to the northern waters or through the Black Sea to the Mediterranean and the Atlantic Ocean. In their absence, Russia is isolated on the continent. Hence the importance that the Russians attach to the port of Kaliningrad, but also to the Black Sea with the mouths of its great tributaries - Dnieper, Bug, Dniester, Danube - and especially with the straits through which it communicates, both with the Sea of Azov (Kerch Strait) and especially with the Sea of Marmara and the Aegean Sea (Bosphorus and Dardanelles Straits).

Analyst Alex Berca points out in GeoPolitica magazine that, although the two areas, Baltic and Pontic, differ structurally, they seem to be part of the same strategy of Moscow aimed at transforming the security order of the entire Europe and even the entire world. The conquest of the north-Pontic steppe by Russia began during the time of Tsar Peter the Great who annexed to Moscow, in 1725, the territory between Kiev, Kharkiv, Poltava and Yekaterinoslav, 15 years later the Russians advanced towards Kherson.

The next important moment was the Russo-Turkish War between 1768 and 1774, which ended with the Peace of Kuchuk-Kainardji (1774). Russia then obtained Kherson, at the mouth of the Dnieper into the Black Sea and the Azov with the entire eastern shore of the Sea of Azov; nine years later also joining its western shore, from Taganrog to Kerch and Perekop, including the Crimean Peninsula[1].

A new Russian Turkish armed conflict followed, concluded by the Peace of Iași (1792), because of which the Tsarist Empire crossed the Dnieper and conquered the Ochakov, at the mouth of the Bug. Tsarina Ekaterina the Great then built Odessa in 1795, just a few tens of kilometers from Ochakov, on the left bank of the Dniester, on the hearth of the Turkish settlement of Hadjibei [2]. This was after two years before, Ekaterina had participated, together with her two co-nationals, the sovereigns of Austria and Prussia, in the second partition of Poland (1793) and had obtained the territory north of Ochakov, from the upstream pond on the left bank of the Dniester to Ternopol and the heart of Podolia.

The tsarist ascent on the Black Sea shore will end at the mouth of the Danube with the annexation of Bessarabia by Alexander I, following the Russian Turkish conflict of 1806-1812, concluded by the Peace of Bucharest (1812). Some historians believe that only to

[1] Alexandru Dimitrie Xenopol, *Războaiele dintre ruși și turci și înrâurirea lor asupra Țărilor Române*, Albatros, București, 1997, p. 51

[2] Vadim Bacinschi, *Românii la Odesa*, Axis Libri, Galați, 2014, pp. 8-10

Napoleon's invasion of Moscow in the same year we owe the fact that the two Danube Principalities were not then fully incorporated into the Russian Empire, whose goal was to conquer Istanbul and take control of the Bosphorus Straits and the Dardanelles.

In the following lines, we propose brief research of the two mentioned aspects, with major implications on the foreign policy of the Russian Federation and inevitably on the security climate in Eastern Europe. We will therefore go through some stages of the history of Kaliningrad and the history of the evolution of the navigation regime on the Black Sea, but we will also try to define as accurately as possible the current state of these geopolitical and geoeconomic issues.

Kaliningrad. An Enclave of Contrasts

A Brief History of the Fortress of Konigsberg[1]

The Teutonic Knights, to Christianize the Baltic and Prussian tribes living between the Vistula and the Neva, occupied the region of present-day northern Poland in the thirteenth century, after being removed by the Hungarian crown from the Land of Barsa, where their power had grown worryingly. They had also been brought by the Hungarian crown as early as 1211, to defend Transylvania from the invasions of the Pechenegs and Cumans. Here, on the Baltic Sea, the Teutons built the fortress of Konigsberg [2] in 1255. In fact, along the two rivers, they built a whole series of forts that later gradually became cities. From here they launched violent campaigns of conversion to Christianity through repression. This is also where the offensive actions against the Slavs started. In about half a century they took control of the entire region of Prussia, building imposing and solid castles to defend the new possessions. The capital of the Teutonic Order became Königsberg[3].

The state thus created became prosperous through trade, as a member of the Hanseatic League[4]. The Teutons traded mainly grain and additionally offered protection to the Hanseatic states. After 1300, they thus became a fearsome military and economic power throughout Central-Eastern Europe, controlling most of Latvia and Lithuania, along with Prussia and parts of present-day Germany. Gradually, the old Prussian population merged with the Germanic one, settled in the region starting with the 14th century, thus giving rise to the Prussian-German identity that is the basis of today's Germany. From a cultural point of view, at the beginning of the fourteenth century, Königsberg, the capital of the Teutonic Order, became a pole of irradiation of the Religious Reformation and humanist ideas, thanks to the newly created university here.

In 1618, the Hohenzollern dynasty that ruled over Brandenburg (in today's northern Germany) also inherited Prussia, which would soon become a European power. Konigsberg would remain for a time the capital of the entire Principality of Prussia, and the latter would become a kingdom in 1701, when the Roman German Emperor, Leopold I, offered the Duke of Hohenzollern the royal crown[5]. From 1772, Königsberg became the administrative center of the province of East Prussia within the Kingdom of Prussia.

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[1] Stan Petrescu, *Călătorii geopolitice-Lumea văzută de la București*, Editura Militară, București, 2010, pp.74-76
[2] Today's Kaliningrad
[3] In translation from German, The King's Peak
[4] An alliance of medieval trade guilds that established a monopoly over the entire Baltic Sea and a substantial part of Northern Europe for over four centuries (thirteenth century - seventeenth century)
[5] The coronation took place in Königsberg, and the duke became King Friedrich I, succeeded to the throne after his death in 1713 by his son Friedrich-Wilhelm

At the beginning of the nineteenth century, after the disappearance in 1806 of the Holy Roman Empire of the German Nation[1], the city of Konigsberg is the one that gives the signal for the liberation of Germany from the domination of the French armies led by Napoleon. This will be completed by the victory of Leipzig in 1813.

Subsequently, in 1871, after another historic victory in the Franco-German War of 1870, the Second Reich, the second German empire, led by the German Emperor, Kaiser Wilhelm I of Hohenzollern, and Chancellor Otto von Bismarck, the architect of Greater Germany, was born, also on the Prussian initiative. The united Germany would encompass the North German Confederation, dominated by Prussia, along with Bavaria, Franconia, Swabia and many other German states except Austria[2].

The Twentieth Century - from Königsberg to Kaliningrad

Triggered and defeated in World War I, Germany will be divided by the reconstruction of Poland. East Prussia will be separated from the rest of the country by the Danzig corridor[3]. This would also be the pretext for Hitler to start World War II, at the end of which East Prussia would disappear for good[4]. Initially, there was talk of joining this territory to Lithuania, which was, at that time, a union republic within the USSR. In 1946, however, the creation of a separate region within the USSR was established and it was also then that the population of the area with ethnic Russians began. The name of Konigsberg was changed to Kaliningrad[5] in memory of Mikhail Kalinin, chairman of the Presidium of the Supreme Soviet until 1946 and close to Stalin. At the same time, ethnic Germans were expatriated to Germany, in successive waves, until 1948.

The revolutionary year 1989, the dismemberment of the USSR (1991), the withdrawal of the Soviet armies from Central-Eastern Europe and the process of redefining international relations, outlined another Eastern European geopolitical map. For Kremlin leaders, but especially for Russian military leaders, the entry of Poland and the Baltic countries into NATO have increased the strategic importance of Kaliningrad. The exclave was seen as a real frontline of the Russian Federation in front of NATO and as a pressure factor on the neighboring states[6]. Currently, Russia has become, especially after Ukraine's exit from its sphere of influence, from a global power, a regional one, with great nuclear potential. This ebb again affects the population of Kaliningrad, a region where the domination of the defunct USSR had brought major changes to the landscape.

Geographically speaking, the Kaliningrad enclave is closer to Europe than to Russia, but given the administrative belonging to the Russian Federation, the neighborhood with the West is not an advantage, as in the case of the other countries around, but deepens the degree of enclave. An attempt was made to rebuild the city, but it became even poorer. The Baltic countries especially, becoming independent and practicing a market economy, have pushed Kaliningrad towards isolation, even more so as it is completely dependent on Russia for energy[7]. Residents now need a visa to cross Lithuania and Latvia. The Russian Federation, to avoid such restrictions on the transport of goods and people, chose a bypass route, by sea,

[1] Formally ruled by the Emperor of Austria and originated through the splitting of the Frankish Empire, in 843

[2] The former dominant province within the First Reich, at that time in the Austro-Hungarian dualism (1867-1918) until the dissolution, after World War I, of the Viennese empire ruled by the House of Habsburg.

[3] Gdansk, in Polish

[4] By the Allied agreements of Yalta (1944) and Potsdam (1945), it would be placed under Soviet and Polish administration, with the city of Konigsberg and the northern part of East Prussia being assigned, on August 2, 1945, to the Soviet Union.

[5] in Russian, City of Kalinin

[6] Janusz Bugajski, *Pacea Rece. Noul imperialism al Rusiei*, Casa Radio, București, 2005, pp.106-107

[7] *Idem*

using the ferry fleet. Land transit from Russia through Lithuania has generated a series of tensions between the two states in recent years, culminating in the decision of the authorities in Vilnius to close the railway route under the pretext of repairs. With the Russian invasion of Ukraine, relations between the Baltics and Russia have cooled even more.

Baltic Hong Kong, a Geostrategic Objective in the 21st Century[1]

Russia's only European port that does not freeze in winter, except for the Black Sea ports, Kaliningrad has remained a strategic outpost of utmost importance for the Kremlin power. The city has around a million inhabitants, 78% of whom are of Russian origin. This represents about half of the total population of the enclave. As an ethnicity, since the region has retained its strongly militarized character, almost all nationalities of the former USSR are present here. The region belongs to the Northeast District, one of the seven super regions created by Putin through the administrative-territorial division in 2000, the year he took power from Boris Yeltsin. During the Soviet period, the Kaliningrad region had also been of utmost geostrategic importance as the Baltic Sea was the interface between NATO and the Warsaw Pact. The port of Baltiisk was the headquarters of the Baltic Fleet, which was relocated after 1991 to St. Petersburg. In Kaliningrad remained a tenth of the military personnel stationed during the former USSR[2].

Currently, however, it is not only Moscow that is interested in the Kaliningrad enclave. It has captured the attention of another important capital of the world, that of the European Union, Brussels. If until the dismemberment of the USSR the enclave was a *terra incognita* for Europeans, as well as for Soviet citizens, since, due to its super militarized character, it was a closed territory, secreted by the Kremlin, after 1991 and especially after May 1, 2004, when the EU enlargement with Poland and the Baltic countries took place, the European superstructure found itself with an intruder inside its territory. The borders between Poland and the enclave, respectively between Lithuania and the enclave, become external borders of the union, although in geographical position, to Moscow they are more than 1200 km, while to Berlin or Copenhagen less than 600 km. After numerous delays, the Russian government signed in Brussels, according to the rules applied in the Schengen area, an agreement on the facilitation of crossing, a free visa or at a minimum price, valid for multiple entries, which allows the passage of the inhabitants of Kaliningrad to Russia.

The Western press once called Kaliningrad, the Baltic Hong Kong. Since the 1990s, the local authorities have hoped to capitalize on the peculiarities of the city's geographical position. The region has three ports[3], a special tourist potential in the coastal area, including the UNESCO World Heritage Coral Cordon and two maritime fishing fleets. Since 2003 it has been exploiting Caspian oil, contributing to the regional budget, has a wood and paper industry and an electronics industry (TV and refrigerator factory). First, however, the city is located on the world's largest amber reserve[4].

At the same time, EU enlargement has opened several opportunities for Kalinngrad through the emergence of numerous economic and political partners: Germany, Poland, Lithuania, Denmark, Sweden and even the EU. After several years of waiting, a German consulate opened its doors in the old Königsberg in February 2004. BMW[5] has also created a bridgehead here, installing an assembly line for cars destined for the Russian market. Along with the enclave's neighbors, Poland and Lithuania, Germany has become its main investor

[1] Stan Petrescu, *Op. cit,* pp. 77-80
[2] *Idem*
[3] Kaliningrad, Svetly and Baltiisk
[4] 90% of the world's amber reserve
[5] Bayerische Motoren Werke AG

and partner. The German state favors the cooperation policies of the closest states of Brandenburg and Schleswig-Holstein to the enclave.

Thus, since the end of the Cold War, the Kaliningrad region has nevertheless developed economically and implicitly increased in strategic importance. According to some calculations, the living standards of the Kaliningrad people even reached 95% of that of Lithuanians and 75% of that of Poles. To maintain this development, the Russian Federation will have to provide the enclave with greater economic and institutional autonomy. The question is to what extent is Moscow willing to grant autonomy, without fear that this could generate separatist tendencies or favor pre-existing separatist ambitions? Also, the development of the enclave in relation to the rest of Russia could call into question the Kremlin's economic policies in its own country.

On the other hand, because of the economic asymmetries between the Kaliningrad region and its neighbors or the other Baltic countries, there are certain concerns within the EU about the emergence and development of drug and arms trafficking or prostitution.

The Status and Geostrategic and Commercial Importance of the Bosphorus and Dardanelles Straits from the Nineteenth Century to the Present Day

Throughout the known history of mankind, the Black Sea has been at the interference of several civilizations, thus being an area of contact and trade. As early as the seventh century BC, the Greek colonies established along its coasts developed trade on the Black Sea, facilitating relations between the populations of the Middle East, Central Asia and Europe. Subsequently, the Roman Empire gave special importance to the Black Sea basin and Byzantium, the medieval heir of ancient Rome, dominated the Black Sea basin for almost a millennium.

The Conquest of Constantinople by the Ottomans (1453) and later the entry of the north-Pontic coast under the rule of Tsarina Catherine, through the efforts of his favorite admiral, Potemkin, at the end of the eighteenth century, would trigger a series of Russian-Turkish wars that jeopardized trade relations on the east-west axis and isolated the Black Sea on the world map. Only the Crimean War (1853-1856), in which France and the British Empire allied with the Ottoman Empire and stopped the expansion of Tsarist Russia towards Istanbul, would reaffirm Western Europeans' interest in the Pontic area and access control through the Bosphorus and Dardanelles straits.

After 1870, the unification of Germany and the expansion of the Central Powers would introduce a new geopolitical actor into the Black Sea equation. Both the Kaiser in World War I[1] and the Fuhrer [2] in the Second placed great importance on the straits. During all this time, therefore, the main strategic area of the Black Sea was constituted by the Bosphorus and Dardanelles straits, as they allowed/stopped the access of the belligerent powers to/from the Pontic area. How access through the straits has evolved in the last two centuries, from the Turkish monopoly to the Montreaux Convention (1936), which were the international treaties that marked the stages of establishing the current conditions of transit through the straits, we intend to follow in the present analysis.

[1] The Battle of Gallipoli
[2] Hitler fought for a year with the Red Army for supremacy on the Black Sea

Navigation in the Black Sea, Allowed Only to the Ottoman, Tsarist and Habsburg Empires

Mustafa II[1] declared in 1703, in a letter that would be sent after his abdication by his brother, Ahmed III, who had become a padishah, that he would maintain total authority over navigation in the Black Sea and would not allow any vessel access to the Pontic area[2]. Ahmed III would therefore continue the restrictive policy on navigation in the sea basin that the Turks called Kara Deniz. Charles de Peyssonel[3] nevertheless recorded an attempt to open the straits and the Black Sea basin shortly after the middle of the eighteenth century, when the inhabitants of the fortress of Raguza[4] tried to intervene with Ali Pasha Hussein Oglu, the governor of Trebizond[5], through his doctor, of Raguza origin, to obtain certain navigation facilities. However, the approach was thwarted by the major Western powers through their ambassadors in Istanbul.

The first to open the lock of the straits will be the Russians, in the time of Catherine II, because of the Russian Turkish war between 1768-1774 and the Treaty of Kuchuk Kainardji that would end this war. Article 11[6] of that treaty provided for free access for Russian merchant ships to the Black Sea and the Sea of Marmara, through the straits, as well as to the Danube and to all ports and shipyards. The Turks also allowed the Russians to carry out commercial activities in all the provinces of the Ottoman Empire, with the same facilities and under the same conditions that they offered to the English and French.

After the signing of the Peace of 1774, it seems that there had been certain problems in complying with its provisions regarding navigation, so that further diplomatic negotiations and the signing of a new agreement were necessary. It is Aynalikavak Tenkihnamesi [7]. It will include 9 articles, the most important of which for navigation, navigation from which the port of Sulina also subsisted, was Article 6, and for the history of the future Romanian nation, was Article 7, which regulated navigation and access of the Russians to the mouths of the Danube.

The Explanatory Convention of Ainali Kavak will be followed by the Convention on Trade and Navigation with Russia[8]. The Austrians will also enjoy the same freedom of trade and navigation in the Black Sea and Danube basin, starting only with the signing of the Sened of August 6, 1783, on the insurance of Austrian ships against barbarian corsairs, in fact Berbers. This will be followed by the most important treaty, namely the Senate of Trade and Free Navigation of February 24, 1784, the Muslim year 1198. The treaty convention was not as thick and precise as the one concluded with the Russians, comprising only 8 articles. The phenomenon of opening navigation on the Black Sea had therefore begun in two stages, once in 1774, the second time in 10 years, in 1784, the beneficiaries being first Russia, then Austria. Among these, the French would also infiltrate, using the Russian flag, a flag that the tsars offered to anyone in the absence of their own trade fleet in Ciornoie More. The fact is presented, among others, by a famous French shipowner, namely Anthoine Baron de Saint Joseph.

[1] Sultan of the Ottoman Empire from 1695 to 1703 (6 February 1664 – 29/30 December 1703)
[2] Tudose Tatu, *Afurisita strâmtoare de Sulina (1741-1786*), Axis Libri, Galați, 2020, p.5
[3] The French consul in the Crimean Khanate
[4] Today's Dubrovnik in Croatia
[5] The former Trapezunt, today the Turkish city of Trabzon
[6] Tudose Tatu, *Op. cit*, pp.197-198
[7] Explanatory Convention of the Treaty of Kuciuk Kainardji, concluded at Ainali Kavak on March 10/21, 1779, Muslim year 1193
[8] Signed in Constantinople on 10/24 June 1783 / 21 Redjeb 1197

Following these treaties signed with the Ottoman Porte by the Russians and Austrians, a series of trade agreements became necessary and were concluded by Russia with: Austria, in 1784, the one signed in 1785 by Russia with France, and on January 21, 1787, the Treaty of Commerce between Her Majesty the Empress of All Russians and Her Majesty the King of the Two Sicilies[1].

The Western Powers, France and Great Britain, Gain Access to the Black Sea

By signing the Treaty of Commerce and Navigation on June 25, 1802, the French merchant fleet will be allowed access to the Pontic basin, and France will have entered into force a new commercial treaty with the High Porte, signed in 1830, after the Peace Treaty of Adrianople (1829) which ended a new Russo-Turkish war[2]. England, on July 29, 1802, also obtained, through the notification of the Turkish Foreign Minister, Reis Effendi Raif Mahmud Pasha, the privilege for English merchant ships to sail in the Black Sea with access to the Danube ports as well[3]. This notification is reinforced by the Hati Sherif of Sultan Selim III[4], which allows an unhindered commercial activity in the Black Sea and on the Lower Danube, according to the norms of the old capitulations concluded with the Porte[5].

A new trade and navigation treaty was also concluded between the Ottoman Empire and England after Adrianople in 1838. The Russo-Turkish War of 1806-1812 will bring the closure of the straits during the period of hostilities. They will be reopened after the conclusion of the peace in Bucharest, until the outbreak of another conflict, that of 1828-1829. The provisions of the Adrianople Peace Treaty of September 14, 1829, among other things, will include that the subjects of the Russian Empire will have full freedom of trade within the possessions of the Ottoman Empire, by land and sea, the passage through the straits being open and free to all Russian goods (Articles 7 and 9), together with the damages due by the Porte as war reparations, amnesties on both sides (art. 13), the return of prisoners of war (14), etc. The treaty was to be ratified within 6 weeks of signing.[6]

The advantages obtained by the Russian Empire through the Treaty of Adrianople were summarized particularly suggestively by Karl Nesselrode (1780-1862)[7] in the letter sent to Grand Duke Constantine, on February 12, 1830. He presented the Adrianople agreement as an extraordinary success of Russian diplomacy that made Turkey dependent on Russia, to the detriment of the Western Powers and especially of the British Empire.

After long Russian Turkish negotiations, which resulted in the conclusion of a system of alliances between the two regional powers, the right of free movement through the straits extends to the Russian military fleet. The Treaty of Unkiar Iskellessi (1833) [8] thus increased Russia's enormous prestige in the Near East. But the Russian influence in Constantinople was rightfully annihilated by the others and especially by the English, as proof that the sultan no longer wanted to renew the treaty in 1841.

[1] concluded at Tarskoe Selo on 6/17 January 1787
[2] Tudose Tatu, *Dunărea veche, margine tulbure - Sulina au Sunne (1812-1817),* Farul, Constanța, 2023, pp.47-48
[3] *idem*
[4] Royal act dated 15 zilhidje 1217 Muslim year, corresponding to 8 April 1803
[5] customs duties of 3%, judging commercial disputes by joint commissions, etc
[6] Tudose Tatu, *Dunărea veche, margine tulbure - Sulina au Sunne (1812-1817),* Farul, Constanța, 2023, p.49
[7] Minister of Foreign Affairs of the Tsarist Empire between 1816 and 1856 and also a fervent defender of the conservative precepts of the Holy Alliance
[8] Tudose Tatu, *Dunărea veche, margine tulbure - Sulina au Sunne (1812-1817),* Farul, Constanța, 2023, p.48

The Treaties of London (1841, 1871) and the Crimean War (1853–1856)[1]. Western Offensive Against Russia

However, these new Russian Turkish alliances were intensely contested by the great Western powers of the time, England, France and Austria, who sought to limit Russia's rights arising from its position as a country bordering the Black Sea. Consequently, a convention is concluded by which in time of peace, if Turkey is not engaged in any armed conflict, it should not allow military ships to pass through the straits, regardless of the flags under which they sailed (London, 1841).

The merchant ships of all countries, however, had this permission. The Black Sea thus becomes, through the Treaty of London, a demilitarized zone, thus blocking the Russian military fleet. The Sultan, closing the straits to military vessels, struck primarily at the Russian fleet, which remained sequestered in the Black Sea. But, in the event of war, he could open the straits to the military fleets of friendly states, just as he allowed England, France and Sardinia, in 1853-1855, to enter the Black Sea, to start the Crimean War[2].

In conclusion, through the London Convention of 1841 on the regime of the straits, tsarist diplomacy suffered a failure, a situation consecrated and reinforced by the Treaty of Paris (1856) which ended the Crimean War.

Moreover, the powers present[3] at the Paris Peace Congress[4] undertook to "respect the independence and territorial integrity of the Ottoman Empire", considering that any act likely to bring the slightest damage to it is "a matter of general interest" (art. 7). The integrity of the Ottoman Empire meant that Russia's hands were tied and could do virtually nothing as it came into conflict with the major European powers as a bloc. It also meant putting the brakes on the struggle for the total emancipation of the peoples of South-Eastern Europe.

In this context, the Black Sea was declared neutral, open to the merchant navy of all nations, and the waters and ports were forbidden to warships of any power, even of the riparian powers (art. 11). Trade in the ports and waters of the Black Sea was free from any hindrance, from any restriction, and for the purpose of securing the commercial and maritime interests of all nations, Russia and Turkey will admit consuls to their ports, in accordance with the principles of international law (art. 12). In addition, the Black Sea being declared neutral, both Russia and the Ottoman Empire were not allowed to have fortifications or naval arsenals (art. 13).

As if these were not enough, in 1871 a new conference was held in London by which the right of free movement through the straits was extended to the military ships of the Western Allied powers, to the detriment of those of Russia. These principles were again enshrined and strengthened by the Treaty of Berlin (1878)[5] which also recognized the independence of the Romanian Principalities and the exchange of the three Danube counties[6] with Dobrogea, at the request of Russia.

[1] Charles King, *Marea Neagră, o istorie*, Brumar, Timișoara, 2005, pp. 264-270
[2] *Idem*
[3] France, England, Prussia, Sardinia, Austria, Russia
[4] Charles King, *Op. cit,* pp. 264-270
[5] *Ibidem*, pp. 302-305
[6] Ismail, Cahul and Bolgrad

World War I. The Treaty of Sevres (1920) and the Lausanne Convention (1923)[1]

During the First World War, a new geopolitical actor - Germany - made its presence felt in the straits area, which thus became the scene of heavy battles between the Franco-British military forces and those of Turkey, Germany's ally. Turkey is defeated and the straits pass under the military occupation of the Entente because of the Armistice Convention signed by Turkey in 1918. By removing the discriminatory nature of previous treaties and conventions, the legal regime of the Ponto-Mediterranean straits enters a new phase of its evolution, that of guaranteeing full freedom of navigation for ships of all countries, both commercial and military.

Two regulations drew attention in this regard after the end of the World War: The Treaty of Sèvres (1920) and the Treaty of Lausanne (1923), around which fierce disputes were fought. The Treaty of Sèvres, not recognized by Turkey, provided for the demilitarization of the area of the straits by destroying all the fortifications on their shores previously erected and ensuring complete freedom of navigation, both for commercial purposes and for military vessels, without charging any tax. Basically, the Bosphorus, the Dardanelles and the coast of the Sea of Marmara were made available to the League of Nations, but also to the forces of the Entente that won the First World War.

After Kemal Ataturk's Revolution and the defeat of Greece and Armenia[2], republican Turkey signed the Lausanne Convention with the Western powers, a document advantageous for both sides. The Convention strengthened the provisions of the Treaty of Sevres only in the commercial and civil spheres, proclaiming the internationalization of the Bosphorus and Dardanelles straits under the patronage of the League of Nations. This provision was imposed because of the internationalization of European rivers, including the Danube. At the same time, certain sanitary and safety rules were established for traffic through the straits, especially in times of war, and Turkey's total independence was recognized.

Montreux Convention (1936). Ccurrent State of the International Law on the Status of the Straits and the Black Sea

The Montreux Convention, Switzerland, takes up the principles of free passage and navigation, but gives Turkey the right to block the traffic through the straits to the ships of another state, if it felt threatened by it with any armed conflict. If Turkey is not a belligerent party, commercial vessels have total freedom of traffic. In addition to these, the Convention also regulated a few technical problems concerning traffic and navigation procedures. The Montreux Convention, which is still in force today, stipulates, more clearly than in previous agreements, the rights of riparian and non-riparian countries in the use of straits, with the consent of their international regime.

The Montreux Convention on the Status of the Straits is an agreement from June 22 to July 21, 1936 by which Turkey effectively regains control of the Bosphorus and Dardanelles straits. The negotiations took place with the participation of the states: Turkey, the USSR, Great Britain, France, Bulgaria, Romania, Greece, Yugoslavia, Australia and Japan. Despite efforts initiated in 1982 to legalese the issue of straits globally, in a broader context of continental shelves and exclusive economic zones, the United Nations Montego Bay

[1] Henry Morgenthau, *Ambassador Morgenthau's Story*, Wayne State University, Detroit, 2003, p. 303

[2] Greece and Armenia were supported by the Entente in their attempt to conquer Turkish territories in Asia Minor which they claimed on historical grounds.

Convention on the Law of the Sea (UNCLOS)[1] to which most of the world's states subsequently acceded, does not change the legal regime of the straits for which previous agreements were signed. This is therefore also the case with the Black Sea Straits, which therefore remain under the Montreux Convention.

Conclusions

Access to the Black Sea is vital for all coastal or neighboring states, as it is a strategic crossroads between continents and cultures. From an economic perspective, the Pontic area is a corridor of utmost importance for the trade and transport of various goods between Europe, Asia and Africa, including an energy corridor.

For Russia, the Black Sea is a pivot through which it can project its power either in the Middle East or in southern Europe, along the Mediterranean. The Russian Black Sea Fleet is considered an important operational-strategic resource in this regard.

The strategic points of the Black Sea are the Turkish straits, the Bosphorus and the Dardanelles, but also the Strait of Azov, also known in history as the Cimmerian Bosphorus, which is the subject of the Russian Ukrainian competition for the north-Pontic coastline, along with Crimea.

With control of the Bosphorus and Dardanelles straits, as well as the largest littoral area of the Black Sea, Turkey asserts itself as an important regional player, a hub of regional geopolitics and geostrategy, with interests both in the Middle East and North Africa, as well as in the Caucasus and Central Asia, where President Erdogan has traced the axis of world pan-turanism, in his attempt to bring together all the states of Turkish-Mongolian origin.

At the same time, from an economic perspective, it should be noted that the Turkish straits are transited daily by about 3 million barrels of oil per day.

Although fluctuating, Russian Turkish relations are marked by the economic and commercial interests of the Turks and the strategic interests of the Russians. More recently, with the outbreak of the Russian Ukrainian conflict in February 2022, Turkey asserts itself as a mediator and a factor of stability in the area.

Of the other three Pontic countries - Romania, Bulgaria and Georgia - it draws attention to Moscow's policy by which it limited the pro-European tendencies of the Caucasians, continuing to ensure its presence in Transcaucasia through the two enclaves it controls on Georgian territory, Abkhazia and South Ossetia. This is even though Russia has lost control of Armenia, defeated in the conflict with Erdogan-backed Azerbaijan.

Currently, the Armenian Azerbaijani peace proposed by Donald Trump by operationalizing the Zangezur Corridor that crosses Armenia, uniting Azerbaijan with the Azerbaijani enclave between Armenia and Turkey, Nakhchevan, ensures the American presence in the Caucasus and the transit of oil products on the Turkey-Caucasus-Central Asia axis.

Russian Bulgarian relations, beyond the cultural-historical affinities determined by belonging to the great family of the Slavic peoples, experienced sinusoids after Bulgaria's accession to NATO and the EU. Sofia has stopped certain Russian initiatives to transport gas and oil products on its territory to Europe, but a certain substantial part of its leaders, such as President Rumen Radev, continue to show goodwill towards Moscow.

Romania's accession to NATO and the EU, but especially our country's strategic partnership with the US, make Bucharest the main opponent of the Putin regime in the Pontic

[1] UNCLOS was signed on 10 December 1982 and entered into force in 1994, establishing the boundaries of territorial maritime waters, continental shelves and exclusive economic zones belonging to riparian states

region. The anti-missile shield in Deveselu, the military bases in Câmpia Turzii and especially Mihail Kogălniceanu, were qualified by the Putin regime as a threat to Moscow. Diplomatic relations are currently cold, with Moscow adding Romania to the list of unfriendly countries. Even more so since on Moldovan territory the Russian Romanian hybrid war has often taken on acute forms, it is seen as being in a connection with the conflict in Ukraine. Like Ukraine, Moldova wants to belong to the Euro-Atlantic world, while the reminiscences of the Russian world in Chisinau manifest themselves systematically, obstructing the European path of the second Romanian republic.

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INTERNATIONAL LAW AND THE LEGITIMACY OF GLOBAL SECURITY INSTITUTIONS: CHALLENGES, CASE STUDIES, AND REFORM PATHWAYS

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Abstract

Global security institutions, including the United Nations Security Council and regional organizations, are central to addressing contemporary threats to international peace and stability. Yet, their legitimacy remains a subject of intense debate, particularly when their actions or inactions are perceived as inconsistent with international law or global expectations. This paper investigates the intricate relationship between international law and the legitimacy of global security institutions, analyzing how legal frameworks both empower and constrain their operations. By examining foundational legal documents, customary norms, and landmark interventions, including Kosovo, Libya, and Syria, the study identifies key sources of legitimacy and highlights persistent challenges such as selective enforcement, the dominance of major powers, and gaps in representation.

The analysis extends to emerging issues like humanitarian intervention without Security Council authorization, responses to cyber threats, and the increasing influence of non-state actors. Drawing on comparative case studies, empirical evidence, and recent developments, the paper proposes avenues for institutional reform including greater inclusivity, enhanced accountability, and legal oversight, to strengthen credibility and effectiveness. The findings emphasize that adherence to international law and the pursuit of inclusive, transparent governance are essential for global security institutions to maintain legitimacy and fulfill their mandates in an evolving international order.

Keywords: International law; legitimacy; global security institutions; United Nations; institutional reform

Introduction

The landscape of international security in the twenty-first century is increasingly complex, marked by a proliferation of both traditional and non-traditional threats. From protracted interstate conflicts and humanitarian crises to the ever-evolving challenges of cyber-attacks and transnational terrorism, the need for robust and adaptive mechanisms to maintain international peace and stability remains acute[2]. In response, global security institutions such as the United Nations Security Council (UNSC), the North Atlantic Treaty Organization (NATO), the African Union (AU), and the Organization for Security and Co-operation in Europe (OSCE) have assumed central roles in the management and resolution of security threats worldwide[3]. Yet, the effectiveness of these institutions is not determined

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[2] United Nations, *Global Trends 2040: A More Contested World,* 2021, https://www.dni.gov/files/images/globalTrends/GT2040/GlobalTrends_2040_for_web1.pdf (12.03.2026)

[3] Hurd Ian, *After Anarchy: Legitimacy and Power in the United Nations Security Council*, Princeton University Press, Princeton, 2007, pp. 30-33

solely by their capacity to deploy resources or enforce mandates. At the core of their enduring impact lies the notion of legitimacy, the widespread perception that their authority is justified, their actions are appropriate, and their decisions are made in accordance with established legal, moral, and political standards[1]. Legitimacy is not only a matter of compliance with international law; it is also essential for securing cooperation from member states, gaining the support of the international community, and ensuring the sustainability of peace and security initiatives. For example, empirical studies show that UN peacekeeping operations with higher perceived legitimacy are more likely to secure host-state consent and public cooperation[2]. Despite the foundational role of international law in shaping the mandates and operations of global security institutions, questions persist about the adequacy and consistency of this legal framework in conferring legitimacy. Criticisms related to selective enforcement, power asymmetries, and gaps in representation, such as the lack of permanent Security Council seats for Africa or Latin America, have sparked ongoing debates among scholars and practitioners alike[3]. Moreover, the emergence of new security challenges, such as unauthorized humanitarian interventions (Kosovo 1999), cyber threats, and the growing influence of non-state actors, has further complicated the legitimacy landscape. Against this backdrop, the present paper seeks to critically investigate the relationship between international law and the legitimacy of global security institutions. The central research questions guiding this inquiry are: How does international law shape the legitimacy of global security institutions? What principal challenges undermine this legitimacy in practice? And what reforms are necessary to enhance the credibility and effectiveness of these institutions?

This analysis focuses on the UNSC, NATO, AU, and OSCE, employing a multidisciplinary methodology that combines legal analysis, comparative case studies, empirical data, and institutional review. Drawing on foundational legal documents, customary norms, and landmark interventions, the paper identifies key sources of institutional legitimacy, highlights persistent challenges, and proposes pathways for reform. The subsequent sections will first establish the conceptual and theoretical framework, then examine specific case studies, analyse core challenges and emergent issues, and finally offer recommendations for strengthening legitimacy in global security governance in the contemporary era.

Theoretical and Conceptual Foundations

Defining Legitimacy in Global Security Institutions

Legitimacy is a foundational concept in international relations and legal studies, especially as it pertains to global security institutions[4]. At its core, legitimacy refers to the widespread acceptance of an institution's authority and its right to exercise power. In the context of international organizations such as the United Nations Security Council (UNSC), the North Atlantic Treaty Organization (NATO), and other regional bodies, legitimacy is

[1] Thomas M. Franck, *Legitimacy in the International System,* "American Journal of International Law", Vol 82, No. 4, 1988, pp. 705–59

[2] Lise Morjé Howard*, UN Peacekeeping in Civil Wars*, Cambridge University Press, Cambridge, 2008, pp. 112-114

[3] African Union, *The Common African Position on the Proposed Reform of the United Nations: The Ezulwini Consensus,* 2005. https://td-sa.net/index.php/td/article/view/387/507 (12.03.2026)

[4] Thomas M. Franck, *Op. cit.,* p. 43

essential for ensuring compliance, garnering support, and maintaining the credibility of collective security measures[1].

Scholars distinguish between several dimensions of legitimacy. Legal legitimacy derives from conformity with established rules, treaties, and legal frameworks. Moral legitimacy is rooted in the alignment of institutional actions with shared values, such as human rights and justice. Sociopolitical legitimacy encompasses the perceptions of member states, affected populations, and the broader international community[2]. For example, survey data from the Lowy Institute and UNDP indicate that public support for UN peacekeeping in sub-Saharan Africa is closely tied to perceptions of fairness and local participation[3].The interplay among these forms of legitimacy shapes the authority and effectiveness of security institutions in a dynamic and often contested global environment.

The Role of International Law in Legitimacy

International law provides the normative foundation for the existence and operation of global security institutions. The UN Charter, for instance, establishes legal parameters for collective security, the use of force, and the peaceful settlement of disputes.[4] Compliance with such foundational legal documents is widely regarded as a precondition for institutional legitimacy. The International Court of Justice (ICJ) has also played a significant role in shaping the legal dimension of legitimacy, most notably through its 2010 Advisory Opinion on Kosovo's declaration of independence. This opinion addressed the legality of secession and contributed to ongoing debates about the scope of international law in conferring or withholding legitimacy in contested situations.

However, the relationship between international law and legitimacy is complex. While legal conformity is necessary, it is not always sufficient to guarantee widespread acceptance. For instance, actions that are technically legal but perceived as unjust or exclusionary may struggle to gain broad-based legitimacy[5]. Conversely, interventions that deviate from strict legal mandates but are widely viewed as morally necessary, such as NATO's intervention in Kosovo, may attain a form of "pragmatic legitimacy"[6]. The debate over Kosovo (1999) is frequently cited as an example where procedural legality diverged from moral legitimacy[7].

Theoretical Approaches to Legitimacy in International Relations

Realist theorists, such as John Mearsheimer, argue that legitimacy is largely a function of power and the interests of dominant states[8]. From this perspective, institutions such as the UNSC derive their authority primarily from the consent and cooperation of major powers, rather than from legal or moral considerations. In contrast, liberal-institutionalist scholars, including Robert Keohane, emphasize the importance of rules, norms, and

[1] Allen Buchanan, Robert O. Keohane, *The Legitimacy of Global Governance Institutions*, "Ethics&International Affairs", Vol. 20, No. 4, 2006, pp. 414–418

[2] Alex Oliver, *2019 Lowy Institute Poll: Confidence in International Institutions*, Lowy Institute, 2019, https://poll.lowyinstitute.org/ (12.03.2026)

[3] UNDP, *Perception Survey: UN Peace Operations in Africa,* 2018, https://erc.undp.org/evaluation/documents/download/18692 (12.03.2026)

[4] Charter of the United Nations, 1945, Art. 24, https://www.un.org/en/about-us/un-charter/full-text, (12.03.2026)

[5] Thomas M. Franck, *Op. cit.,* p. 751

[6] Nicholas J. Wheeler, *Saving Strangers: Humanitarian Intervention in International Society*, Oxford University Press, Oxford, 2000, pp. 288–289

[7] *Idem*

[8] John J. Mearsheimer, *The Tragedy of Great Power Politics*, W.W. Norton, New York, 2001, pp. 32–36

institutional procedures in generating legitimacy[1]. According to this view, transparent decision-making, inclusivity, and adherence to established legal frameworks are essential for maintaining the authority of international organizations.

A third perspective, constructivism (e.g., Alexander Wendt), focuses on the role of shared ideas, identities, and norms in shaping the legitimacy of institutions. [2]Constructivist scholars argue that legitimacy is socially constructed, contingent upon the recognition and acceptance of institutional authority by relevant actors. This helps explain why interventions like the AU's peace operations in Mali may be viewed as legitimate in African contexts even when they receive limited Western support.

Sources of Legitimacy: Legal, Procedural, and Substantive

Legal legitimacy is grounded in formal mandates conferred by treaties, charters, and customary international law. For example, the UN Charter explicitly authorizes the Security Council to take measures to maintain or restore international peace and security[3]. Procedural legitimacy relates to the fairness, transparency, and inclusivity of institutional decision-making processes; institutions that adhere to clear and consistent rules, provide avenues for participation, and ensure procedural justice are more likely to be perceived as legitimate[4].

Substantive legitimacy is concerned with the outcomes of institutional actions, particularly their consistency with widely held values such as human rights, justice, and the rule of law. For instance, the Security Council's inability to protect civilians in Syria, despite legal and procedural authority, has been widely viewed as a failure of substantive legitimacy[5].

The Relationship between Legitimacy, Effectiveness, and Authority

The legitimacy of global security institutions is closely linked to their effectiveness and authority. Institutions that are viewed as legitimate are more likely to secure compliance, attract resources, and foster cooperation among member states and stakeholders[6]. Conversely, legitimacy deficits can undermine institutional authority, hinder enforcement, and erode public trust. For example, the lack of perceived legitimacy in some UN peacekeeping missions has led to non-cooperation by local actors and even mission withdrawal[7]. There is a dynamic relationship between legitimacy and authority. While legal authority is derived from formal mandates, its practical realization depends on the perceived legitimacy of institutional actions. When institutions lose legitimacy, whether due to selective enforcement, lack of representation, or perceived injustice, their authority to act may be called into question, leading to diminished effectiveness and greater contestation.

Legitimacy is a multifaceted and contested concept within global security governance, encompassing legal, moral, and political dimensions shaped by the interplay of international law, institutional practice, and stakeholder perceptions[8]. While compliance with legal

[1] Robert O. Keohane, *After Hegemony: Cooperation and Discord in the World Political Economy*, Princeton University Press, Princeton, 1984, pp. 243–246

[2] Alexander Wendt, *Social Theory of International Politics*, Cambridge University Press, Cambridge, 1999, pp. 35–36

[3] Charter of the United Nations, Art. 39–42, https://treaties.un.org/doc/publication/ctc/uncharter.pdf (12.03.2026)

[4] Anne Peters, *The Accountability of International Organizations*, "The Oxford Handbook of International Organizations", Jacob Katz Cogan (Ed.), Oxford University Press, Oxford, 2016, pp. 1032–1035

[5] Ian Johnstone, *The Security Council and Syria: Deadlock and Its Discontents*, "Survival" Vol. 56, No. 1, 2014, pp. 19–35

[6] Thomas M Franck, *Op. cit,* pp. 749

[7]Lise Morjé *Howard, Op. cit,* Ch. 8, pp. 220–225

[8] Allen Buchanan, Robert O. Keohane *Op. cit.,* p. 85

mandates is necessary, it is not sufficient. The procedures by which decisions are made, the values embodied in institutional actions, and the broader context of power and representation all play critical roles in shaping legitimacy[1]. As global security institutions continue to confront new and complex challenges, ranging from humanitarian crises and armed conflict to cyber threats and the rise of non-state actors, a nuanced understanding of legitimacy will be essential. Only by addressing both the legal foundations and the sociopolitical dynamics of legitimacy, and by grounding reforms in empirical realities, can these institutions maintain their authority, secure broad-based support, and effectively fulfill their mandates in the contemporary.

Sources and Architecture of Institutional Legitimacy Legal Instruments: Foundations of Legitimacy

The legitimacy of global security institutions is fundamentally grounded in international legal instruments, most notably the United Nations Charter, multilateral treaties, and customary international law. The UN Charter, for example, vests the Security Council with "primary responsibility for the maintenance of international peace and security," providing a unique legal mandate and clear authority for collective action[2]. This legal foundation is reinforced by other treaties, such as the North Atlantic Treaty (1949), which established NATO[3] and the Constitutive Act of the African Union (2000)[4], each of which sets explicit frameworks for security cooperation. Customary international law also plays a critical role. Principles such as the prohibition of aggression, non-intervention, and the inherent right of self-defence (as reflected in Article 51 of the UN Charter) have become embedded in customary law, shaping expectations for both institutional conduct and member state compliance[5].

Critical Perspective

Scholars from the Global South have frequently argued that postcolonial legal structures continue to marginalize regional organizations in decision-making and crisis response[6]. For instance, Siba Grovogui highlights how the slow and insufficient global response to the Rwandan genocide exposed the limitations of a system where African agency was systematically sidelined[7]. The Ezulwini Consensus, adopted by the African Union in 2005, further illustrates these concerns by demanding stronger African representation and authority within global security institutions[8].

Procedural Legitimacy: Decision-Making Processes. Beyond legal mandates, the legitimacy of security institutions depends on the fairness, transparency, and inclusivity of

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[1] Siba N'Zatioula Grovogui, *Regimes of Sovereignty: International Morality and the African Condition*, University of Chicago Press, Chicago, 1996, pp. 137–145

[2] Charter of the United Nations, 24 October 1945, 1 U.N.T.S. XVI, art. 24, https://treaties.un.org/doc/publication/ctc/uncharter.pdf (12.03.2026)

[3] North Atlantic Treaty, 4 April 1949, 34 U.N.T.S. 243, https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/1949/04/04/the-north-atlantic-treaty(12.03.2026)

[4] Constitutive Act of the African Union, 11 July 2000, OAU Doc. CAB/LEG/23.15, https://hrlibrary.umn.edu/africa/auconst-act2001.html (12.03.2026)

[5] Charter of the United Nations, art. 51, https://treaties.un.org/doc/publication/ctc/uncharter.pdf, (12.03.2026); Ian Brownlie*, Principles of Public International Law,* 8th Ed, Oxford University Press, Oxford, 2012, pp. 732-733

[6] Siba N'Zatioula Grovogui, *Op. cit.,* pp. 120–145

[7] *Ibidem*, pp. 137–138

their decision-making processes. Procedural legitimacy is achieved when rules are applied consistently, when decisions are made through participatory and representative mechanisms, and when affected parties are given meaningful opportunities for input.[1] The United Nations Security Council's voting system, for example, requires the concurrence of all five permanent members (the "P5") for substantive decisions. While this structure reflects the political realities of the post-World War II era, it has been widely criticized for enabling paralysis and selective action through the veto, as seen in the repeated blockage of resolutions on Syria[2]. The Security Council's inaction in the face of mass atrocities, despite overwhelming international consensus, has led to accusations of procedural injustice and eroded legitimacy in the eyes of many member states and civil society actors[3].

By contrast, the OSCE's consensus-based approach, where all participating states must agree on major decisions, embodies a different procedural model. This fosters inclusivity and equal standing but can also result in gridlock, as any single state can block action[4]. Empirical research suggests that regional organizations with more transparent and participatory decision-making structures, such as the African Union Peace and Security Council, are often viewed as more legitimate by their stakeholders[5].

Substantive Legitimacy. Alignment with Global Values Substantive legitimacy is measured by the degree to which institutional actions align with widely shared global values, especially human rights, justice, the rule of law, and the protection of civilians[6]. For example, the UNSC's authorization of collective action in Libya in 2011 (Resolution 1973) was widely regarded as legitimate because it aimed to prevent mass atrocities, in line with the emerging Responsibility to Protect (R2P) norm[7]. However, when the intervention shifted toward regime change without clear post-conflict planning, critics argued that this undermined both the legitimacy of the action and the credibility of the Security Council[8]. Conversely, the Council's inability to intervene effectively in cases like Syria, due to repeated vetoes, has been interpreted as a failure of substantive legitimacy, as the institution appeared unable to fulfil its own stated principles of civilian protection and conflict resolution[9]. This disconnects between legal/procedural authority and substantive outcomes highlights the importance of aligning actions with global values.

Synthesis: The Architecture of Legitimacy. The legitimacy of global security institutions emerges from a dynamic interplay of legal, procedural, and substantive elements. Legal instruments provide formal authority and structure; procedural mechanisms ensure fairness, transparency, and representation; and substantive outcomes determine whether

[1] Anne Peters, *Op. cit.,* pp. 1026–1047
[2] Security Council Report, "Security Council Vetoes," https://www.securitycouncilreport.org/atf/cf/%7B65BFCF9B-6D27-4E9C-8CD3-CF6E4FF96FF9%7D/veto_table.pdf (12.03.2026)
[3] Ian Johnstone, *Op. cit.,* pp. 19–23
[4] OSCE, "Consensus and the OSCE," https://www.osce.org/consensus (12.03.2026)
[5] Tim Murithi, *The African Union's Evolving Role in Peace Operations: The African Standby Force and Beyond*, "African Security Review", Vol. 17, No. 1, 2008, pp. 71–82, https://www.files.ethz.ch/isn/101652/FULL.pdf (12.03.2026)
[6] Allen Buchanan, Robert O. Keohane, *Op cit.,* pp .405–37
[7] United Nations Security Council Resolution 1973 (2011), https://unscr.com/en/resolutions/1973/, (12.03.2026)
[8] Aidan Hehir, *The Permanence of Inconsistency: Libya, the Security Council and the Responsibility to Protect,* "International Security", Vol 38, No. 1, 2013, pp. 137–159
[9] Ian Johnstone, *Op. cit*., pp. 20–27

institutional actions are consistent with the evolving expectations and values of the international community[1]. See Figure 1 below.

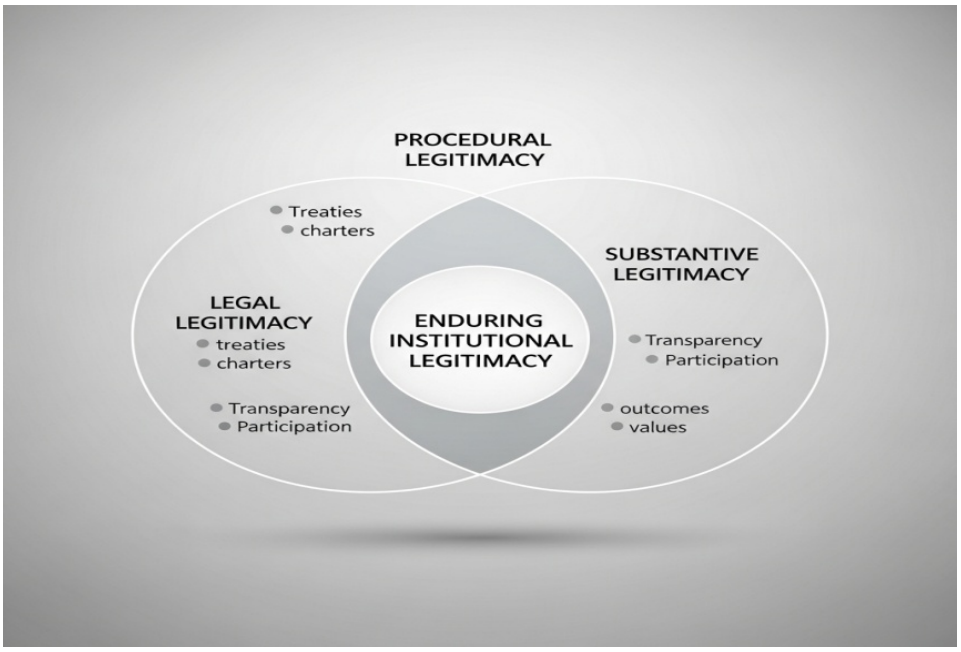

Figure 1. Procedural legitimacy[2]

No single dimension is sufficient on its own; rather, enduring legitimacy depends on the integration and balance of all three. Recent scholarship increasingly emphasizes the need for reforms that address representation, procedural fairness, and real-world outcomes to strengthen the legitimacy and effectiveness of global security governance[3].

[1] Allen Buchanan, Robert O. Keohane, *Op Cit*., pp. 422 –423
[2] Author`s research
[3] Anne Orford, *International Authority and the Responsibility to Protect, Cambridge Studies in International and Comparative Law,* Cambridge University Press, Cambridge, 2011, p. 67

Case Studies: Practice, Precedent, and Perception

Empirical case studies offer critical insight into how international law interacts with institutional legitimacy in real-world security crises. By examining landmark interventions, we can assess how legal, procedural, and substantive elements of legitimacy are constructed, challenged, or eroded in practice.

Case Selection Criteria: The case studies of Kosovo (1999), Libya (2011), and Syria (2011–present) were selected based on their status as landmark interventions that exemplify the complex interplay between legal mandates, procedural processes, and substantive outcomes in global security governance. Each case presents a distinct set of legitimacy challenges, from humanitarian intervention without Security Council authorization (Kosovo), to legally authorize but controversial outcomes (Libya), to procedural paralysis and selective enforcement (Syria). These examples thus provide a comprehensive basis for analysing the varying dimensions of legitimacy across different legal and political contexts.

Kosovo (1999): Humanitarian Imperative versus Legal Authority

In 1999, NATO launched an aerial campaign against the Federal Republic of Yugoslavia in response to mounting humanitarian abuses in Kosovo. Legally, the intervention was controversial: the UN Security Council did not authorize the use of force, as Russia and China threatened to veto any enabling resolution. [1]Thus, the campaign lacked explicit legal sanction under the UN Charter, which generally prohibits the use of force except in self-defence or with Security Council approval.

NATO justified its action on humanitarian grounds, arguing the need to prevent ethnic cleansing and mass atrocities. While many Western states and human rights organizations defended the operation as morally legitimate and consistent with emerging norms such as the Responsibility to Protect (R2P), others, including Russia, China, and numerous Global South states, condemned it as a violation of state sovereignty and a dangerous precedent for unilateral intervention[2]. Academic debate crystallized around the concept of "illegal but legitimate" action: while the intervention contravened strict legal procedures, it was widely seen as morally necessary[3]. This divergence between legal and moral legitimacy highlights the complex reality that compliance with international law may not always align with broader perceptions of justice or necessity. The Kosovo case continues to influence debates on the limits of legal authority and the scope of humanitarian intervention.

The ICJ's Advisory Opinion (2010) on Kosovo's declaration further influenced international perceptions of the legal legitimacy of intervention and self-determination, reinforcing the complexity of aligning procedural legality with broader principles of justice and legitimacy.

Libya (2011): Authorized Intervention and Its Aftermath

The 2011 international intervention in Libya was, at least initially, a textbook example of legal legitimacy. The Security Council, invoking Chapter VII of the UN Charter, passed Resolution 1973, authorizing member states to take "all necessary measures" to protect civilians facing imminent threat from the Gaddafi regime[4]. This explicit legal mandate garnered broad, though not universal, support, including from the Arab League and African Union.

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[1] Nicholas J. Wheeler, *Saving Strangers: Humanitarian Intervention in International Society*, Oxford University Press, Oxford, 2000, pp. 257–59

[2] *Ibidem,* pp. 289–91

[3] *Ibidem,* p. 293

[4] Alex J. Bellamy, Paul D. Williams, *The New Politics of Protection? Côte d'Ivoire, Libya and the Responsibility to Protect,* "International Affairs", Vol. 87, No. 4, 2011, pp. 827–29

However, as NATO operations progressed, the mission expanded from civilian protection to regime change, raising questions about "mandate creep." Critics, especially from the Global South and some European states, argued that the coalition had overstepped its legal authority and undermined the principle of limited intervention[1]. The aftermath of the intervention, marked by state collapse, civil conflict, and regional instability, further complicated assessments of legitimacy.[2] While the operation initially enjoyed legal and procedural legitimacy, the negative substantive outcomes led to widespread reassessment.

Libya demonstrates that Security Council authorization, while vital for legal legitimacy, is not alone sufficient. Substantive legitimacy, measured by consistency with humanitarian objectives and long-term stability, remains essential for the enduring credibility of security interventions.

Syria (2011–Present): Paralysis, Double Standards, and Legitimacy Erosion

The ongoing conflict in Syria offers a stark contrast. Despite extensive evidence of mass atrocities and repeated calls for action, the Security Council has been paralyzed by the vetoes of Russia and China, blocking collective intervention[3]. This procedural deadlock, in the face of grave human rights violations, has severely damaged the Council's legitimacy and credibility[4].

Some states have pursued unilateral or coalition-based actions, such as airstrikes against ISIS, arguing a moral imperative to act where formal mechanisms fail. However, these efforts have been contested both legally and politically, with some critics arguing that bypassing the Council further undermines global norms and risks deepening great-power rivalries[5]. Civil society voices, regional organizations, and affected populations have repeatedly criticized the Security Council's inaction as emblematic of selective enforcement and major-power dominance. Public opinion surveys in the Middle East and North Africa indicate widespread disillusionment with the legitimacy of global security institutions in the wake of the Syrian crisis.

Comparative Insights

Taken together, these case studies underscore the complex and context-dependent nature of institutional legitimacy in global security governance. Kosovo demonstrates how moral necessity may sometimes override strict legal procedures, while Libya illustrates that even fully authorized interventions can lose legitimacy due to outcome divergence or mandate abuse. Syria, by contrast, exposes the dangers of procedural paralysis and selective enforcement, showing that institutional inaction can be as damaging to legitimacy as controversial intervention. For a visual summary of these main comparative insights, including the legal, procedural, and substantive dimensions of legitimacy, as well as their real-world outcomes, see Table 1 below. This table distils the core lessons from each case, highlighting the dynamic interplay between law, process, and perception in shaping the legitimacy of global security interventions.

[1] *Ibidem,* pp. 836–39
[2] *Ibidem*, pp. 845–48
[3] Security Council Report, *Security Council Vetoes,* https://www.securitycouncilreport.org/atf/cf/%7B65BFCF9B-6D27-4E9C-8CD3-CF6E4FF96FF9%7D/veto_table.pdf, (12.03.2026)
[4] Ian Johnstone, *Op. Cit.,* pp, 23–25
[5] *Ibidem,* pp. 26–27

Case	Legal Basis	Procedural Legitimacy	Substantive Legitimacy	Outcome/Perception	Key References
Kosovo (1999)	No UNSC authorization; intervention justified on humanitarian grounds; considered "illegal but legitimate" by some	UNSC bypassed due to anticipated vetoes; NATO acted without collective Security Council mandate	Seen as morally necessary by many Western states and NGOs; condemned by Russia, China, and many Global South states	Sparked enduring debate over "illegal but legitimate" interventions; set precedent for humanitarian intervention without UNSC approval	Wheeler 2000, Ch. 9; Franck 1988, pp. 706–707
Libya (2011)	Explicit UNSC authorization (Res. 1973) under Chapter VII; clear legal mandate for civilian protection	Initial broad procedural legitimacy; operation later criticized for "mandate creep" beyond civilian protection	Initial support for R2P; legitimacy eroded as mission shifted to regime change and post-conflict instability emerged	State collapse, civil conflict, and regional instability; legitimacy questioned post-intervention	Bellamy& Williams 2011, pp. 827–29, pp. 845–48; Hehir 2013, pp. 137–159
Syria (2011–Present)	No collective authorization for intervention; repeated UNSC vetoes blocked action	Severe procedural paralysis; P5 vetoes (esp. Russia, China) prevented coordinated response	Widespread perception of institutional failure to uphold humanitarian norms and protect civilians	Legitimacy of UNSC severely damaged; deepened disillusionment in MENA; selective enforcement and erosion of credibility	Johnstone 2014, pp. 23–27; Security Council Report 2024; Oliver 2019, pp. 11–13

Table 1. Comparative Analysis of Kosovo (1999), Libya (2011), and Syria (2011–Present)[1]

Structural and Political Challenges to Legitimacy

While legal frameworks and procedural mechanisms are essential for establishing the authority of global security institutions, a range of structural and political challenges continue to undermine their legitimacy in practice. These challenges are most acutely observed in the context of power asymmetries, deficits in representation, selective enforcement, and the exclusion of affected populations from decision-making processes.

Power Asymmetries: The Security Council Veto and Major-Power Privilege

The United Nations Security Council (UNSC) exemplifies the enduring relevance of power politics in global security governance. The veto power held by the five permanent members (P5), the United States, the United Kingdom, France, Russia, and China, was initially designed to secure the participation of the major victors of World War II and prevent unilateral action against their interests.[2] However, in the contemporary era, the veto is widely criticized as an instrument that enables major-power privilege and selective inaction, often at the expense of collective security and humanitarian imperatives. Empirical data shows that since 2011, Russia and China have exercised their veto on over a dozen draft resolutions pertaining to Syria alone, frequently blocking even humanitarian access. [3]This persistent use of the veto has triggered widespread frustration among other member states and civil society,

[1] Author` research
[2] Ian Hurd, *Op. cit*., pp. 25–49
[3] Security Council Report, *Security Council Vetoes*, https://www.securitycouncilreport.org/atf/cf/%7B65BFCF9B-6D27-4E9C-8CD3-CF6E4FF96FF9%7D/veto_table.pdf (15.03.2026)

who argue that it has led to paralysis in the face of mass atrocities and undermined the credibility and legitimacy of the Security Council[1].

Representation and Inclusivity: The Global South and Marginalized Voices

A second major challenge relates to the composition and representativeness of global security institutions. The current structure of the UNSC, with no permanent members from Africa, Latin America, or the Middle East, reflects the geopolitical realities of 1945 rather than the diversity of the contemporary international system. The African Union and the Group of Four (G4) nations (Germany, Brazil, India, Japan) have long advocated for reforms to address these imbalances, as captured in the Ezulwini Consensus and numerous UN General Assembly debates[2]. The lack of equitable representation not only weakens procedural legitimacy but also diminishes the substantive legitimacy of decisions, as affected regions and populations frequently feel excluded from processes that fundamentally impact their security and sovereignty[3]. Research shows that when regional organizations like the African Union or ASEAN are given meaningful roles in peace operations, local buy-in and mission effectiveness tend to increase[4]. Selective Enforcement and Double Standards - selective enforcement of international norms and resolutions is another persistent source of legitimacy erosion. Critics argue that the application of Security Council mandates and international law is often shaped by the interests of powerful states rather than by principled consistency[5]. For instance, the swift authorization of intervention in Libya, 2011, contrasted sharply with the lack of action in Syria or Yemen, despite similar harms to civilians[6].

This perceived double standard has led to accusations of hypocrisy, particularly from states in the Global South and from non-state actors. It also fuels scepticism about the universality of the international legal order and undermines the willingness of states to cooperate with institutions they perceive as politicized or biased[7]. Affected Populations and Civil Society - a final structural challenge is the limited participation of affected populations and civil society organizations in decision-making processes. Although the Security Council and other bodies occasionally consult with NGOs or representatives of local communities, most deliberations remain dominated by state actors, particularly the P5 and other powerful states[8]. This exclusion weakens both the legitimacy and effectiveness of security interventions. Studies of peacekeeping and post-conflict reconstruction highlight the importance of local ownership, transparency, and inclusive processes for building trust and sustaining peace. [9]Affected populations are more likely to perceive interventions as legitimate, and to cooperate with them, when their voices are meaningfully included. Emergent Challenges in Legitimacy Discourse As the security landscape evolves, global security institutions face a series of new and intensified challenges that further complicate

[1] Ian Johnstone, *Op. cit*., pp. 19–35
[2] Sebastian von Einsiedel et al., *The UN Security Council in an Age of Great Power Rivalry*, United Nations University Centre for Policy Research, 2023
[3] Siba N'Zatioula Grovogui, *Op.cit,* pp. 137–45
[4] Tim, Murithi, *The African Union's Evolving Role in Peace Operations*, "African Security Review", Vol. 17, No. 1, 2008, pp. 71–82
[5] Anne Orford, *International Authority and the Responsibility to Protect, Cambridge Studies in International and Comparative Law,* Cambridge University Press, Cambridge, 2011, pp. 201–218
[6] Aidan Hehir, *The Permanence of Inconsistency: Libya, the Security Council and the Responsibility to Protect,* "International Security Journal", Vol. 38, No. 1, 2013, pp. 137–59
[7] Buchanan and Keohane, *Op. cit.*, pp. 405–37
[8] Jan Wouters; Jonas Wouters. *Civil Society Participation in Global Governance: The Cases of the United Nations and the European Union*, "Global Policy", Vol. 6, No. 2, 2015, pp. 148–57
[9] Lise Morjé Howad, *Op. cit.,* Ch. 8.

their legitimacy. These emergent issues stem from shifting patterns of conflict, technological innovation, changing power dynamics, and the rise of new actors and norms.

Humanitarian Intervention and the Evolution of the Responsibility to Protect (R2P)

The emergence of the Responsibility to Protect (R2P) norm has both enriched and complicated debates over legitimacy. Traditionally, the use of force in international law was strictly limited by the principles of state sovereignty and non-intervention, as enshrined in Article 2(4) of the UN Charter. [1] However, failures to prevent atrocities in Rwanda (1994) and Srebrenica (1995) galvanized calls for a more proactive international response. R2P, endorsed at the 2005 World Summit, redefined sovereignty to include a responsibility to protect populations from genocide, war crimes, ethnic cleansing, and crimes against humanity.[2] While R2P has provided a normative framework for humanitarian intervention, its implementation has been inconsistent and highly contested. The intervention in Libya (2011) was initially hailed as a successful application of R2P, but subsequent regime collapse and civil conflict led to criticisms of overreach and concerns that humanitarian justifications could be misused for political goals. [3] Conversely, in Syria, despite widespread atrocities, the Security Council's deadlock has demonstrated the limits of R2P in the face of major-power rivalry and procedural vetoes[4]. These cases reinforce the tension between respecting state sovereignty and fulfilling moral/legal obligations to protect civilians, raising difficult questions regarding when and how legitimacy is established or lost in practice.

Cybersecurity, Information Warfare, and Legal Gaps The digital revolution has resulted in new forms of conflict that challenge traditional models of legitimacy and international law. Cyberattacks, disinformation campaigns, and "hybrid" warfare are increasingly used by both state and non-state actors to undermine national security, disrupt critical infrastructure, and influence political processes[5]. Existing legal frameworks, developed for an analog era, often lack the specificity and enforcement mechanisms necessary to address cyber threats. For instance, there is currently no comprehensive international treaty governing state behaviour in cyberspace, and attribution for cyberattacks remains technically and politically challenging[6]. Recent developments, including the United Nations Open-Ended Working Group (OEWG) process on cybersecurity (2024–2025), have sought to update and clarify norms and cooperative mechanisms for state behaviour in cyberspace. These efforts reflect the evolving landscape of cyber governance and the necessity for global institutions to remain current and responsive to technological change[7]. Global South states and civil society organizations have argued that cyber governance must account for digital divides and technological inequalities, fearing that current norm-setting is

[1] Charter of the United Nations, *Op. cit*., Art. 2(4)

[2] United Nations, "2005 World Summit Outcome," A/RES/60/1, https://www.un.org/en/development/desa/population/migration/generalassembly/docs/globalcompact/ARES60_1.pdf (24.04.2026)

[3] Alex J. Bellamy, *Libya and the Responsibility to Protect: The Exception and the Norm*, "Ethics&International Affairs", Vol. 25, No. 3, 2011, pp. 263–269

[4] Ian Johnstone, *Op cit*., pp 19–35

[5] Michael N. Schmitt, (Ed.), *Tallinn Manual 2.0 on the International Law Applicable to Cyber Operations*, Cambridge University Press, Cambridge, 2017, p. 34

[6] *Ibidem*, pp. 12-18

[7] United Nations, *Open-ended Working Group on Developments in the Field of Information and Telecommunications in the Context of International Security*, A/AC.290/2021/CRP.2, https://database.cyberpolicyportal.org/en/entity/qvze094daaf/relationships?file=1676530797055mtym3o7f32d.pdf&page=7 (15.03.2026)

dominated by a handful of technologically advanced actors[1]. As cyber threats escalate, the inability of traditional institutions to adapt may further erode their legitimacy and relevance.

The Proliferation of Non-State Actors

Non-state actors, including international NGOs, private military companies, terrorist groups, and transnational corporations, play increasingly influential roles in conflict and security governance. [2]While NGOs have often enhanced legitimacy by advocating for affected populations and holding institutions accountable, the involvement of private actors in combat, security provision, and even norm-setting creates new challenges for transparency and accountability.[3] For example, the use of private military contractors in Iraq and Ukraine has raised concerns about legal responsibility, while the activities of transnational advocacy networks have strengthened the influence of civil society in shaping global norms[4]. However, the rise of violent non-state actors, such as terrorist organizations, raises complex questions about engagement, legitimacy, and the extension of international legal protections.

As the boundaries of legitimate authority become more diffuse, institutions must develop new frameworks for recognizing, regulating, and collaborating with diverse actors, while avoiding the pitfalls of fragmentation and inconsistent accountability.

Multipolarity, Shifting Alliances, and Norm Contestation

The increasing multipolarity of the international system, marked by the resurgence of China, India, and other regional powers, as well as shifting alliances, has contributed to the contestation of existing global norms and the authority of traditional institutions.[5] Competing visions for international order, for example, the "democratic peace" promoted by Western states versus the "sovereignty-first" approach favoured by some Global South and authoritarian regimes, have resulted in fragmented approaches to legitimacy.

Regional organizations (such as the Shanghai Cooperation Organization or African Union) sometimes offer alternative models for security governance, challenging the perceived universality of UN norms and procedures[6]. This pluralization of authority can either supplement global institutions by providing context-specific legitimacy or further undermine collective action by fuelling norm competition and institutional rivalry.

Institutional Reform and the Future of Legitimacy

The persistent challenges and emergent threats facing global security institutions have spurred calls for comprehensive reform. Scholars, practitioners, and affected populations increasingly argue that only by adapting their structures, processes, and mandates can institutions like the United Nations Security Council (UNSC), NATO, and regional organizations restore and sustain their legitimacy in a rapidly changing world.

Reforming Representation, the Veto, and Inclusivity. One of the most enduring critiques of the UNSC and comparable bodies is their outdated structure and lack of equitable representation. Despite a dramatic increase in UN membership since 1945 and the rise of new global powers, the Council's permanent membership remains static, with no seats for Africa,

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[1] Elonnai Hickok, *Digital Sovereignty in the Global South: Norms, Challenges, and Opportunities*, Carnegie Endowment for International Peace, 2022, https://carnegieendowment.org/people/elonnai-hickok (15.03.2026)

[2] Jan Wouters, Jonas Wouters, *Civil Society Participation in Global Governance: The Cases of the United Nations and the European Union*, "Global Policy", Vol. 6, No. 2, 2015, pp. 148-57

[3] Deborah Avant, Oliver Westerwinter, (Eds.), *The New Power Politics: Networks and Transnational Security Governance*, Oxford University Press, Oxford, 2016, pp. 99-122

[4] Sarah Percy, *Mercenaries: The History of a Norm in International Relations*, Oxford University Press, Oxford, 2007, p.167

[5] Sebastian von Einsiedel et al, *Op. cit.,* p. 87

[6] Siba N'Zatioula Grovogui, *Regimes of Sovereignty: International Morality and the African Condition*, University of Chicago Press, 1996, pp. 150-173

Latin America, or the Middle East. The African Union's Ezulwini Consensus and repeated calls from the G4 nations (Germany, Brazil, India, Japan) exemplify the push for expanded membership and regional balance[1]. The veto power is another focal point for reform debates. Critics contend that the P5's ability to block substantive action perpetuates major-power privilege and undermines collective responsibility[2]. Proposals such as the French-Mexican initiative to voluntarily suspend the veto in cases of mass atrocity crimes, or the Accountability, Coherence and Transparency (ACT) Group's "Code of Conduct," seek to limit the most egregious abuses of this privilege[3].

Beyond the Security Council, calls for inclusivity extend to regional organizations and affected populations. Empirical research demonstrates that peace operations and interventions designed in partnership with regional bodies and local stakeholders are more likely to secure buy-in and achieve sustainable outcomes[4].

Strengthening Legal Oversight and Accountability

Legitimacy also depends on credible legal oversight and robust accountability mechanisms. International judicial bodies, such as the International Court of Justice (ICJ) and the International Criminal Court (ICC), play an important but often underutilized role in reviewing the legality of institutional actions and providing redress for violations[5].

Some scholars propose expanding the ICJ's advisory jurisdiction to include questions of Security Council legality, or establishing independent review panels to assess compliance with international humanitarian and human rights law[6]. Within organizations, strengthening internal oversight offices and whistleblower protections, such as the United Nations' Office of Internal Oversight Services (OIOS), can improve transparency and responsiveness[7].

Accountability is also enhanced by fostering a culture of learning from past failures, including external evaluations of peace operations, commissions of inquiry, and public reporting on lessons learned[8].

Engaging Civil Society and Non-State Actors

Civil society organizations (CSOs), advocacy networks, and affected populations are increasingly recognized as vital contributors to institutional legitimacy. Formalizing consultative mechanisms, such as observer status, structured dialogue, and public hearings, helps ensure that diverse voices inform decision-making and hold institutions accountable[9]. For example, the annual Arria-formula meetings of the Security Council invite non-governmental experts and local actors to provide perspectives on pressing security issues, albeit outside formal deliberations[10]. Expanding and institutionalizing these avenues can bridge the legitimacy gap between high-level decision-makers and those most affected by their choices.

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[1] Sebastian von Einsiedel et al, *Op. Cit.,* p. 88

[2] Ian Hurd, *Op. cit.*, pp. 66-71

[3] Security Council Report, *Security Council Vetoes*, https://www.securitycouncilreport.org/atf/cf/%7B65BFCF9B-6D27-4E9C-8CD3-CF6E4FF96FF9%7D/veto_table.pdf (15.03.2026)

[4] Tim Murithi, *Op. cit,* pp. 71-82

[5] *Laurence Boisson de Chazournes, The International Court of Justice and the Security Council: Disentangling Themis from Ares," Columbia Journal of Transnational Law,* Vol. 43, No. 3, 2005, pp. 529-556

[6] Anne Peters, *Op. cit.*, pp. 1026-47

[7] United Nations, *Office of Internal Oversight Services (OIOS)*, https://oios.un.org (15.03.2026)

[8] Lise Morjé Howard, *Op. cit.*, Ch. 8

[9] Jan Wouters and Jonas Wouters, *Op. cit.*, pp.148-57

[10] Security Council Report, *Arria-Formula Meetings*, https://www.securitycouncilreport.org/un-security-council-working-methods/arria-formula-meetings.php (15.03.2026)

Adapting to Digital Governance and Hybrid Threats

As digital technology transforms the nature of security threats, institutions must innovate to remain relevant and legitimate. Policy adaptation may include developing specialized cyber units, updating mandates to address information warfare, and collaborating with multistakeholder initiatives such as the Global Commission on the Stability of Cyberspace[1].

Global South states and civil society actors have called for more inclusive norm-setting in cyberspace governance, warning against the domination of digital rules by a small group of technologically advanced states[2]. Responsive institutions must therefore balance agility with broad-based participation and transparency in shaping new regulatory frameworks. Ultimately, reforms must address both the structural and substantive roots of legitimacy deficits. This includes not only expanding representation and curbing unchecked power but also ensuring that institutions are responsive to the needs, values, and voices of a diverse and interconnected world.[3] The future of global security governance depends on principled adaptation, innovative practice, and the consistent pursuit of justice and accountability.

Discussions

Synthesis of Findings: Integrating Law, Practice, and Perception

The preceding analysis demonstrates that the legitimacy of global security institutions is not a static or one-dimensional attribute, but an evolving construct shaped by legal mandates, procedural arrangements, substantive outcomes, and shifting global norms. While international law provides the foundational authority for bodies such as the United Nations Security Council (UNSC), legal compliance alone has proven insufficient for sustaining legitimacy—especially in cases where procedural fairness or meaningful representation is lacking, or where outcomes diverge from humanitarian and justice-based ideals[4].

Empirical case studies of Kosovo, Libya, and Syria underscore the tension between legality and legitimacy, revealing that both action and inaction can undermine institutional credibility. Kosovo exposed the challenge of balancing moral urgency against formal legal constraints; Libya illustrated the risks of "mandate creep" and the importance of post-intervention accountability; and Syria highlighted the damaging effects of paralysis and selective enforcement rooted in major-power rivalries[5]. Survey data and public opinion research further show that legitimacy is often context-dependent and shaped by the perceptions and participation of affected populations, not just by states or legal experts[6].

Theoretical Implications: Rethinking Legitimacy and Authority

These findings reinforce the need for a multidimensional, dynamic understanding of legitimacy in international relations. Realist, liberal-institutionalist, and constructivist perspectives each capture important facets of the legitimacy puzzle, but none is sufficient alone. [7] The interplay between power and procedure, between legal authorization and moral

[1] Global Commission on the Stability of Cyberspace, *Members and Partners*, https://cyberstability.org/members/(15.03.2026)
[2] Elonnai Hickok, *Digital Sovereignty in the Global South: Norms, Challenges, and Opportunities*, Carnegie Endowment for International Peace, 2022, https://carnegieendowment.org/people/elonnai-hickok (15.03.2026)
[3] Allen Buchanan, Robert O. Keohane, *Op. cit.*, pp. 405–37
[4] Thomas M. Franck, *Op. cit.,* pp. 706–707
[5] Nicholas J. Wheeler*, Op. Cit.,* pp. 283–325; Ian Johnstone, *Op. cit*., pp. 23–27
[6] Alex Oliver, *Op. cit.*, pp. 7–9
[7] Robert O. Keohane, *Op. cit*., Ch. 6

justification, and between global norms and local perceptions, all shape how legitimacy is constructed, challenged, and re-negotiated over time.[1]

As the international system becomes more multipolar and complex, the boundaries of legitimate authority are increasingly contested, not only between states, but also among regional organizations, non-state actors, and civil society groups[2]. The growing importance of cybersecurity, humanitarian intervention, and the digital public sphere further complicates the normative landscape, demanding new frameworks for legal and political accountability.

Practical and Normative Implications: Reform, Accountability, and Participation

The practical implications of these findings are clear: for global security institutions to retain legitimacy and effectiveness, they must pursue reforms that address structural imbalances, procedural deficits, and substantive outcomes. This includes expanding representation within decision-making bodies, limiting or reforming the use of the veto, enhancing legal oversight and accountability mechanisms, and creating structured avenues for the participation of affected populations and civil society. Institutions must also invest in learning from past failures, embracing transparency, and adapting to new threats such as cyber conflict and hybrid warfare. The pursuit of legitimacy in this context is not a one-time achievement but a continuous process that requires responsiveness, innovation, and principled engagement[3].

Scholarly Contribution: Advancing Debates and Future Research

This paper contributes to the scholarly debate by offering a holistic, comparative analysis of legitimacy in global security governance, bridging legal, political, and sociological perspectives. It challenges reductionist accounts that equate legitimacy with legality or state consent, and instead foregrounds the importance of outcomes, inclusivity, and accountability[4].Future research should further explore how institutional reforms are implemented in practice, how digital and regional actors shape evolving legitimacy norms, and how legitimacy is perceived and enacted by populations most affected by security interventions. Comparative studies of successful and failed reform initiatives, as well as empirical research on public participation and trust, will be essential for advancing understanding and improving practice.

Conclusions

This paper has critically examined the relationship between international law and the legitimacy of global security institutions, with a particular focus on the United Nations Security Council, NATO, the African Union, and the Organization for Security and Co-operation in Europe. The analysis has demonstrated that legitimacy is not merely a function of legal authority, but rather a multidimensional construct shaped by legal frameworks, procedural fairness, substantive outcomes, and the perceptions of states and affected populations.

Empirical case studies of Kosovo, Libya, and Syria reveal the complex ways in which legality, morality, and politics interact to shape institutional legitimacy. While legal mandates, such as those provided by the UN Charter, are vital for conferring authority, they are not sufficient in the absence of inclusive decision-making, equitable representation, and a

[1] Allen Buchanan, Robert O. Keohane, *Op.cit.,* pp. 411–412
[2] Sebastian von Einsiedel et al., *Op. cit.*, pp. 5–10
[3] Lise Morjé Howard, *Op.Cit.*, Ch. 8, pp. 199–225
[4] Siba N'Zatioula Grovogui, *Op. cit.,* Ch. 2, pp. 47–70

clear alignment with global values like human rights and justice. Cases of both intervention and inaction highlight the dangers of selective enforcement, power asymmetries, and the exclusion of marginalized voices.

The paper has further argued that new and evolving challenges, such as cyber threats, the proliferation of non-state actors, and growing multipolarity, demand adaptive reforms. These include expanding representation within the Security Council and other bodies, limiting or making the veto more accountable, strengthening legal oversight, and institutionalizing the participation of civil society and affected populations. Only by embracing such reforms can global security institutions retain the legitimacy necessary to secure cooperation, enforce mandates, and contribute meaningfully to international peace and stability. For policymakers and institutional leaders, the findings underscore the urgency of principled adaptation, rooted in both legal tradition and democratic innovation. For scholars, the study advances a holistic framework for understanding legitimacy not as a static attribute, but as an ongoing process of negotiation between law, power, and normative aspiration.

Looking forward, future research should assess the impact of recent and proposed reforms, the role of digital governance and artificial intelligence in security decision-making, and the lived experiences of communities affected by international interventions. As the global order continues to evolve, the legitimacy of security institutions will remain central not only to their effectiveness but to the wider pursuit of a just and sustainable international system.

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