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THE IMPACT OF THE MIXED-MEMBER SYSTEM ON DISPROPORTIONALITY IN ELECTION RESULTS IN POST-COMMUNIST COUNTRIES: HUNGARY, LITHUANIA, UKRAINE AND GEORGIA

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Abstract

The article studies mechanical effects of the mixed-member electoral system on disproportionality – the difference between votes gained by parties and their shares of seats – in four post-communist countries in Europe: Georgia, Hungary, Lithuania, and Ukraine. The article relies on the quantitative analysis of 32 elections, including those held in 2024. The study indicates that the role of the majoritarian component is more significant in increasing the overall level of disproportionality. This in turn, is mostly due to overrepresented seats gained by the winning parties. On the other hand, high level of legal threshold in the PR component raises the level of disproportionality, which is also reflected in a total indicator. In this regard, votes gained by parties that fail to meet the threshold also influence the level of disproportionality. Moreover, the study reveals that the elections held under the linked (compensatory) mixed-member system exhibited lower level of disproportionality than the ones held under the unlinked (parallel) system.

Key words: SMD and PR Components, legal threshold, linked and unlinked systems, disproportionality, wasted votes.

INTRODUCTION

After the collapse of communism in the early 1990s, some post-communist and post-Soviet countries in Central and Eastern Europe adopted mixed electoral

systems for electing their legislative bodies. The rationale supporting this was that it would eliminate the shortcomings of both majoritarian and proportional systems while allowing their advantages to complement each other. However, it is debatable to what extent mixed systems represent “the best of both worlds” [Shugart & Wattenberg 2001]. Some countries that initially opted for a mixed-member system later replaced it with a proportional representation (PR) electoral system (Albania, Armenia, Bulgaria, Croatia, Georgia, and North Macedonia). Currently, among the post-Soviet and post-communist countries of East-Central Europe, a mixed-member electoral system is used to elect the legislative bodies in Hungary, Lithuania, Tajikistan, Russia and Ukraine. Until the last (2024) elections, the Parliament of Georgia was also elected using a mixed system.

A mixed electoral system combines the opposing principles of proportional and majoritarian systems for the election of a single body [Massicotte & Blais 1999: 345]. Under this system, seats should be distributed nominally at one level, and at the second level according to lists [Shugart & Wattenberg 2001:10]. Accordingly, a mixed-member system allows the voter to cast two votes: one for a party list in the PR component and another for a candidate in the corresponding single-member district (SMD) [Moser & Scheiner 2004: 576]. In a mixed system, two main internal types are distinguished based on which primary electoral system it leans towards and whether it compensates for the majoritarian element with party list seats: Mixed-member proportional (MMP) and Mixed-member majoritarian (MMM), also known as parallel, systems. The mixed system used in all post-communist countries is of the parallel type.

The issue of disproportionality resulting from the dominant role of the majoritarian principle in post-communist countries, along with other effects of the mixed system, is a topic of active interest among researchers. According to Gallagher, disproportionality implies the difference between the share of votes a party receives and the share of seats (mandates) it gains. Disproportionality is observed when the share of votes received by parties participating in elections does not exactly correspond to the share of mandates they obtain [Gallagher 2005: 602]. Accordingly, a certain level of disproportionality is observed in virtually all elections. According to Moser and Scheiner [2004], who analyzed mixed-member systems in 24 elections of 13 countries and of two sub-units of a country,¹ the PR and SMD components of mixed electoral systems have independent effects on

¹ Among them, the authors studied ten elections held in post-communist European countries: Armenia (1998), Croatia (1995), Hungary (1990, 1994, 1998), Lithuania (1996), Macedonia (1998), Russia (1993, 1995, 1999), and Ukraine (1998).

disproportionality. The authors further argue that mixed systems with linked components reduce the level of disproportionality compared to those where the majoritarian and proportional elements operate independently [Moser & Scheiner 2004: 586]. Moser and Scheiner identify the legal threshold as a third factor causing disproportionality in mixed-member systems. An early study of the impact of legal threshold on disproportionality is made by Lijphart [1994]. According to the theory, a high level of legal threshold leads to a high level of disproportionality [Moser & Scheiner 2004: 581].

The aim of this study is to examine the impact of mixed electoral systems on the disproportionality of election results in post-communist countries. The research questions are: what impact does the proportional and majoritarian components of a mixed-member system have on the disproportionality of election results, what effect does the size of the legal threshold have on the disproportionality of PR and overall results, and how does the nature of the relationship between the components of a mixed-member system affect the level of disproportionality? In response to these questions, the following hypotheses are proposed:

- H₁:** In mixed-member systems, the majoritarian (SMD) component leads to a higher level of disproportionality than the PR component;
- H₂:** The higher the legal threshold of the PR component, the higher the level of disproportionality;
- H₃:** An unlinked mixed-member electoral system produces a higher level of disproportionality than a linked (compensatory) system.

1. RESEARCH METHODOLOGY AND OPERATIONALIZATION OF VARIABLES

The study examined 31 primary and one repeated elections of the supreme representative bodies held with mixed-member systems in four countries – Georgia, Hungary, Lithuania, and Ukraine, up to and including 2024. These included nine parliamentary elections held in Hungary between 1990–2022 and nine – in Lithuania between 1992–2024. All nine parliamentary elections held between 1990–2020 were studied in the case of Georgia too, except the elections of November 2, 2003, which were partially invalidated by the Supreme Court after the “Rose Revolution”. The repeated elections held on March 28, 2004, which determined only mandates for the proportional system, were analyzed in this component according to the distribution of the seats, and not taking into account the full composition of the parliament. Unlike the countries listed above, Ukraine, as of 2024, has held only five elections based on a mixed-member system (1998, 2002, 2012, 2014, 2019).

Accordingly, this article is limited to examining only these five elections in the case of Ukraine.

The study conducted a quantitative analysis of the official election results. The results recorded by the electoral subjects participating in the elections were gathered from results protocols of the Central Election Commissions (CEC) of Georgia, Hungary, Lithuania, and Ukraine. In some cases, alternative archival databases were used. In some cases, the official percentage distribution of votes in the election results was given not according to the valid votes, but including invalid ballots; in addition, in the 1998 and 2002 elections in Ukraine, voters had option to vote against all candidates on a ballot. The analysis presented in this article is based on weighted data, and in all elections the percentage of votes received by the electoral subjects in total equals 100 %.

In this study, three independent variables were identified: components of the mixed-member system, legal threshold, and the nature of the relationship between majoritarian and proportional components. The first variable considers the rules of voting under the principles of proportional representation and majoritarian (single-member districts). Also, the PR component in the case of a two-tier system (Lithuania, Ukraine, Georgia, Hungary since 2014) takes into account the results of voting in single nationwide or regional multi-member districts. In this article, the PR component of the Hungarian three-tier system of 1990–2010 refers only to the results of the distribution of regional lists. National compensation lists are not considered in a PR component. The stage of compensatory seats was excluded from the PR component as the SMD component, due to its dependence on the results, might have caused error when making a comparison. The second variable, the legal threshold, refers to the minimum percentage of PR votes, as stipulated by law, that parties and pre-electoral coalitions (PECs, electoral blocs) must obtain to qualify for mandates. The third variable, the nature of the connection between the components of a mixed-member system, is determined by whether the electoral system provides for compensation of seats for electoral subjects with a national list. According to Moser and Scheiner [2004], an unlinked system is a non-compensatory mixed-member majoritarian (MMM) system, and a linked system is a mixed-member proportional (MMP) system or the Hungarian model, including the 2010 elections.

The dependent variable in the study is the disproportionality between the share of votes received by electoral subjects and the share of seats they won, which is measured using the Least Square (LSq) Index developed by Michael Gallagher [1991]. The LSq index expresses the overall level of difference between the shares of

votes received by electoral subjects and the shares of seats they obtain and is calculated using the following formula:

$$LSq = \sqrt{\frac{1}{2} \sum_{i=1}^n (s_i - v_i)^2} \quad (1)$$

Where s_i represents the percentage of seats won by candidates from each party/PEC/initiative group participating in the elections, and v_i is the percentage of votes received for each electoral subject ($i=1\dots n$).² The LSq Index is calculated based on the overall election results (LSq_{OV}), as well as based on the PR (LSq_{PR}) and SMD (LSq_{SMD}) components.

In addition to the independent variables, the study also identified two intermediate variables that experience the mechanical effects of the legal threshold in the SMD and the PR components and cause disproportionality. The maximum deviation (MD) index is an intermediate variable between the majoritarian component and the Gallagher disproportionality index, which in this article describes the bonus received by the most overrepresented party/PEC in the SMD component and is calculated by the formula:

$$MD = \text{Max}_{i=1}^n |s_i - v_i| \quad (2)$$

Where s_i is the percentage of seats won by candidates from each party/PEC/initiative group in the SMD component, and v_i is the percentage of votes won for each electoral subject ($i=1\dots n$).

The intermediate variable between the legal threshold and disproportionality is wasted votes (V_{wasted}). This variable was measured by summing the share of votes received by parties and PECs in the PR component that failed to overcome the legal threshold:

$$V_{wasted} = \sum_{i=1}^n v_i \quad (3)$$

Where v_i is the share of votes received by the i party/PEC that cannot overcome the legal threshold, and n is the number of electoral subjects remaining without seats in the PR component.

2. DETERMINANTS OF DISPROPORTIONALITY: A THEORETECAL REVIEW

The range of factors that explain the disproportionality between votes and seats received by electoral subjects is broad in the existing scientific literature on electoral studies. Most of the studies examining disproportionality focus on the types of electoral systems. However, it is also relevant to consider other dimensions

² The minimum value of the LSq index can be 0, which means absolute proportionality, and the maximum value – 100, indicates absolute disproportionality. However, in practice, absolute proportionality or disproportionality is never observed.

of the electoral system that affect disproportionality such as: legal threshold, electoral formula, district magnitude, and effective threshold.

Various authors have shown that the level of disproportionality of election results is higher in majoritarian electoral systems than in proportional ones [Jackson & Rose 1991; Lijphart 1994; Gallagher et al. 1995]. For example, according to Pippa Norris, the largest deviation (winner's bonus) in elections held under the majoritarian system is 12.5 % on average. In mixed electoral systems, this figure is 7.4 % points, while in proportional systems the average deviation is only 5.7 %. Thus, in majoritarian systems, a party that receives more than 37.5 % of the vote can often win a majority in parliament [Norris 1997: 307]. It is worth noting that the presented maximum deviation indicators exhibit disproportionality only in the case of the most overrepresented party and ignore the disproportionality of votes and mandates of other electoral subjects. A better way to compare types of electoral systems is to use the Gallagher LSq index, which takes into account the results of all parties participating in the elections. A study conducted by Lijphart [1994] using this index showed that the disproportionality index in majoritarian systems was 10.9, in proportional systems – 4.4, and in mixed systems – 6.9 [Lijphart 1994, in Gallagher 2005: 546].

As Moser and Scheiner demonstrate, the majoritarian and proportional components of a mixed electoral system, despite being combined into a one electoral system, retain its independent effects. However, this finding applies to countries with developed party systems. These authors also believe that different levels of institutionalization of political parties balance the mechanical effects of a mixed system and can lead to unexpected consequences, such as proliferation of candidates in the SMD tier. According to Moser and Scheiner, the psychological effect of the SMD component is more pronounced in systems that do not offer a compensatory relationship between the majoritarian and proportional tiers. Also, this effect is stronger under conditions of a high ratio of majoritarian to proportional seats and the use of a plural formula [Moser & Scheiner 2004: 590].

Bedock and Sauger showed that in a mixed-member system, the level of party bipolarization limits the rate of disproportionality caused by the majoritarian bonus [Bedock & Sauger 2014, in Bedock 2017: 8–9]. Later, Bedock studied this system again, in France and Italy. She analyzed the correlation between the changing format of the electoral competition and the level of disproportionality. According to Bedock's study, the strengthening of the third axis in tripolar party systems results in an increase in the level of disproportionality [Bedock 2017].

Bochsler, based on a study of six elections in Hungary, concluded that the level of disproportionality in mixed systems depends on the number of compensatory seats

and the fragmentation of the party system [Bochsler 2014, in Bedock 2017: 9]. A similar conclusion was reached by Manow, who studied the German MMP electoral system. As a result of this study, Manow concluded that in SMDs, where many parties with small number of supporters nominate candidates, the PR component of elections can increase disproportionality, since these entities do not have the power to achieve victory [Manow 2011].

In explaining the determinants of disproportionality under PR systems, some researchers focus on the district magnitude – the number of mandates to be allocated in a constituency [Rae 1969; Sartori 1986; Taagepera & Shugart 1989; Jones 1993; Lijphart 1994; Cox 1997; Powel Jr & Vanberg 2000]. In this regard, researchers agree that the district magnitude has a strong effect on the level of disproportionality. A small district also determines a high effective threshold, which is an equivalent limiting factor to the threshold established by law. The latter, in turn, contributes to an increase in the level of disproportionality [Taagepera & Shugart 1989; Lijphart 1994; Powel Jr & Vanberg 2000].

Lijphart also linked district size to the legal threshold. He argued that both factors work equally against small parties and limit their representation [Lijphart 1997]. The impact of the legal threshold on disproportionality in post-communist countries was also demonstrated by Moraski and Loewenberg in a study of 13 elections [Moraski & Loewenberg 1999].

When studying disproportionality under PR systems, some researchers also focus on the impact of the electoral formula. It is worth noting that the existing literature on this issue largely contradicts one another. For example, while Blondel considered the largest remainder method to be the most disproportional formula [Blondel 1969: 191], Loosemore and Hanby named it the most proportional [Loosemore & Hanby 1971, in Lijphart 2003: 171]. However, most researchers agree that under the D'Hondt formula, disproportionality favors large parties, while the largest remainder method is more proportional and favorable to small parties [Van den Bergh 1955; Mackenzie 1958; Lakeman 1974; Berrington 1975; Bon 1978; Nohlen 1978, in Lijphart 2003: 171–172].

3. MAIN RESULTS

3.1. Independent and combined effects of proportional and majoritarian components on disproportionality

Among the four countries studied, the number of seats allocated to the proportional and majoritarian components of the mixed-member system has not changed in

Lithuania since 1992 until the last parliamentary elections. Of the 141 seats in the country's Seimas, 71 are allocated to SMDs, and 70 to single nationwide multi-member district. The specified ratio of SMD and PR seats (225/225) was also symmetrical in all elections held under the mixed electoral system in Ukraine, although all seats in the majoritarian component were filled only in the 2002 and 2012 elections. In 1998, the results of five SMDs were annulled due to irregularities. In 2014 and 2019, elections failed to be held in more than 25 SMDs due to Russia's annexation of the Autonomous Republic of Crimea and the control of pro-Russian separatists in districts in the Luhansk and Donetsk regions.

Unlike Lithuania and Ukraine, both the defined ratio of proportional and majoritarian seats and the overall composition of the legislative body changed in Georgia and Hungary during the studied period. The maximum share of seats in the SMD component was observed in the last three elections of the Hungarian National Assembly (53.27 %), and the minimum share was observed in the 2020 elections of the Georgian Parliament (20 %).

For the 1990 elections to the Supreme Council of Georgia (a legislative body back then), proportional and majoritarian mandates were distributed in equal numbers (125/125), and from 1992 to the 2008 elections, the composition of the Georgian Parliament was calculated with 150 proportional and 85 majoritarian seats, although in reality, instead of 85, the elections were held in only 73–75 SMDs, and the remaining seats remained vacant due to the political context and/or were awarded to members of the Parliament (MP) elected from the territory of Abkhazia in 1992. Based on the results of the referendum of November 2, 2003, the composition of the Georgian Parliament was reduced to 150 from 2008. In these elections, half of the MPs were elected on the basis of the PR system, and the other half on the basis of the majoritarian system. In 2012–2016, 77 MPs were elected under the PR component and 73 under the SMD one. In 2020, 120 seats in the Georgian Parliament were filled from party lists and 30 from single-member districts.

The Hungarian National Assembly consisted of 386 members from 1990 to 2010, elected in three-tier elections. 176 seats were allocated to SMDs; the remaining 210 seats were divided into regional seats from multi-member constituencies and national compensatory seats. The number of mandates allocated to regional and national seats varied. The number of regional seats would increase in size with each subsequent election, while the number of compensatory seats would be reduced. Following amendments to the Hungarian Constitution and the Electoral Code, the National Assembly was reduced to 199 seats from the 2014 elections, with

106 seats allocated to SMDs and 93 seats to the single nationwide multi-member district. In addition, the aggregate national list no longer provides for compensation (see Table 1).

Table 1

Distribution of seats and disproportionality indices in the 32 elections studied

Country	Elections	SMD Component		PR Component		Compensatory Seats		Disproportionality			
		N of Seats ^A	%	N of Seats ^A	%	N	%	LSq _{OV}	LSq _{PR}	LSq _{SMD}	MD ^B
1	2	3	4	5	6	7	8	9	10	11	12
Lithuania	2024	71	50.35	70	49.65	-	-	13.28	9.27	21.87	29.05 (2/1)
	2020	71	50.35	70	49.65	-	-	8.86	8.62	12.89	13.87 (1/1)
	2016	71	50.35	70	49.65	-	-	12.52	8.83	23.29	30.15 (2-1)
	2012	71 (70)	50.35	70	49.65	-	-	8.99	5.53	17.06	16.56 (1-1)
	2008	71	50.35	70	49.65	-	-	11.09	8.42	16.05	18.46 (1-1)
	2004	71	50.35	70	49.65	-	-	5.17	4.40	7.72	5.32 (3-3)
	2000	71	50.35	70	49.65	-	-	7.33	10.52	11.51	10.10 (1/1)
	1996	71 (67)	50.35	70	49.65	-	-	14.99	14.22	20.41	25.57 (1/1)
	1992	71	50.35	70	49.65	-	-	6.22	7.02	13.20	17.13 (1/1)
Georgia	2020	30	20	120	80	-	-	8.72	2.62	40.45	50.21 (1/1)
	2016	73	48.67	77	51.33	-	-	21.46	10.05	40.76	50.7 (1/1)
	2012	73	48.67	77	51.33	-	-	2.99	2.92	3.27	2.91 (1/1)
	2008	75	50	75	50	-	-	15.63	4.77	26.34	33.09 (1/1)
	2004	-	-	150	-	-	-	-	15.66	-	-
	1999	85 (73)	36.17	150	63.83	-	-	11.99	12.20	22.3	28.67 (1/1)
	1995	85 (75)	36.17	150 (146)	63.83	-	-	19.72	29.35	ND ^c	ND ^c
	1992	85 (75)	36.17	150	63.83	-	-	4.52	3.62	ND ^c	ND ^c
	1990	125 (121)	50	125	50	-	-	8.13	9.74	ND ^c	ND ^c

The End of the Table1

1	2	3	4	5	6	7	8	9	10	11	12
Ukraine	2019	225 (199)	50	225	50	-	-	21.84	10.62	25.10	32.46 (1/1)
	2014	225 (198)	50	225	50	-	-	9.27	9.27	17.87	13.03 (2/1)
	2012	225	50	225	50	-	-	10.31	2.90	20.81	21.36 (1/1)
	2002	225	50	225	50	-	-	12.26	7.42	12.21	13.37 (1/1)
	1998	225 (220)	50	225	50	-	-	4.50	9.53	15.18	1.37 (9/4)
Hungary	2022	106	53.27	93	46.73	-	-	11.00	5.50	25.15	29.28 (1/1)
	2018	106	53.27	93	46.73	-	-	13.61	6.84	31.52	37.95 (1/1)
	2014	106	53.27	93	46.73	-	-	17.42	5.85	38.11	46.46 (1/1)
	2010	176	45.60	146	37.82	64	16.5 8	11.97	6.06	36.53	44.32 (1/1)
	2006	176	45.60	146	37.82	64	16.5 8	4.37	6.69	12.09	15.38 (2/1)
	2002	176	45.60	140	36.27	70	18.1 3	7.56	8.51	12.18	14.58 (2/1)
	1998	176	45.60	128	33.16	82	21.2 4	8.51	10.16	20.73	25.14 (2/1)
	1994	176	45.60	125	32.28	85	22.0 2	16.13	8.52	39.96	53.36 (1/1)
	1990	176	45.60	120	31.09	90	23.3 2	13.87	9.37	30.54	40.87 (1/1)

A note: A) The number of seats determined by the constitution/law. In cases where fewer seats were filled as a result of the elections, the corresponding number is given in brackets; B) Maximum Deviation in SMD component - the first number in brackets reflects the party/PEC's position according to the number of votes in the majoritarian component, and the second number reflects its position according to the seats won in single-member districts; C) No data.

Source: Author's calculation according to results protocols of election.

According to the overall results of the disproportionality of the 31 elections studied, the average level of the Gallagher SLq index was higher in Georgia, Hungary, and Ukraine. In Lithuania, the disproportionality between the votes and seats received by political parties and PECs was relatively low (see Table 2). The most disproportionate were the 2019 elections to the Rada of Ukraine and the 2016 elections to the Parliament of Georgia. The LSq index exceeded 20 in both cases (see Table 1).

Table 2

Average disproportionality rates in the countries studied

Country	LSq _{ov}		LSq _{PR}		LSq _{SMD}	
	Arithmetic Mean	Standard Deviation	Arithmetic Mean	Standard Deviation	Arithmetic Mean	Standard Deviation
Georgia	11.65	6.37	10.10	8.05	26.62	13.82
Ukraine	11.64	5.71	7.95	2.73	18.23	4.46
Hungary	11.60	3.98	7.50	1.58	27.42	9.99
Lithuania	9.83	3.16	8.54	2.69	16.00	4.88

Source: Author's calculation according to results protocols of election.

The lowest overall level of disproportionality was recorded in the 2012 Georgian parliamentary elections (2.99). This election is a special case among the study objects. The disproportionality index of the SMD component in this case was 3.27, which is only 0.35 higher than the LSq index in the PR component. Both votes and seats were distributed between the two electoral subjects with a relatively high degree of proportionality. The difference between the share of majoritarian seats occupied by the first-place PEC Georgian Dream and the percentage of votes received by its candidates was less than 3 %. All other seats were won by the second-place party, the United National Movement. Thus, in this election, as Bedock and Sauger [2014] previously showed, a high level of bipolarization became a determinant of a low level of disproportionality.

In other cases, the study of election results has shown that the levels of disproportionality differ significantly in the proportional and majoritarian components of a mixed system. The full disproportionality index primarily serves as an intermediate indicator between the two. The average index of disproportionality of the full election results in the countries studied was 11.10. While the average level of the LSq index in the PR component was 8.59, in the SMD component it reached 21.97.

The dominant role of the majoritarian component in determining the level of complete disproportionality of the mixed-member system is indicated by the Pearson correlation coefficient. In case of the majoritarian component, it is equal to 0.71, which indicates a strong linear positive relationship between them. In the PR component, the Pearson correlation level (0.46) does not express a linear relationship. In addition, a strong linear positive relationship with the level of disproportionality of the election results in Lithuania is manifested not only in the SMD component (0.90), but also in the PR tier (0.71).

The level of disproportionality of the SMD component reached a particularly high level in Georgia and Hungary. The highest level of disproportionality in this component was observed in the 2016 and 2020 elections in Georgia. In both cases, the LSq index exceeded 40 (besides, the significantly reduced share of seats in the SMD component by 2020, together with the low threshold in the PR tier, significantly limited the component's impact on the overall level of disproportionality of the elections. While the LSq index of disproportionality in the 2016 elections reached 21.46, by 2020 it had decreased to 8.72). It is also worth noting the Hungarian elections of 1990, 1994, 2010, 2014 and 2018, when the LSq_{SMD} index fluctuated between 30.54 (1990) and 39.96 (1994). The main influence on the high level of disproportionality in all these elections came from the high level of difference between the share of votes received by the winning party/PEC in SMDs and the share of majoritarian seats they got. The maximum deviation index in these cases ranged from 33.09 % to 53.36 %, while the share of seats occupied by the parties/PECs who took the first place in terms of obtained mandates in the majoritarian component varied between 64.77 % and 100 %.

In the 2016 parliamentary elections in Georgia, the Georgian Dream party won 71 (97.26 %) of the 73 SMDs. At the same time, the number of votes received by the party's candidates in single-member districts in the first round of the elections amounted to only 46.56 %. A high level of disproportionality (26.34) was also revealed in the majoritarian component of the 2008 parliamentary elections in Georgia. In the 2008 elections, the United National Movement won 71 (94.67 %) of the 75 seats to be distributed in SMDs, although its candidates received 61.58 % of the total votes. It is noteworthy that in both elections, the winning parties gained a constitutional majority in parliament, which they achieved precisely at the expense of the SMD component.

Similar to the 2008 and 2016 elections in Georgia, the winning electoral subject independently obtained a constitutional majority (2/3) in the 2010, 2014 and 2018 Hungarian elections, which was made possible by occupying an extremely high share of the seats allocated for SMDs. The PEC of the Hungarian Civic Alliance (Fidesz) and the Christian Democratic People's Party (KDNP) occupied 97.72 % of the total seats in the SMD component of the elections in 2010, 90.57 % in 2014 and 85.85 % in 2018. In all three cases, the share of majoritarian seats obtained significantly differed from the level of voter support. In 2010, the winning PEC candidates received 53.4 % of the vote, while in the next two elections the share of votes received in the first round by Fidesz and KDNP candidates was below 50 %.

It is worth noting that in some cases, the parties/PECs that came first in the majoritarian component did not win the most extra seats. For example, in the 2016 and 2024 Lithuanian Seimas elections, the parties that came second in the SMD vote won the most single-member districts. A similar result was observed in the 1998, 2002, and 2006 Hungarian National Assembly elections and the 2014 Ukrainian Rada elections. In the 2004 Lithuanian elections, the party that came third in the majoritarian component received the largest bonus, both in terms of votes and seats. In the 1998 Ukrainian elections, all major parties received smaller proportion of seats than the votes they received in the SMDs. The largest bonus, however, was received by independent candidates. They received 47.73 % of the SMD seats and 23.6 % of the mandates distributed based on both components.

Compared to Georgia and Hungary, the average level of disproportionality of the majoritarian component is lower in Lithuania and Ukraine. The LSq_{SMD} index for nine elections in Lithuania varied between 7.72 (2004) and 23.29 (2016). Among the five elections in Ukraine held under a mixed-member system, the maximum level of disproportionality of the majoritarian component reached 25.10 (2019), and the lowest level was 12.21 (2002). It is noteworthy that the most recent elections in both countries show a significant increase in the level of disproportionality in favor of the winning parties. In the 2019 Ukrainian Rada elections, the Servant of the People party received 43.16 % of the PR votes and 32.87 % of the majoritarian component votes, although it represented 65 % of the winning candidates in SMDs. In Lithuania, despite the fact that the Social Democratic Party received less than 20 % of the votes in the 2024 elections, its candidates won 48 % of the single-member districts.

A special case is the 1995 parliamentary elections of Georgia, which are distinguished by a record high level of disproportionality of the proportional component (29.35). The PR tier played a major role in determining the disproportionality of the results of these elections. While 53 parties and PECs participated in the elections, only three electoral subjects managed to overcome the legal threshold. In total, they received only 38.5 % of the votes. The votes of the majority of voters who turned out were wasted. These votes went to those parties and PECs that received less than 5 % of the votes, independently. Conversely, some electoral subjects that could not overcome the threshold in the PR component managed to win mandates in the majoritarian one.

3.2. The impact of the legal threshold on the proportional component and overall disproportionality

In all four countries studied, the first elections held under a mixed-member system set a legal threshold of 4 % for electoral subjects to receive seats. After the first elections, differentiated thresholds were introduced in Hungary and Lithuania, which have not changed to this day. In particular, in Hungary, since 1994, the legal threshold has been 5 % for political parties, 10 % for two-party PECs, and 15 % for PECs consisting of three or more parties. Like in Hungary, a 5 % threshold has been set for parties in Lithuania since 1996, although for PECs it is 7 %, regardless of the number of parties included. After the return of the mixed electoral system in 2012, the legal threshold in Ukraine was increased to 5 %, and at the same time, the creation of PECs was prohibited. The dynamics of the electoral threshold in Georgia are significantly different from other countries, having changed 5 times between 1990 and 2020. It is noteworthy that among the 32 elections studied, both the highest (7 %) and the lowest (1 %) threshold were used in the elections held in Georgia³.

Examining the results of 32 elections by legal threshold enables us to analyze its role in contributing to disproportionality. The direct effect of the legal threshold concerns the PR component, although it also affects the overall disproportionality of the elections.

Under the lowest legal thresholds of 1 and 2 percent, the Gallagher index for the 2020 and 1992 parliamentary elections in Georgia was 2.62 and 3.62, respectively. The relatively low level of disproportionality of the results of the PR component was also reflected in the overall indicator of the system.

With the 4 % legal threshold in place, the level of disproportionality reached a higher level. According to the results of the PR component of the five elections in all four countries, it varies between 6.64 and 14.38. The average level is 8.62. The lowest level of disproportionality under the 4 % threshold was observed in the 1992 elections to the Lithuanian Seimas. It is worth noting that the reduction in the level of disproportionality in these elections was also influenced by the fact that the 4 % legal threshold did not apply to the lists of ethnic minorities. For minority parties,

³ In the 1992 elections, parties and PECs had to pass a 2 % threshold in each multi-member district. In 1995, a 5 % threshold was set for a single nationwide multi-member district. By 1999, the threshold increased to 7 %, and remained so until 2004. These two elections were held with the highest threshold among the 32 elections studied. Since 2008, parties and PECs had to pass a 5 % threshold to enter the Parliament of Georgia. For 2020, as a one time thing, the threshold was set at 1 % for political parties and in the case of PECs, this level was equal to the product of the number of parties in them.

collecting 2 % of the vote was enough for entering the legislative body. As a result, the Association of Poles in Lithuania, which received 2.14 % of the votes, was able to enter the Seimas, unlike national parties with less than 4 % support. The maximum level of the LSq_{PR} index (14.38) under this threshold was recorded in the 1990 Hungarian elections, which was a result of post-communist party fragmentation. The level of support of the parties remaining below the threshold was higher in this election than in any other Hungarian election.

A higher average level of disproportionality is observed under the 5 % legal threshold than under the lower threshold (see Table 3). In addition, the average standard deviation of disproportionality under the 5 % threshold significantly exceeds the corresponding indicator under the thresholds of other levels. The levels of disproportionality show the highest volatility in Georgia. The average standard deviation of the LSq_{PR} index in Georgia is 8.05, while in the other studied countries, it does not exceed 2.73.

Table 3

Average LSq index of disproportionality by legal threshold levels

Legal threshold	Elections	LSq _{PR} average	LSq _{OV} average	Wasted votes (average)
1 % for parties; for PECs – 1 % multiplied by the number of participating parties	Georgia 2020	2.62	8.72	6.13 %
2 %	Georgia 1992	3.62	4.52	3.00 %
4 %	Georgia 1990; Hungary 1990; Lithuania 1992; Ukraine 1998, 2002	8.62	9.00	16.78 %
5 %	Georgia 1995, 2008, 2012, 2016; Ukraine 2012, 2014, 2019	9.98	14.46	19.61 %
5 % for parties; 7 % for PECs	Lithuania 1996, 2000, 2004, 2008, 2012, 2016, 2020, 2024	8.73	10.28	19.94 %
5 % for parties; 10 % for two-party PECs; 15 % for three and more party PECs	Hungary 1994, 1998, 2002, 2006, 2010, 2014, 2018, 2022	7.27	11.32	7.46 %
7 % ^a	Georgia 1999, 2004	13.93	11.99	22.20 %

A note: a) The results of the 2004 repeated elections to the Parliament of Georgia do not reflect the full results of the distribution of seats in Parliament.

Source: Author's calculations based on the results protocols of the elections.

In the 1995 Georgian parliamentary elections, held under a 5 % legal threshold, the LSq_{PR} index of disproportionality reached a record high of 29.35. This level of disproportionality is twice as high as the average disproportionality index (13.93) of the proportional component of elections held under the highest threshold (7 %). In these elections, the parties and PECs registered in the single nationwide multi-member district that failed to pass the 5 % threshold received a total of 55.62 % of the votes cast. Among them, five electoral subjects managed to receive more than 3 % of the votes. The extremely high level of party fragmentation, which contributed to the increase in disproportionality, was influenced by the low legal threshold in the previous, 1992, elections. The 2.5-fold increase in the threshold was also reflected in a sharp increase in disproportionality.

After the 1992 Lithuanian Seimas elections, when the threshold for parties was raised to 5 % and for PECs to 7 %, the disproportionality index of the proportional component of the results in the first elections held under the new legal threshold (1996) doubled. The overall level of disproportionality increased even more. Compared to the previous elections, the total share of votes received by parties below the threshold increased fourfold in 1996. The initial effect of the increase in the threshold was a tendency to decrease disproportionality and support for parties below the threshold in subsequent elections.

The introduction of a differentiated threshold did not have a direct mechanical effect on the above-described trend observed in Lithuania after the 1992 elections. Among the eight elections held in 1996–2024, there was only one case when a PEC that received more than 5 % of the vote fell below the 7 % threshold (in the 2016 elections, the Anti-Corruption Coalition, consisting of the Lithuanian Centre Party and the Latvian Pensioners' Party, received only 6.32 % of the vote and failed to win any seats in the PR component). However, it must be assumed that the differentiated threshold had a psychological effect on the strategy of political parties too, stopping them from forming PECs.

Unlike Lithuania, raising the legal threshold did not lead to an increase in the level of disproportionality of the PR component and the number of votes received by parties/PECs remaining below the threshold in Hungary. Moreover, both indicators decreased compared to the level of 1990. The trend of decrease or stabilization continued in all subsequent elections. The number of wasted votes was the smallest in 2006–2014 and did not exceed 3–4 percent.

Under the 7 % threshold, the average level of disproportionality reached its highest level in the 1999 (PR component) and 2004 elections in Georgia. The LSq_{PR} index

recorded in these two elections, among the 32 election results from the four countries, is only behind the corresponding indicator for the 1995 parliamentary elections in Georgia. The share of votes received by parties remaining below the threshold was also high (see Table 3).

The results indicate that as the legal threshold rises from 2 % to 5 %, the disproportionality index increases significantly. When the legal threshold reaches 7 percent, the LSq index of the proportional component reaches its maximum. In addition, the results reveal a lower average disproportionality of the differentiated threshold in the PR component than in the case of a uniform threshold of 5 percent, which may be determined by the local context of the countries and the level of institutionalization of the party system.

3.3. The influence of the connection between the components of a mixed-member system on the level of disproportionality

The mixed electoral systems in the countries studied are divided into two subtypes - unlinked and linked systems. In Lithuania, Ukraine and, until 2016, Georgia, seats obtained from the proportional and majoritarian components of the elections were distributed independently of each other. This system is also referred to as a mixed-member majoritarian (MMM) (Shugart & Wattenberg, 2003, pp. 13–17), a non-compensatory system. In 1990-2010, a linked mixed system was used to elect the National Assembly of Hungary. The third component of the three-tier system used a national compensatory list, where the distribution of mandates depended on the distribution of seats in the SMD component. Deviations from the share of seats distributed in the PR component were subject to partial compensation. The Hungarian electoral system model of the given period is also classified as Supermixed (SM) (Massicotte & Blais, 1999, p. 357) or MMM system with party compensation (Shugart & Wattenberg, 2003, p. 15). Since 2014, elections of the legislative body in Hungary have also been held under an unlinked system.

In the first 6 elections in Hungary, which were held using a linked (compensatory) system, the Gallagher disproportionality index was 10.40. In the case of the unlinked system (2014, 2018, 2022), the average disproportionality index reached 14.01 (see Table 1). If we add the results of 22 elections held in other countries to the 2014, 2018 and 2022 Hungarian National Assembly elections, which were held using an unlinked (non-compensatory) system, the difference narrows, although the average level of disproportionality in the unlinked systems still remains higher (11.27) than in the case of the 6 linked elections in Hungary (10.40).

For the 2020 parliamentary elections in Georgia, a special rule was introduced that set limitations on the disproportionality of votes and seats for political unions participating in the elections. However, unlike the Hungarian model, it did not significantly change the distribution of mandates. According to this rule, the share of seats received by an electoral subject in total, compared to the share of votes received by it through the party list, should not increase by more than one quarter of these votes. In this case, the electoral subjects should be deprived of their seats and the respective mandates should be assigned to other entities that had overcome the legal threshold. In accordance with this rule, the Georgian Dream party, which took all 30 seats in the SMD component, was deprived of one seat in the PR component and given to the electoral subject that came in second place (United National Movement – United Opposition “Strength in Unity”).

CONCLUSION

The results of the study show that in post-communist countries with mixed electoral systems, the disproportionality of election results is affected by both the majoritarian and proportional components. However, as expected, the level of disproportionality in the SMD component is generally significantly higher than in the PR component, while the overall level typically falls between these two indicators.

The analysis of the SMD component revealed that the greater the difference increases between the majority seats obtained and votes received by the party or PEC that took the first place in elections, the greater the disproportionality level of the majoritarian component grows. The latter, in turn, is the main determinant of the disproportionality of the overall results.

The study confirmed the determining role of the legal threshold in disproportionality in the PR component. In addition, a sharp increase in the legal threshold between two elections also led to a significant increase in disproportionality. It is also worth noting that when we have differentiated legal thresholds, the difference in disproportionality levels is less noticeable in cases when the difference between the threshold levels is only one unit. In addition, the results show that setting a higher threshold for PECs did not lead to an increase in disproportionality. However, it could have had a psychological impact on the process of determining the strategy of political parties.

Among the countries studied, Georgia and Hungary showed more common characteristics in terms of the level of disproportionality of election results. The high

level of disproportionality of the SMD component is particularly noteworthy. The impact of the majoritarian tier on the overall disproportionality of election results in Hungary in 1990–2010 was being reduced by the compensation system. After its abolition and the increase in the share of seats of the majoritarian component, the overall disproportionality reached even higher level.

The electoral system in the countries studied was particularly beneficial for the winning political unions. Especially if the difference in voter support for the parties/PECs that came in first and second place reached a significant difference. Georgia and Hungary again stand out in this regard, where the winning electoral subjects even independently gathered a constitutional majority. A completely different result is observed in Lithuania, where the parties that came in first place independently, in many cases, are unable to even gain a majority in the legislative body. In Ukraine, the share of seats occupied by independent candidates is still quite high, which is similar to the trend in Georgia in the last decade of the 20th century.

Despite the fact that the countries studied had almost the same electoral system, a common communist past and more or less common characteristics of post-communist transformations, the problem of disproportionality manifested itself in different ways. Moreover, sometimes in some cases of one country, significantly different disproportionality rates were observed in different elections, which indicates the versatility of the conditions for the influence of the mixed electoral system. In post-communist countries, this system led to different results under different conditions, but one thing is clear in all cases: in these countries, the mixed electoral system was mainly inclined towards majoritarianism and showed a much higher level of disproportionality than it could be in a proportional representation system.

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REALITY SHOW AND ITS ADAPTATION IN SLOVAK TELEVISION PRODUCTION

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Abstract

Globalisation processes are discussed especially in connection with audiovisual production in North America. Slovak television production is heavily influenced by products originating from the United States as well. The main aim of the present study is to clarify the globalisation tendencies of the media industry with regard to television production in post-communist countries, specifically in Slovakia. The research focuses on the sub-genre of reality TV called *container reality game show*, which is currently perceived as a globally popular media phenomenon. To fulfil the primary purpose of the study, it is necessary to clarify the key terms, describe the essence of reality TV and its basic characteristics. The follow-up case study offers an assessment of the globalisation processes resonating in contemporary Slovak television production, specifically in reality TV products. We work with the assumption that the foreign globalised theme and its adaptation in the form of a

glocalised title are qualitatively more or less identical, but that there are always several content changes in the domestic title that reflect the local interests, attitudes, and habits of the respective media audiences.

Key words: container reality game show, globalisation, glocalisation, media industry, reality shows, Slovak television production, television industry.

INTRODUCTION

Globalisation, defined as the creation of numerous international connections merging various services and goods related to all areas of human life, is significant in the economic, political, socio-cultural spheres as well as in the media. The purpose of the present study on Slovak television industry is to assess the globalisation tendencies resonating in it. We work with the fact that Slovak television production is significantly influenced and determined by North American production. The latter has long maintained its dominant influence [see, e.g., Radošinská 2014; Rivkin 2020; Prostináková Hossová & Rusňáková 2022; Filmed Entertainment and Streaming Sector 2023] expressed through a range of globally popular audiovisual works of (not only) an episodic nature. The importance of the issue under study lies precisely in the reflection on the ways in which Slovakia, as a post-communist country, works with globalised themes and modifies them into their glocalised versions. Looking at the otherwise controversial sub-genre of reality TV called reality shows further emphasises the topicality of the problem addressed in the environment of Slovak television production, which is perceived as conservative in comparison to North American media production (given the current social, cultural, and political situation in Slovakia).

The globalisation tendencies of the American television industry are clearly identifiable in several television genres preferred in Slovakia, including reality TV genres – amongst them reality shows, which, due to their ability to achieve stable viewership and appeal to the ever-changing preferences of media audiences, become a suitable object for our investigation. Therefore, the main aim of the present study is to clarify the globalisation tendencies of the television industry, specifically in relation to the reality TV genre and its sub-genre of “container” (dating) reality game shows. It is also noteworthy to observe how the given media content is glocalised or adapted to the preferences of the domestic (Slovak) audience and the socio-cultural and media conditions in the country. This is original research aimed at clarifying the ways of adapting a selected reality show in terms of Slovak television production.

The associated sub-objective of the study is to familiarise the reader with the theoretical essence of the addressed problem by defining the relevant terminology (the terms globalisation, glocalisation, media industry, television industry, reality TV, reality show, container (dating) reality game show) and the characteristic structural-globalisation processes. While elaborating the theoretical part of the study, we primarily focus on knowledge from the fields of media and communication studies and cultural studies, media sociology, and several associated scientific disciplines. This theoretical reflection allows us to conduct a follow-up qualitative content analysis; a case study involving specific research material. We discuss a foreign television format, specifically the “container” reality game show *The Bachelor* [Graebner et al. 2002], the concept of which has been modified and used successfully in several countries around the world, including Slovakia. In the Slovak Republic, the format has been glocalised and adapted to the domestic context through the reality TV product entitled *Ruža pre nevestu* [*A Rose for the Bride*] [Alchus et al. 2023]. We assume that the foreign (North American) globalised theme of looking for love (a life partner) and its glocalised (Slovak) adaptation are qualitatively similar. However, the domestic version contains several content changes reflecting the social, cultural and media conditions of the country and the expectations of Slovak media audiences.

1. REALITY TV AS AN ENVIRONMENT REFLECTING MULTIPLE GLOBALISATION PROCESSES

Globalisation processes are primarily defined as economic processes and secondarily as political, social, and cultural processes. In all cases, globalisation refers in its etymology to the term *global*, which means *the whole, the totality, the total*. The rapid expansion of globalisation is linked to the development and subsequent spread of information and communication technologies, which also means that the globalisation processes were, at first, seriously discussed only in relation to media technologies [see, e.g., Pravdová & Volková 2016; Radošinská et al. 2020]. Globalisation of the media is nowadays characterised by mass consumption of media products and (multi)media communication or other means of disseminating services and goods produced by media conglomerates. Globalised *media industries* are emerging, seen by many as the most progressive and highly profitable business sectors producing a variety of easily commodifiable goods and services. It is also important to mention that the media industries offer interesting content able to satisfy the natural human need to be entertained, which is why entertainment has become the driving force of the commercialisation of the media

industries, and entertainment is usually seen as the main feature of media content [see, e.g., Moravčíková 2013; Radošinská et al. 2020; Radošinská et al. 2022; Rusňáková & Prostináková Hossová 2022]. At the same time, globalisation is also associated with the spread of consumerism and the Americanisation of society and culture. In general terms, we can say that globalisation of the media refers to the efforts of (mostly) North American multinational corporations to spread media content (goods and services), and thus ideas, thoughts, values, or aesthetic schemes, around the world. This is why we consider these corporations to be the obvious initiators of social change not only at the international level, but also at the local, regional, or national levels.

Glocalisation is one of the major strategies global media corporations utilise to promote the idea that the local is not in opposition to the global, because what is perceived as local is, in fact, an integral part of the global [Robertson 1995]. The etymology of the word in question (*globalisation* – *global* and *localisation* – *local*), understood in the context of the media industry's operation schemes, suggests that this is a process initiated by media conglomerates. Their ambition is to penetrate local markets with their media content – goods or services – and adapt them to the conditions of a given country. The establishment of local branches employing domestic media professionals and content creators, marketing of universal but easily adaptable media content and other glocalisation strategies are identifiable in all sectors of the contemporary media industry. The television industry, with its formats and genres, is an ideal example of the massive export and domestication of media (television) content to adapt it to the national environment (e.g., by casting local protagonists, making partial or significant changes to the original script, etc.). In this context, the television industry can be characterised as one of the media industries shaped by several important structural changes and globalisation and glocalisation processes [Višňovský et al. 2022].

Reality shows are the most commonly globalised and glocalised television products. The term in question is widely debated within the professional public and amongst the audiences because it is often used in a broader sense (as synonymous with *reality TV*). Thus, many understand the expression as an umbrella term defining the entire genre group. However, in a narrower (and academically relevant) sense, reality show is a specific sub-genre of reality TV which is typically based on either the acting aspect and the so-called container environment, or centred on talent-seeking shows [see, e.g., Mikuláš 2011; Radošinská 2017; Hudíková & Pravdová 2022]. In the present study, we view reality shows as a sub-genre of reality TV where any

informational value is overshadowed by spectacular presentation and the entertainment imperative [Kunczik 1995]. It is a television show portraying a series of artificially created, staged situations and environments, in which the actions and usually authentic (genuine) reactions of ordinary people – the performers – are displayed. The competitors or performers are selected for the show most often based on auditions, and their task is to behave “naturally” in “artificially designed” conditions.

There are several categorisations of genres and sub-genres associated with reality TV. However, we believe that the conditions of the Slovak media environment and the national television market are currently best suited to the division of reality TV into four basic genres [see, e.g., Dovey 2000; Bondebjerg 2002; Kilborn 2003; Mikuláš 2011; Moravčíková 2013; Moravčíková & Radošínská 2018], namely:

1. *Reality-magazine* – it is dominated by authentic footage, i.e., by reality captured by the camera. The product involves a real storyline that has been filmed accidentally or deliberately, for example, by a person witnessing to the event or by a professional crew, most often by the emergency services, see *Cops* [Langley & Babour 1989] and *112* [Šesták 2006]. Other Slovak television products following this model are *Rodinné prípady* [*Family Cases*] [Zavarský 2012] and *Policajti v akcii – škandalózne prípady* [*Cops in Action – Scandalous Cases*] [Roháč et al. 2016] are merely hybrids of modern television genres that only seem to present truth and reality. The performers (whether we are talking about witnesses or professional cast members) are, in this case, actresses and actors involved in staged situations based mostly on real events that take place in everyday socio-cultural reality.
2. *Docu-soap* – records situations in documentary form and processes them as a soap opera. Docu-soap usually does not follow a specific plot; it depicts a story of people who are connected by a certain environment and explains the development of their relationships. The episodes build on each other, featuring non-actresses and non-actors, i.e., “ordinary people” in their natural environment. The audience – unlike the characters in a reality-magazine – can develop a certain relationship with the characters presented. This product offers a relatively high degree of reality portrayal as it tries to capture the course of everyday life of selected individuals, most often “celebrities”, see *Keeping Up with the Kardashians* [Seacrest 2007] or *Mojsejovci* [*The Mojsejs*] [Minařík & Lachovic 2005].
3. *Reality show, or reality game show* – the goal of the participants in this kind of television show is to win and get a reward, while its course is continuously

monitored by cameras and/or other recording devices, e.g., by the virtual person Lana in the globalised format *Too Hot to Handle* [Gibson & Bennett 2020] or the artificial intelligence called Alice in the thirteenth season of the reality game show *Farma [The Farm]* [Kodoň 2011]. Based on specific rules, the contestants are gradually eliminated; the situations are presented as authentic, although they are stylised, guided by a pre-prepared scenario, and supplemented by moderator inputs. The most important aspect of a reality game show is the fact that the actresses and actors are mostly isolated in a specific location under the constant supervision of advanced technology, which is why this sub-genre of reality TV is often associated with the term *container reality game show* – see *Big Brother* [Wollman 2000] and *VyVolení [The Chosen Ones]* [Eibner 2005]. An interesting type of the container reality game show is the so-called *dating show*, the main goal of which is – in contrast to winning the cash prize in the aforementioned TV shows – to find a partner for whose favour and affection the participants are actively competing, e.g., *The Bachelor* [Graebner et al. 2002] and *Ruža pre nevestu [A Rose for the Bride]* [Alchus et al. 2023]. Apart from borderline situations and plots, scenes with sexual overtones or other presentations characterised by the ability to shock and push the boundaries of human dignity are considered the most attractive for the audience. The considerable interest in the intimacies of others and the direct references to the principles of media voyeurism and exhibitionism are the reasons why this format can achieve such a high viewership not only in Slovakia but also abroad, despite the sub-genre's significant criticism, in particular from the professional public.

4. *Reality series* bears the characteristics of a social experiment and an observational documentary. Its common attributes are the search for borderline situations, the use of moderator “voice-over” or application of sensory technologies. The reality series casts actresses and actors who mostly live in critical social conditions, need money and are willing to endure and cope with almost anything in the show. It is a kind of “social probe” into the lives of ordinary people, processed into the form of a reality series, see *Wife Swap: USA* [Schwab & Lee 2004] and *Zámena manželiek [Wife Swap]* [Pazderová 2004].

In addition to the categories mentioned above, there are other sub-genres of reality TV that have gradually been formed through the hybridisation of other audiovisual content. For example, a recent trend is to involve celebrities in the creation of such

TV projects, resulting in several variations of *competition shows* (e.g., *Survivor* [Parsons et al. 2000] and *Survivor Česko & Slovensko* [*Survivor Czech & Slovakia*] [Orlík 2022]), *singing, dancing and other talent or knowledge shows* (e.g., *Sing Your Face Off* [Hurford-Jones 2014]; *Tvoja tvár znie povedome* [*Your Face Sounds Familiar*] [Majeský 2016]; *Dancing with the Stars* [Rudzinski & Heyes 2005]; *Let's Dance* [Núñez 2006] or *Milujem Slovensko* [*I Love Slovakia*] [Koleková et al. 2013]), but we also record many *adventure-competition entertainment shows* created directly for celebrities and their presentation (e.g., *I'm a Celebrity... Get Me Out of Here* [Cowles et al. 2002]; *Pevnosť Boyard* [*Fort Boyard*] [Šesták 1998]), or other projects. When trying to categorise the sub-genres of reality TV, it is necessary to mention their division according to their thematic focus. In this regard, we recognise, for example, the *makeover* – aiming to capture the visual transformation of a person or object (e.g., *Extreme Weight Loss* [Whitaker 2011] or *O 10 rokov mladší* [*10 Years Younger*] [Pazderová 2017]), *lifestyle show* – focusing on the lifestyle of the performers (e.g., *Nákupné maniačky* [*Shopping Maniacs*] [Eibner 2013]), *culinary show* – showcasing the culinary skills and abilities of the participants (e.g., *Iron Chef USA/America* [Marks 2005]; *Bez servítky* [*Without a Napkin*] [Eibner 2021] or *Na nože* [*Knives Out*] [Lamošová & Šulc 2023]), *mockumentaries* – a kind of “fake documentary” depicting fictitious events, characterised by irony, satire or parody (e.g., *De Grote Donnor Show* [Endemol 2007] and *Beyond the Pole* [Williams et al. 2009]), etc. Again, we note that there is currently an intermingling of different sub-genres of reality TV. This means that the range of TV programmes associated with this genre group can be – and often is – complemented by multiple “genre hybrids” (e.g., celebrity lifestyle docu-soap products). Commenting on the process of genre hybridisation and the inconsistent classification of reality TV sub-genres, Koščo [1984] speaks of an ever-evolving genre system that needs to be continuously examined, considering all the changes taking place in the television industry and its programming structure.

The audience's belief that they are watching real events unfold in real time on reality TV and capturing authentic people adds to the appeal of all sub-genres of reality TV. The creators of this content are aware of the wide popularity of their work and therefore invest a lot of money in promoting these products. They use practices that have been successful in the past, either trying to globalise the content or producing glocalised versions of successful foreign projects, but often at the expense of their quality. The preference for quantity over quality stems from the fact that reality TV sub-genres are broadcast for mass audiences, which results in

the creation of mainstream TV shows that achieve high viewership ratings. Given that, reality TV can be seen as a cultural phenomenon that has changed the historical development and current position of television as a mass medium [Giles 2012]. An assessment of the specific globalising tendencies and processes resonating within contemporary television production is offered in the following case study. Its aim is to point out the ways and possibilities of adapting a globalised theme, namely a foreign container reality game show, to produce its glocalised (Slovak) version. Effective methodological procedures and qualitative research methods are applied for this purpose.

2. METHODOLOGICAL APPROACH

Qualitative research of this kind is not standardised and, due to its flexibility and openness of research questions and analytical categories, it allows the researchers to analyse the problem in more depth. The object of qualitative analysis is, in addition to the observation of persons (research participants), to examine different contents (research material) and their means of expression [see, e.g., Gavora 2006; Trampota & Vojtěchovská 2010].

Considering the topic and the main objective of the present study, we focus on television contents and their meanings, and therefore we employ qualitative content analysis as the primary research method. This type of qualitative analysis examines the collected data or analyses specific media products (research material) while emphasising their “quality” (the meaning of the analytical categories contained in the research material) rather than “quantity” (the multiplicity, frequency of the analytical categories contained in the research material). However, if qualitative content analysis is to fulfil its main purpose, several methodological procedures need to be undertaken prior to its implementation. In the first step, it is important to establish and justify the selection of appropriate research material and, therefore, the objects of investigation. At the same time, we emphasise that this type of analysis focuses on a smaller number of research units and is characterised by subjectivity. This means that a possible change of the researcher or the research unit itself could affect the outcome of the research. Therefore, the data obtained should only be interpreted in the context of the issue under study.

The selection of relevant research materials is based on the main objective of the study, which is to shed light on the globalisation tendencies of the media industry, specifically on the television sub-genre called *the container dating reality game show*. The popular North American title called *The Bachelor* [Graebner et al. 2002], which has been globalised to several countries around the world, determines our

choice and becomes our first research material. *The Bachelor* is a popular American *container dating game show* or *container dating reality game show* that has been broadcast for over twenty years. The concept of this show is that its participants, potential brides, fight for the opportunity to win the affection of one man. The contestant, who is proposed to by an attractive and well-situated single man, wins. It is essentially a dating and relationship-based television format. It debuted on March 25, 2002, on the American television station ABC and currently includes several so-called spin-off television shows, podcasts and other related material, which, together with *The Bachelor* format, form a media franchise. To date, a total of 27 seasons of the title in question have been produced. The 28th season has been produced since May 16, 2023, and has been produced and broadcast until now. Thus, for the purposes of qualitative content analysis, we select the last completed season (27th), which is also associated with high viewership (e.g., the first episode was watched by 2.96 million U.S. viewers and the final episode was watched by 3.40 million U.S. viewers). As indicated above, this attractive theme has been globalised and adapted by television productions in several countries and parts of the world, e.g., in Africa – *The Bachelor Afrique* [Gatto & Pierre 2022]; UK – *The Bachelor UK* [Atkins et al. 2003] and many others [Episode List: The Bachelor 2023]. Slovakia is no exception with the format called *Ruža pre nevestu* [*A Rose for the Bride*] [Alchus et al. 2023]. The first Slovak adaptation of the foreign format *The Bachelor* could also be considered a container dating reality game show called *Nevesta pre miliónára* [*A Bride for a Millionaire*] [Núñez 2006]. In this case, however, it is not a faithful adaptation of the globalised format *The Bachelor*. Although the main idea of this Slovak TV show is preserved (the female contestants' individual struggles to charm one man), there are several significant narrative-conceptual changes in *Nevesta pre miliónára* that distinguish it from the aforementioned original version. The title *Ruža pre nevestu* becomes the second part of our research material, and in this case we emphasise once again its extraordinary success amongst Slovak television viewers (e.g., the final episode was the most watched programme of the day in the offer of all Slovak television stations) [Vávra 2023]. Thanks to this commercial success, TV Markíza has confirmed the second season, *Ruža pre nevestu 2*. It is scheduled to be broadcast in 2024 on TV Markíza in association with the local Internet-distributed television channel Voyo.

The empirical part of the study is based on the qualitative content analysis defined above. To achieve relevant qualitative results, we not only select appropriate research material, but we also construct indicative analytical categories. By compiling them, we assume that the similarity between the two parts of the

research material is considerable. Yet, we believe that the globalised product and its glocalised version are not entirely identical in terms of either form or content. Several content changes are present in the domestic (adapted) version, reflecting the social, cultural, and media conditions and expectations of Slovak media audiences. Aiming to test our assumption, we determine the following analytical categories (abbreviated AC) and the related research questions (abbreviated RQ). Defining the analytical categories, we draw upon Lacey's model designed for the fictionalisation of TV genres [see, e.g., Lacey 2000; Mikuláš 2008; Bučková 2019]:

- AC1: *Scene* (location and anchoring of the research material in time and space).
- AC2: *Characters* (the contestants, the presentation of their characteristics and the stereotypes they personify in the research material; the presence and role of the moderator in the research material).
- AC3: *Narrative* (the plot, or the way of conducting and developing the action in the research material – e.g., through the depiction of interpersonal relationships, conflict situations or the development of the action through the implementation of various games and competitions, etc.; description of the main idea and theme of the analysed research material).
- AC4: *Iconography and style* (the means of expression present in the research material, which tend towards the genre of the container dating reality game show; the technical, semiotic and artistic grasp of the research material – e.g., the editing process, the possibilities and ways of using camera technology and/or artificial intelligence in order to capture the contestants, etc.).
- RQ1: How are the scene (location), characters (reality show participants and presenter) and narratives (how the story is conducted and developed) portrayed in the research material? Is it possible to identify specific characteristics and stereotypes represented by the persons present in the research material? Do the themes and main ideas of the analysed research units differ?
- RQ2: To what extent do the means of expression present in the selected research units represent the sub-genre of reality TV – the container dating reality game show? What are the differences between both research units in terms of their iconography and style, or the ways of their technical, semiotic and artistic representation?
- RQ3: What type of adaptation is used when modifying the first research unit (the globalised title) to produce the second research unit (the glocalised title)?

3. RESULTS AND DISSCUSSION

Within the qualitative content analysis, we focus on a reflection on the globalising and glocalising tendencies applied within the creation of two “container-style” reality game shows. The purpose of the case study is to highlight selected production practices used by the creators of *The Bachelor* and *Ruža pre nevestu* formats, through which the reality shows in question became widely popular television programmes achieving high ratings amongst domestic and foreign media audiences. Attention is paid to the ways and possibilities of adapting the globalised title (*The Bachelor*) into its glocalised version (*Ruža pre nevestu*), and thus to comparing the results obtained.

Although the qualitative analysis of the American reality game show *The Bachelor* is limited to its 27th season, we emphasise that stylistically and iconographically, all its previous seasons are more or less identical. However, the narrative elements are changed or modified in each season due to dramatization and the producers’ efforts to bring something different and specific, and thus attractive to the audience, with each new season (e.g., change of location, nature of sub-competitions, host, number of contestants, etc.). However, the principle of the whole format, especially when it comes to the assessment of the theme, topic, or main idea, remains the same across all its seasons. For this reason, the results of the qualitative content analysis of the selected seasons – *The Bachelor: Season 27* [Graebner et al. 2023] and *Ruža pre nevestu 1* [*A Rose for the Bride: Season 1*] [Alchus et al. 2023] – can be generalised to the specific TV formats called *The Bachelor* and *Ruža pre nevestu*. This is somewhat similar to comparing the talent-based reality show *America's Got Talent* [Cowell 2006] with its adaptation *Československo má talent* [*Czechoslovakia Has Talent*] [Minařík & Minarčín 2010], where we would not focus on specific seasons and/or episodes but would consider the *America's Got Talent* and *Československo má talent* television formats as two similar television products.

The first research unit, titled *The Bachelor: Season 27* (hereinafter referred to as *The Bachelor*), premiered on January 23, 2023, with a final cast of thirty women, potential “brides”, and a “groom” being announced on January 4, 2023. Production began on September 26, 2022, in Agoura Hills, California, with the contestants and the entire cast and crew relocating to Tallinn, the capital city of Estonia, a month later [Simpson 2023]. These two locations (Agoura Hills and Tallinn) became the central locations for the creation of the container dating reality game show in question. Other locations, in which (specific parts of) the project took place as well, included the Bahamas, England (London), and Hungary (Budapest), with the final episodes depicting the environment of Krabi Province in Thailand. Thus, six

different locations were selected to produce the analysed research unit. For the first time ever, during that season ABC Television did not focus on one primary “competition location”, but instead presented several world-famous cities and luxury destinations. The ambition of the “bride” to win her “groom” was portrayed as a travel documentary spanning over a period of almost two months (filming began in late September 2022 and concluded in mid-November 2022). Regardless of the numerous changes in locations, the contestants were continuously filmed by cameras and were subject to rules that, amongst other things, did not allow them to go beyond the boundaries of the defined territory. For this reason, this season of *The Bachelor* can be considered a “container-style” reality game show.

The final, eleventh episode was broadcast by ABC on March 27, 2023. The individual episodes were presented once a week, continuously over a period of just over two months (January 23, 2023 – March 27, 2023). The only exceptions were the eighth and ninth episodes, which were released on subsequent days. The day and time of the broadcast was set by ABC on Mondays, and the title earned prime-time position in the television programming structure (20:00 – 22:00 p.m., a total of 120 minutes of airtime, including commercial breaks).

The show was hosted by Jesse Palmer, the Canadian television personality, sports announcer and former professional NFL football player. His role was not only to guide the competition (e.g., during the rose ceremony, while introducing the rules of the sub-games, coordinating the potential “brides” and the “groom” during their meetings, etc.), but also to act as an intimate friend of the “groom” on the show. Thus, the host acted as a legitimate participant in the show in question and to some extent influenced the decisions of the contestants. Interestingly, Jesse Palmer himself became the main personality of *The Bachelor: Season 5* [Graebner et al. 2004], but the relationship with his “bride” did not continue after the show had ended. The narrative aspect of the analysed title, or rather the dramaturgical structure of the narrative of each episode, was constructed from the statements of the performers – they commented on the course of actions and on the arising, often conflicting or emotionally demanding situations. Another “team member” who would have occupied the position of a show announcer (either present “in the picture” or as a voice-over, i.e., “out of the picture”) was not present in the material under study. In fact, the narrators were the show participants themselves, including the host, Jesse Palmer.

Zach Shallcross, a 27-year-old American “bachelor” and technical manager of a software company located in Austin, Texas, was selected as the main character. His past was marked by excellent academic results achieved at college and also by

interest in professional sports. Zach Shallcross only became famous based on his performance in the nineteenth season of the spin-off title *The Bachelorette* [Gale 2022] working with the concept of searching for the right “groom” (amongst a group of male contestants) involving two different “brides” – Rachel Recchia and Gabby Windey – both of whom were also runners-up on the version of *The Bachelor: Season 26* [Graebner et al. 2022] starring Clayton Echard as the “groom” [Kassabian 2022]. Zach Shallcross (hereinafter referred to as “The Groom”) was one of the finalists in the nineteenth season of *The Bachelorette*, which brought him to the attention of both media audiences and audiovisual content creators. He thus secured his participation in reality TV projects with a similar focus, including the analysed research unit. Considering that, we reasonably argue that the selection of contestants in the examined season of *The Bachelor* was, to a significant extent, determined by the popularity that the performers had achieved in previous seasons or within the show’s associated spin-off versions. This was also evident in relation to the choice of contestants, i.e., the potential “brides”. These included, for example, the niece of a popular country singer, Miss Southern California, Miss Florida, and many other well-known names present in American show business. However, according to statements made by the ABC television company and the show’s host himself, Jesse Palmer, the research unit in question “... *didn’t focus on gratuitous drama. It was, in fact, the most emotional and nostalgic season ever, with an extraordinary emphasis on relationships and true love. Zach was unlike some of the other ‘grooms’ in that he was very poised and not dramatic, focused on finding love and his person, which, after all, he proved during the previous show he was a part of, The Bachelorette*” [Wagmeister 2023]. Based on the above, the season we are examining could be seen as a kind of reflection of a love story, or as an emotional drama. The creators of the show also adapted the choice of contestants to the given concept – in addition to the “groom”, who presented himself through his visual appeal, charisma, but above all honesty, sincerity and lack of side interests, along with female personalities popular in American show business, there were also a number of “brides” occupying common professions in everyday reality (e.g., licensed medical professionals, marketers, real estate brokers, etc.) and characterised by “non-intrusive” natures (the choice of “ordinary women from the crowd”). It was as if by selecting suitable candidates, the producers were trying to create a functional relationship between the “bride” and the “groom”, with the real possibility of it continuing beyond the show. However, physical attractiveness, sex appeal, charisma, and the age of the contestants (all the show’s participants were between 23 and 30 years old, including the “groom”) were still amongst the conditions for

participation in this dating container reality game show. The external and internal character traits of those present then determined the stereotypes that the contestants – one groom and thirty potential “brides” – were to represent during the show. Even though the most recent season of *The Bachelor* format sought to move beyond the “stale narrative” of the submissive woman who is meant to support the dominant man, it is still media content in which one man is given the opportunity to choose his “true love” from several dozen women vying for his favour. With the intention of reducing such gender disparities, the producers focused (amongst other things) on creating a spin-off format called *The Bachelorette*, where a woman (the “bride”) chooses her man (the “groom”). However, despite these production efforts, there was, and still is, a constant presentation of a narrative which does not portray gender roles in a well-balanced manner.

The analysed TV show, *The Bachelor*, presented a single man who was expected to choose his fiancée and life partner from thirty possible “brides”. The main idea of this reality game show was to create an ideal pairing. The primary task of the “groom” was to decide as to which of the contestants would become his potential wife and who he wanted to share his life with after the competition was over. In terms of the dramaturgical structure of the narrative, the “groom” eliminated some of the candidates each week. This entire elimination process and essentially the complete show culminated in the handing over of the last rose, and thus the selection of the most suitable “bride” of all the participating persons. This person eventually became the winner in the “battle for the groom’s heart”, but also the winner of the competition itself. The participants present in the media content under study travelled individually or in groups to several romantic and exotic locations to spend some time with the “groom”. All the situations they experienced and the conflicts they faced were constantly recorded by cameras. It is emphasised that the way the dramatic and often controversial or incriminating footage was handled, edited, and compiled into a specific format followed the common iconography of the container reality game show format focused on dating. The title *The Bachelor* was a depiction of a group of contestants living together, “trapped” in one place, or in multiple restricted locations, with their actions continuously captured by cameras (hence the label *container show*). The contestants performed daily activities or participated in several sub-competitions (that is why we speak of a *game show*), with the aim of attracting the “groom’s” attention or obtaining individual opportunities to meet the “groom” and, above all, to win his affections (that is why we justifiably speak of a *dating show*, and therefore of so-called *dating programme*). However, in the described research unit, the established dramaturgical

structure was not always followed (e.g., the “groom” gave out more or fewer roses than originally planned; the “groom” eliminated a candidate outside the normal elimination process based on (not) offering roses; the candidate withdrew from the show or received a rose based on a Twitter/X vote of the audience or thanks to the “groom’s” first impression, etc.). All these narrative variations became sources of drama and conflict, leading to the gradual revelation of the true intentions and characters of the individual “brides” and thus towards their gradual elimination. In the final episodes, the two remaining “brides” met the family of the “groom”. Based on the course of the dates in question, he chose one of them and offered her “the last rose” (Kaitlyn “Kaity” Biggar, 27, Kingston, Ontario, a nurse with whom the “groom” Zach Shallcross is still a couple) in the exotic surroundings of Krabi Province, Thailand. In the *After the Final Rose* episode, which immediately followed the conclusion of the entire “final act”, the “groom” and the “bride” – the finalists – participated in a talk show where, amongst other things, the identities of the main protagonists of the currently planned seasons of *The Bachelor* and *The Bachelorette* were revealed. Also of note was an episode called *The Women Tell All*, in which the women already eliminated from the competition met to discuss their thoughts and experiences with *The Bachelor* format and with “The Groom” himself.

Luxury and exoticism defined all the environments in which the analysed show took place. Variable camera techniques – static or dynamic – were used to capture all the places and scenes involved. The footage, as mentioned above, was later edited, and supplemented by the performers’ statements. This dating container reality game show and the way it was narratively, iconographically or stylistically treated primarily focused on the depiction of (un)friendly relationships between the same-sex contestants. The presentation of male-female relationships, especially in the sense of depicting intimate scenes, as was the case, for example, in *Too Hot to Handle* [Gibson & Bennett 2020] or *Big Brother USA* [Walsh et al. 2000], was not significant. The first season of our second research unit, the Slovak reality game show *Ruža pre nevestu* was largely set in exotic Turkey (specifically its ten episodes), and only the last two episodes were produced in Slovakia (depicting Košice, Žilina, and Bratislava – the hometowns of the final three contestants). This container dating reality game show, abbreviated as dating programme, consisted of twelve episodes in total, broadcast by TV Markíza from March 3, 2023, to June 2, 2023 (three months in total), every Friday during prime-time at 20:30 p.m., with one episode lasting approximately 110 minutes of airtime (including commercials). The selected “Turkish location”, according to the directors M. Liška, M. Varga and M. Ondruš, was, in fact, created using three luxurious villas inhabited by one “groom” and

eighteen potential “brides”, and almost continuously filmed. At the same time, the participants of the show – the male player (“groom”) and the female players (“brides”) – were not allowed to arbitrarily cross the boundaries of these territories [Pravidlá šou Ruža pre nevestu: S niektorými drsnými podmienkami nerátali ani súťažiaci [Rules of the Show Rose for the Bride: Some Harsh Conditions Weren't Even Foreseen by the Contestants] 2023]. Because of the competitive nature of the described research unit, its strictly defined spatial and temporal frame, and the main intention of the “groom” to find the right “bride” for himself, the title *Ruža pre nevestu* can reasonably be described as a container dating reality game show.

The host of the show was a young Slovak actor and model Krištof Králik, known mainly from the episodic comedy TV show *Pán profesor* [*Mr. Professor*] [Dubovská et al. 2020], where he played one of the supporting roles. His role was to guide the “groom” throughout making decisions, to give him friendly advice regarding the show, but above all to supervise the organisation of the various competitions that the show’s participants had to take part in during the filming, including the staging of the final, knock-out “rose ceremony”. The narrator was the “groom” himself, Tomáš Tarr, and his “brides” – together they commented on the situations and interrelationships that arose, thus essentially determining the course and direction of the described show (together with other narrative, iconographic, stylistic, or technical, semiotic, and artistic elements). The voice-over was not present in the analysed work, and the whole show, from the point of view of the narrator’s position in the story, was based on the performers’ utterances, supplemented by the host’s accompanying words.

The main character, and therefore the “groom”, was a single 30-year-old man, Tomáš Tarr, a businessman, model and occasional actor, who accepted TV Markiza’s offer to participate in the *Ruža pre nevestu* project. The “groom’s” reach on the social networking site TikTok [Tarr 2023], his overall charisma and the way he acts in front of the camera were, in the words of the creators of the analysed show, the reason why they decided to approach this native of Štúrovo, Southern Slovakia, currently living and working in Bangkok, Thailand [Tomáš Tarr – osobnosti [Tomas Tarr – Personalities] 2023]. The stereotype of a successful, financially secure, yet physically attractive, charming, seemingly kind and affectionate “bachelor” who is looking for a bride because several of his relationships have ended due to cultural differences or different mentality of women [Ruža pre nevestu dobehla do finále s rekordom. Prinesie Markíza druhú sériu? [A Rose for the Bride Reached the Finals with a Record. Will Markiza Bring a Second Series?] 2023] was

portrayed convincingly in the show *Ruža pre nevestu*. The “groom” chose his “bride” from eighteen unmarried women. These represented different, often hyperbolised depictions of several female stereotypes. In general, many of the participants in this reality game show were described as overly emotional, jealous, possessive, vulgar, aggressive, or mentally unstable. However, the focus of the analysed reality game show was on classifying its participants into groups of *bad girls* (they were part of the show for ulterior reasons, or their negative qualities were emphasised, such as being calculating, manipulative, aggressive, affective; in the case of *Ruža pre nevestu* it was the so-called *bad girls gang*) and *good girls* (they were part of the show to express genuine love interest; their positive qualities such as empathy, tolerance, intelligence were emphasised; a group called the *normal ones* was thus featured as well). The selection of “suitable” contestants and the creation of stereotyped images of men and women were greatly influenced by the decisions of the creators themselves, and almost all of the participants in *Ruža pre nevestu* could be categorised as *good and bad girls* (these were Slovak women aged between 21 and 34 years old, performing various professions in ordinary reality, characterised by certain charisma, sex appeal, distinctive characters or external traits, or by certain achieved popularity status on social media platforms). In terms of the portrayal of characters and the qualities or stereotypes they represent, we can say that *Ruža pre nevestu* is a format that reflects a long-gone narrative about gender roles and marriage (e.g., the submissive, obedient woman does her best to support the dominant man, the breadwinner in a patriarchal world).

The theme of the reality game show *Ruža pre nevestu* is the presentation of a successful single man who is looking for a life partner amongst eighteen single women, candidates for a “bride”. Since we are talking about a reality game show, the basis of this “game” is respecting the predetermined rules which define the show’s course. Within the format, several meetings took place, during which the “groom” chose one of the participants to get to know her better. These were mostly original, luxurious encounters (e.g., boating, motorbike riding, convertible driving, scuba diving, flying) ending with a romantic dinner for two. The time that the “groom” spent with the potential “bride” on an individual date was limited, and at the end of the day each of the couple returned to their respective villas. In a few cases, the “groom” also participated in several group meetings, the course of which could greatly influence the “groom’s” decisions as to whom he would not give the rose to, and thus whom he would eliminate from the competition in the next “rose ceremony” (the origin of the established phrase *Will you accept my rose?*). The

elimination of the show's female participants took place once a week. In some cases, however, the "groom" did not eliminate any of the contestants (all of them received a rose) or, on the contrary, he did not give the rose to several "brides" at the same time (several contestants were eliminated in one week), or some of the contestants quit the show of their own free will or were disqualified because of a violation of the rules. Sub-competitions were also an essential element of *Ruža pre nevestu*. The "brides" were involved individually, but also in groups. Winning then provided them with immunity during the next "rose ceremony" or with a meeting with the "groom" on a joint date. In the final two episodes, the last three contestants met the "groom" in Slovakia, which gave them the opportunity to get to know their families in person. The last episode presented the final decision of the "groom" and thus the answer to the question of which of the two finalists he would finally choose as his "bride". She eventually won by receiving the last rose and a wedding ring (the contestant Petrana Galatea Oráčová, 21 years old, from Bratislava, Slovakia, an ASMR YouTuber, college student, but with whom the "groom" Tomáš Tarr is no longer in a relationship).

A container reality game show of this type is an ideal environment for recording interpersonal relationships, partner conflicts or disagreements between the contestants. *Ruža pre nevestu* presented authentic emotions, the battles of two constantly fighting "camps", friendships, but also betrayal and hatred. The depiction of intrigues between the various candidates in the struggle for the favour of the "groom" by its iconographic, stylistic or narrative treatment clearly referred to the sub-genre of reality TV called *container dating reality game show*, to which the research unit in question belongs.

The scenery of the show was, as mentioned above, set in three luxurious Turkish villas. The largest one housed the "groom", the remaining two housed the contestants. The complex included a swimming pool, and luxuriously furnished interior and exterior. However, various camera techniques (e.g., fly-on-the-wall, drones, static or dynamic shots created by cameramen, etc.) were only used to capture the accommodation where the female participants of the show resided. The footage was later edited and intertwined with the performers' statements. The aim of *Ruža pre nevestu* became an attempt to capture the tense atmosphere in often escalated situations. It could also be said that this container reality game show-type dating programme concentrated more on depicting (un)friendly relationships between the same-sex contestants than on reflecting on male-female relationships, including the presentation of intimate scenes, as was the case, for example, in

Svadba na prvý pohľad [*Wedding at First Sight*] [Núñez 2020] or *Love Island* [Jaško & Bors 2021]. The daily routines of the prospective “brides” in the villa were recorded, as well as the competitions, the moments they spent together with the “groom” in Slovakia or in the Turkish residence, the closing ceremony, and so on. The depiction of deeply private or intimate scenes, typical, for example, for the titles *Big Brother: Súboj* [*Big Brother: Duel*] [Jaško 2005] and *Hotel Paradise* [Jaško 2012], was not the primary essence of the analysed show. This kind of “compromising” audiovisual material, when available, was only discussed in detail in the context of the associated online entertainment show *Bez ruže* [*Without a Rose*] [Alchus et al. 2023] broadcast on the Voyo platform in the late evening.

In the *Discussion* section, we focus on answering the research questions posed in the methodology, drawing on the results of the qualitative content analysis conducted above. The first research question (RQ1) concerns the analytical categories of *scene* (AC1), *characters* (AC2) and *narrative* (AC3). Our aim is to compare the research materials through these three variables specifically. Based on our qualitative content analysis, we found obvious differences in the use of *scenes* (in terms of their number) in the selected research units. While in the first analysed show, *The Bachelor: Season 27* (*The Bachelor*), individual performers visited a greater number of locations (namely Agoura Hills, USA, Tallinn, Estonia, Bahamas, London, England, Budapest, Hungary, and Krabi, Thailand), the second title, *Ruža pre nevestu 1* (*Ruža pre nevestu*) was set exclusively in exotic Turkey followed by various locations in Slovakia (Košice, Žilina, and Bratislava). As far as the specific *characters* (*reality show participants and presenter*) are concerned, significant differences can be seen exclusively in the number of the participating “brides”. The creators of *The Bachelor* cast thirty women, while the number of candidates in the show *Ruža pre nevestu* was much smaller (eighteen single contestants). However, both TV shows involved one “groom” and one host. Both hosts of the aforementioned titles (Jesse Palmer and Krištof Králik) can be identified as public figures whose identical efforts were to direct the course of the show, to supervise the organisational structure of the various competitions, and to act as a “groom’s advisory body”, thus to some extent being able to influence the decisions of the present contestants. Zach Shallcross, a 27-year-old American “bachelor” and technical manager of a software company in Austin, Texas, was selected as the protagonist (the “groom”) in *The Bachelor*. In the Slovak show, the desired “groom” was a single 30-year-old man, Tomáš Tarr, a businessman, model, and occasional actor, currently based in Bangkok, Thailand. In both cases it is obvious that not only the American but also the domestic (Slovak) production deliberately chose a

young, professionally successful and charismatic candidate for their projects. The only difference between the “grooms” can be registered in the acquisition of their previously existing media popularity. Zach Shallcross became publicly known thanks to his performance in the nineteenth season of the spin-off title *The Bachelorette*, while Tomáš Tarr gained significant social media admiration through his previous work on the social platform TikTok (with a reach of 1.2 million followers). Some differences between the two analysed television products can also be observed in the selection of the shows’ participants themselves. The choice of contestants on *The Bachelor* was largely determined by the already existing popularity of the adepts (e.g., niece of a famous country singer, Miss Southern California, Miss Florida, etc.), although it is true that some of the “brides” were not in any way active in the media and were affiliated with ordinary professions (e.g., a nurse, a real estate broker, a business manager, etc.). On the contrary, most of the participants of the title *Ruža pre nevestu* – with a few exceptions (e.g., former participants of the reality show *Farma [The Farm]* [Kodoň 2011] or the talent show *Česko-Slovenská SuperStar [Czech-Slovak SuperStar]* [Žilák et al. 2009], a winner of a beauty contest in Slovakia) – were not celebrities or well-known media personalities before they took part in the show. Their faces and names were not known to the general public, although many of them engaged in media-related activities long before their participation in the analysed show (e.g., an ASMR YouTuber, a manager for creating strategies for companies or brands and their communication on social platforms, etc.). However, physical attractiveness, sex appeal, charisma and relatively young age were among the conditions for participation in these dating container reality game shows in both studied cases. At the same time, in both cases the creators focused on selecting participants who possessed a certain potential for presenting their TV projects towards pre-arranged media audiences (e.g., most of the contestants had created accounts on social platforms with a relatively significant reach, which were later used as media channels further promoting these TV projects).

The narration (the way the story was built and developed) was similar in both titles. The essence of the American version of the reality game show was, in the scope of eleven episodes, to reflect the individual decisions of the “groom” when choosing his potential wife. Television audiences were informed of that verdict in the form of a weekly “elimination process”, at the end of which one of the remaining contestants became the rightful winner. The actual unfolding of the story was mainly based on the personal (individual or collective) encounters of the show’s participants with the “groom” himself and the resulting, mostly conflicting situations. However, in the

first research unit, the established dramaturgical structure was not always followed (e.g., the “groom” eliminated the candidate outside the normal elimination process, etc.). In the final episodes of the American version of the show under study, the remaining “brides” met the family of the “groom”. However, in the Slovak title *Ruža pre nevestu*, the oppositional dramaturgical intention in the given situation occurred, and thus it was the “groom” who got to know the families of the finalists. Based on the course of the given meetings, in both cases the “grooms” chose their “brides” – these women became the winners of the shows. The container dating reality game show *Ruža pre nevestu* consisted of twelve parts where, like in *The Bachelor*, the “groom” participated in multiple meetings with the potential “brides”, with the intention of getting to know them better. The elimination of the participants by not handing them over the rose (a symbol of advancement in the game) occurred once a week until the last contestant, the winner, remained. The imaginary storyline was identically complemented by the performers’ statements or comments on the course of the show and the often conflicting or emotionally charged situations that arose. In this title, too, there were circumstances that deviated from the predetermined narrative structure (e.g., the “groom” did not exclude any of the participants, etc.). Considering all the above-mentioned facts, we conclude that the way the narrative was conducted and developed was almost identical in both analysed research units.

As far as the *specific characteristics and stereotypes* represented by the individual participants of the analysed reality game shows are concerned, several of them could be identified. *The Bachelor* and *Ruža pre nevestu* similarly represented the stereotype of the submissive woman and the dominant man who has the right to choose the “love of his life” from a considerable number of candidates “fighting for his heart”. In both cases, the stereotype of the single, successful, financially secure, yet physically attractive young man was also present. In terms of the portrayal of women and the stereotypes or characteristics associated with them, we observed some differences between the analysed programmes. The Slovak version of the container reality show was based on the selection of several characters representing various “escalated” female stereotypes (e.g., many participants were described and portrayed as too emotional, jealous, possessive, vulgar, aggressive, or mentally unstable). Based on the typology of candidates mentioned above, there was a natural division into two groups (*bad girls* – possessing qualities such as being calculating, manipulative, affective, and *good girls* – characterised by empathy, tolerance, intelligence). Conversely, the American title *The Bachelor* sought to

“soften” the references to patriarchal society and the “exacerbated” female stereotypes represented by the show’s female participants by selecting candidates with predominantly non-conflicted natures, and by creating a “sister” show, *The Bachelorette*, where a woman (the future “bride”) chooses a man (the “groom”). However, despite a few differences in describing the characteristics and stereotypes of the show’s male and female participants, it can be stated that *the theme* and *the main idea* were the same for both research units – the shared main idea of both media products was the creation of an ideal partner pairing, with the ultimate choice of the ideal partner being “in the hands” of the man. Their common theme was the idea of a single, young, ambitious man who can find, or choose, a fiancée, a “true love”, from a certain number of candidates pre-selected by the production.

The answer to the second research question (RQ2) is based on an assessment of the analytical categories of *iconography and style* (AC4). By comparing the data collected through the above-mentioned variables, we will evaluate both research units in terms of the use of expressive devices typical for a container dating reality game show. Thanks to the successful implementation of qualitative content analysis, we found that the *iconographic and stylistic means of expression* present in the selected research material largely represent the genre of reality TV – a container reality game show focused on dating. Indeed, in *The Bachelor*, all situations (within the significant number of locations used, to which the individual participants were taken) were continuously captured by cameras – which corresponds to the essence of a reality show. The contestants were obliged to abide by predetermined rules (game show), while not being allowed to cross the boundaries of the predefined game territory, or luxury dwellings across diverse landscapes (container show). Moreover, its primary essence was the competition of several women for the favour of one man (dating programme). Thus, it can be comprehensively stated that the way of working with dramatic, often controversial shots and their post-production correspond to the iconography of the genre of the container reality game show centred on dating. The homogeneous iconographic classification is also represented by the Slovak format *Ruža pre nevestu*. The show was about depicting interpersonal, conflicted, or friendly relationships between the contestants living in several luxury villas, two of which, where the female participants of the show lived, were constantly under surveillance of camera systems (container reality show). The intention of the “groom” to find a life partner, but under the condition of following certain rules, classifies the title as a dating show. We can see that both research units, by their iconographic, stylistic and narrative treatment, refer to the sub-genre of reality TV called *the container dating reality game show*.

The iconography and style, namely the work with the technical, semiotic or artistic representation of the shows in question is identical both in the American theme and in its glocalised, Slovak version (although there are some differences determined exclusively by the socio-cultural and media conditions of the given country). In general, however, the environments in which the studied shows were set can be defined as luxurious, sumptuous, or exotic. The technical aspect of the TV shows was mainly represented by static and dynamic camera shots, supplemented in the final stage of production by the actresses and actors' statements, while the latest technological achievements, such as drones were also used. Both shows, *The Bachelor* and *Ruža pre nevestu*, despite sharing their main intention to create an ideal "married couple", also focused on presenting the tense atmosphere and (un)friendly relationships between the same-sex contestants. In an identical way, both products also approached the revelation of intimate or otherwise incriminating scenes exclusively concerning the participating candidates. However, their presence in the programmes broadcast in prime-time was limited, sidelined at the expense of depicting the daily routines of the prospective "grooms", the competitions conducted, the individual and group meetings with the "groom", or the final ceremony.

CONCLUSION

With the development of digital media and the proliferation of possibilities for unrestricted consumption of media content (e.g., through Internet-distributed television), television genres are growing in popularity. Paradoxically, the increased demand for television products, including reality TV genres, is followed by a decline in their quality caused by their heavily standardised production. Nevertheless, the unsophisticated mass viewer often fails to notice the repetitive elements contained in "TV stories", which are constantly recycled by producers into more and more titles and/or glocalised versions adapted to local cultural conditions. It is globalisation that is "opening up" the media market to the whole world, with overseas production playing an important role in this process, disseminating stories in a way that the majority audiences can understand.

A qualitative content analysis of *The Bachelor* and *Ruža pre nevestu* television formats and their specific seasons provided us with a closer look at current trends in reality show production. By identifying the analytical categories in the research material and comparing them, we answered the first two research questions, which gave us an opportunity to comprehensively assess the globalising tendencies of the television industry with respect to a particular genre of reality TV, the container

dating reality game show. Respecting the established methodological procedure, we are able to make a relevant assessment of the final, third research question (RQ3) concerning similarities and differences between the analysed reality TV product and its glocalised (Slovak) version.

Attempting to answer the question at hand, we start from the definition according to which adaptation is seen as the translation of stories into other works. Its main task is to preserve as faithfully as possible the idea of the original work and to find the most appropriate way of expressing it. Referring to the words of Levinský and Stránský [1974], we argue that the globalised television format *The Bachelor* becomes a theme, or a template for the creation of its glocalised Slovak version called *Ruža pre nevestu*, and thus *Ruža pre nevestu* is, in a way, an adaptation. However, several procedures are applied in the creation of the adapted work. Leitch [2009] speaks of *transposition* (the theme/preface is transferred into the adaptation without any interventions or with a minimal amount of changes; this is the so-called *literal adaptation*), *commentary* (the theme/premise is either intentionally or unintentionally altered in the adaptation; this is the so-called *faithful adaptation*) and *analogy* (it represents a significant departure of the adaptation from the original (theme/premise) in order to create a new work; this is the most common type of adaptation, and thus the so-called *free adaptation*). The mentioned adaptation procedures can be used not only when analysing film works in relation to their literary sources, but also when trying to evaluate a television show and its topic (if, of course, this work is based on a particular source). In our case, it is essentially a matter of assessing the similarities between the globalised (American) television show and its glocalised (Slovak) version.

Even though we subjected specific seasons of *The Bachelor* (Season 27) and *Ruža pre nevestu* (Season 1) to qualitative content analysis, we generalise the results to the entire television formats, which we have already adequately justified in the methodology section of the study. In this context, we can claim that the formats of *The Bachelor* and its Slovak variant called *Ruža pre nevestu* are qualitatively more or less identical in several aspects, which was also demonstrated by the results of the content analysis. We found that both container dating reality game shows apply identical *iconographic and stylistic means of expression* to their form and content (identical way of working with auditory, visual, and audiovisual elements or semiotic, technical and artistic components that correspond to the iconography of this sub-genre of reality TV).

However, the conducted case study reveals one significant fact – the detailed examination of the narrative elements contained in the second research unit (the

first season of the title *Ruža pre nevestu*) identifies the presence of several narrative differences compared to the first research unit, the twenty-seventh season of the television format *The Bachelor*. We mention, for example, the different choice of locations, the different number of contestants with differentiated character traits and represented stereotypes, the number of aired episodes, the nature of the sub-tasks, or the course of individual and group encounters between the “brides” and the “groom”. These changes are deliberately applied to the production strategies utilised by domestic (Slovak) producers to gain the attention of domestic media audiences, that is, Slovak television viewers, while respecting their cultural habits, attitudes, traditions, opinions, and expectations. This is exemplified by casting more contestants with different skin colours representing African-American or Asian-American people (the twenty-seventh season of *The Bachelor*) in contrast with the representation of contestants with exclusively White/Caucasian features and traces, which is in line with ethnic composition of Slovak population (the first season of *Ruža pre nevestu*). The deliberate selection of “bride” candidates with mostly non-conflicted natures and serious jobs, with the aim of creating a “love story” with a happy ending and a functional relationship off-camera (the twenty-seventh season of *The Bachelor*) at the same time contrasts with the constant emphasis on various affairs, intrigues and other dramatic scenes occurring within the all-female ensemble, which is also matched by the choice of contestants with eccentric looks, expressions and characters (the first season of the title *Ruža pre nevestu*). However, by focusing on *The Bachelor* and *Ruža pre nevestu* formats, despite several differences in the narrative details of the specific seasons mentioned above, we can say that the *narrative structure (scene, characters and the narrative itself)* has a similar essence in both analysed formats – luxurious locations are used, all of them are temporally and spatially limited; the contained characters present certain qualities and stereotypes dramatizing the plot; the presence of a single male host with a friendly attitude towards the show’s participants is noticeable; interpersonal relationships, conflicted situations or the development of the plot through the realisation of various sub-competitions are depicted; and both formats refer to the identical main idea and the depicted theme. Thus, the basic principle of *The Bachelor* and *Ruža pre nevestu* television formats remains the same across all their seasons, including Seasons 27 and 1 under scrutiny. We therefore consider the assumption we made in the introduction of the study (*the American globalised theme and its adaptation in the form of a glocalised title are qualitatively more or less identical, but there are several content changes in the domestic title that*

accept local interests, attitudes, and customs) to be adequately substantiated and confirmed. In this context, we refer again to the fact that the format of *The Bachelor* becomes the theme, or rather the template, for the creation of its glocalised version named *Ruža pre nevestu*, respecting specific adaptation practices.

The answers to the research questions show that the template, the North American format of *The Bachelor*, is in many respects deliberately altered by the Slovak production because of its domestication, i.e., the attempt to adapt the presented media content to the social, cultural, and media conditions of the country and the expectations of Slovak media audiences. Based on the categorisation of adaptation practices proposed by Leitch [2009], we therefore consider the format of *Ruža pre nevestu* to be a *commentary* or a *faithful adaptation* of the original work *The Bachelor*, where the theme/preface is deliberately altered during the adaptation by the producers in order to accept the local interests, customs, needs and expectations of the local media audiences. Paradoxically, when looking at the specific seasons associated with the mentioned formats, which are characterised by several significant narrative differences mentioned in the empirical part of the study, we would be more inclined towards the so-called *anthology*, i.e., a *free adaptation*, representing a significant departure of the adapted work (the first season of the format *Ruža pre nevestu*) from its possible theme/preface (the twenty-seventh season of the format *The Bachelor*) in order to create a new work. For the reasons stated above, we find it more than problematic to assess the relationship between the first research unit (the globalised title) and the second research unit (the glocalised title), in terms of identifying certain adaptation practices. Definitively, however, it can be said that the production of Slovak reality TV formats, including reality shows, is specific in that it adapts foreign themes and adjusts them to the cultural, social, and political conditions of the country, which was also confirmed by the results of the case study.

However, the main aim of the study was to clarify the globalisation tendencies of the media industry, with regard to television production and the sub-genre called *the container dating reality game show*, which we fulfilled by qualitative content analysis of the research material – the selected television formats and their specific seasons. We also created a space for further exploration of the issue at hand (e.g., evaluation of the impact of technology on the production of the given sub-genre of reality TV, assessment of the position of the “storyteller” or the host of a container dating reality game show in terms of the use of camera technology and artificial intelligence, etc.).

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GEOPOLITICAL AND MILITARY ASPECTS OF RUSSIA'S WAR AGAINST UKRAINE IN 2014–2022¹

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Abstract

The article is devoted to the analysis of the course of the Russian-Ukrainian war (2014–2022) in the geopolitics context. Russia's war against Ukraine is determined by geopolitics and Vladimir Putin's imperial policies. The emphasis on the military aspects of this international political phenomenon is due to the return of conventional war to its traditional place in the international relations system, which

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has become a key threat to international security. During the period under review, Russia moved from implementing hybrid warfare to conventional warfare concept.

Key words: geopolitical divisions, Russian-Ukrainian war, military campaign, hybrid war, conventional war, front, strategic maneuvers, propaganda and disinformation.

INTRODUCTION

Ukraine's geopolitical location at the intersection of the west-east and north-south axes predisposes the Ukrainian state to play an important role in European politics, especially in European security. Zbigniew Brzezinski, calling Ukraine a geopolitical pivot, wrote that “the very existence of an independent Ukrainian state helps transform Russia. Without Ukraine, Russia ceases to be a Eurasian empire (...). However, if Moscow gains power over Ukraine again, along with its fifty-two million people and major resources as well as its access to the Black Sea, Russia automatically again regains the wherewithal to become a powerful imperial state, spanning Europe and Asia. Ukraine's loss of independence would have immediate consequences for Central Europe, transforming Poland into the geopolitical pivot on the eastern frontier of a united Europe [Brzeziński 1998]. The Russian Federation's return to the USSR's geopolitical code and imperial policy inevitably led the Kremlin to war with Ukraine, treated in the context of imperial identity as existential. Russia saw Ukraine as an important part of its imperial space, a zone of vital interests and exclusive influence.

The collapse of the USSR and the emergence of an independent Ukraine dramatically changed the geopolitical situation in the region. In the process of establishing the Ukrainian state in the international arena, various scenarios for its geopolitical activity were plotted. Richard Kluger distinguished three models of such activity: 1) the “Finnish way,” when a politically and economically stable Ukraine has a pro-Western orientation, maintaining neutrality in military matters, 2) “light Ukraine,” when it is economically tied to Russia, maintaining neutrality in the military dimension, 3) “heavy Ukraine,” when it is closely integrated with Russia on all levels. In turn, well-known diplomat Henry Kissinger has also proposed three models for Ukraine's geopolitical activity: 1) reintegration with Russia, 2) integration with the West, and 3) drifting between East and West with many unknowns [Baluk 2008, 90-91]. Without abandoning the general assumptions of his concept of the global balance of power between the superpowers, Kissinger, after a year of Russian full-scale war, concludes that in the existing geopolitical conditions, the concept of

neutrality (Finlandization) will not work, so Ukraine in the peace process should be linked to NATO [Kissinger 2022].

Finlandization of Ukraine required respect for such a status of the Ukrainian state by the most important actors in international politics. In contrast, there was no political will on the part of the Russian Federation to cooperate with the West in the Central and Eastern European area within the framework of such initiatives as the Partnership for Peace or the Eastern Partnership. Russia's drive to confront the West indicated the need for Ukraine to make a geopolitical choice in favour of one of the centers of influence, as the policy of balancing/drifted was becoming dangerous, pushing Ukraine into the security grey zone. The indecisiveness of the Ukrainian authorities in terms of the country's geopolitical choice and the sluggishness of European politicians about integrating Ukraine into collective security systems allowed Russia to prepare for war.

The Russian Federation's neo-imperial policy toward Ukraine exhibits historical and geopolitical determinism, which has a significant impact on the Kremlin's conduct of the war.

The purpose of this article is to study the geopolitical and military aspects of Russia's war against Ukraine in 2014–2022, as well as to determine their role in achieving the Russian Federation's military and political goals, and to analyze the scenarios of the military campaign at different stages. The research assumptions conditioned the use of system and factor analysis elements, allowing us to determine the importance of geopolitical and military aspects in the implementation of the Russian Federation's policy objectives.

GEOPOLITICAL DETERMINANTS OF WAR

Several basic directions of geopolitical thinking took shape in Ukrainian political thought at the turn of the 20th and 21st centuries. The concepts took into account the bridging and location of the country on the cultural and civilizational borderland, emphasizing the geostrategic importance of the west-east and north-south axes. Two basic currents of thought dominated Ukrainian geopolitical strategy, namely – the balancing interests strategy (balancing policy or neutrality/post-balancing policy) and the strategy of geopolitical choice between Russia and the West [Dobra 2016].

The historical experience of the Central and Eastern European countries, located between Germany and Russia, argued for rapid integration into European and Euro-Atlantic structures. The process of reintegration of the former Soviet space

and the expansion of NATO and the EU in 1999–2007 changed the geopolitical situation of Ukraine, which took shape after the end of the Cold War. Deprived of hard security guarantees, Ukraine found itself in a gray zone between Eurasian and Euro-Atlantic structures. The Budapest Memorandum (1994) and the NATO-Ukraine Charter (1997) did not protect against the potential aggression from the Russian Federation. From 2004 to 2009, internally, the Orange camp was unable to convince the Ukrainian public and Western countries of the need for Euro-Atlantic integration. In addition, the attitude of Germany and France at the 2008 North Atlantic Alliance summit in Bucharest prevented Ukraine from receiving a Membership Action Plan. The unfavorable decision for Ukraine and Georgia did not cool the Kremlin's imperialist inclinations but accelerated Russia's preparations for war. Russia's policy of generating and managing low-intensity conflicts in the former USSR, including the Russian-Georgian war and recognition of the independence of Abkhazia and South Ossetia, indicated potential threats to the Ukrainian state. However, after the change of power in 2010, Ukraine abandoned the priority of Euro-Atlantic integration and slowed down the process of European integration. The above decisions as well as the extension of the lease of the Black Sea Fleet base in Sevastopol further aggravated Ukraine's geopolitical situation in the face of political, economic and military pressure from Russia. President Viktor Yanukovich failed to sign Ukraine's association agreement with the EU at a Vilnius summit in November 2013. The majority of the pro-European-minded public did not accept the denial of the Western direction of development, leading to the Revolution of Dignity. In 2014 the Russian Federation took advantage of Kyiv's power transition and the strong Western choice of Ukrainian society to unleash a hybrid war against Ukraine, including using a military component to annex and install a low-intensity conflict in Donbas. Putin's regime, fearing color revolutions and pursuing an imperial policy, has embarked on a multi-dimensional destabilization effort against Ukraine.

Modern Russian geopolitics quickly rejected the Western (Atlantic) direction, returning to the geopolitical code of the Tsarist and Bolshevik Empires. *In Russian geopolitical concepts, Ukraine plays an important existential role within the framework of a powerful and imperial Russia. The Kremlin's primary goal has been to block the process of nation-state formation in Ukraine and its reintegration into post-Soviet/Eurasian structures. Characteristic of the Russian political class is the thinking of Alexander Dugin emphasizing that the loss of control over the post-Soviet space will transform Russia into a regional state. The states of the former USSR*

essentially have two options for choosing their geopolitical orientation. The favorable option for Russia involves a return to Eurasian reintegration projects. The unfavorable scenario, on the other hand, assumed the development of sovereign and independent states, aspiring to NATO and expressing pro-American attitudes. The existence of a sovereign Ukraine was considered by Russian scholars to be an undesirable phenomenon for Russian geopolitics, as pro-Western Kyiv controls the northern Black Sea coast [Dugin 2000, 220, 348–349, 796–802]. Accordingly, several basic currents can be distinguished in Russian geopolitical thinking. Within the framework of the first, the seizure of all of Ukraine or a significant part of it was considered [A. Dugin, I. Panarin, A. Solzhenitsyn], while the second option assumed the weakening of the Ukrainian state and the creation of quasi-states on its territory [V. Tsymbursky]. In turn, the third trend, pragmatic, considered two types of relations: economic domination and political-military domination – K. Sorokin [Shulha 2006, 421]. In Russian geopolitical thought, the Ukrainian issue has always occupied an important place and has most often been presented as a revolt against the “*Russkiy mir*” (Russian world) and a threat to the Russian state.

In the modern strategic doctrine of the Russian Federation, there is a mixture of different forms of Russian collective, inclusive and defensive imperialism [W. Baluk, M. Doroshko 2022, 148], which have a common denominator - great-country Russian chauvinism. Vladimir Putin's rule was determined by geopolitics and a longing for a lost empire. His regime's strategy was aimed at restoring and maintaining the high geopolitical status of the Russian state at the expense of neighbouring nations, most notably Ukraine [Isajew 2016, 52–60]. Putin's entourage created its own hybrid geopolitical concept, selecting for it the necessary ideas and views from the field of Russian conservative thought (including Ivan Ilyin), the concept of the “*Russkiy mir*”, the “*Eurasian empire*,” and Anti-Westernism [“*Deutsche Welle*” 2022]. An independent and sovereign Ukraine stood in the way of the Eurasian empire restoration, so the solution of the Ukrainian question became a kind of idea fix for Vladimir Putin, who instead of the Soviet concept of “*brotherly nations*” proposed the concept of “*Russians and Ukrainians are one nation*”. [“*President.gov.ua*” 2021].

With Putin's return to the presidential seat (2012), under the influence of domestic (“*mud revolution*”) and international (Arab Spring) events, the Russian authoritarian regime proceeded to implement an aggressive international strategy based on the assumptions of imperial policy. The states of the post-Soviet area sought to impose the assumptions of reintegration concepts, in which the Kremlin

would be the center of power and the center of decision-making. The structures of the external empire were to be defined by such organizations as the Eurasian Economic Union and the Collective Security Treaty Organization. In the external dimension, on the other hand, there was a return to the narrative of defensive imperialism, designed to protect Russia from the supposed threat from the West. In the above plans, Ukraine played a key role on three levels: 1) existential as an important element of the “*Ruskiy mir*,” including the narrow sense of the unity of the three East Slavic peoples, 2) reintegration of the post-Soviet space within the Eurasian empire, and 3) competition with the West for influence in Central and Eastern Europe.

Having significant opportunities to influence Ukraine within the framework of soft power policy, Russia has decided to pursue hard power. By annexing the Crimean peninsula, the Kremlin sought to increase its control over the Black Sea and make the Sea of Azov an internal body of water. Combined with a strong military grouping in Kaliningrad, the militarization of Crimea allowed Russia to apply political and military pressure on all of Central and Eastern Europe, significantly worsening Ukraine's geostrategic situation. The Ukrainian state, having a long border with the Russian Federation to the east, was additionally exposed to danger in the northern direction from Belarus, where the Lukashenko regime was a loyal ally of Vladimir Putin. In the southern direction, in addition to a large troop buildup in annexed Crimea, the security of the Ukrainian state was also threatened by a Russian troop buildup in Transnistria. Moreover, by installing a low-intensity conflict in the Donbas, Moscow has acquired additional opportunities to destabilize Ukraine from within. The activation of military power on the part of the Kremlin was accompanied by energy blackmail activities within the framework of pipeline policy (construction of Nord Stream II and Turkish Stream). The above strategy of the Kremlin generally referred to the time of Peter I, when Russia was gaining and expanding its influence in the Baltic and Black Sea basins. In modern times, in addition to military power, the Kremlin also used energy resources, treating them as an important part of its geopolitical game. Moving from a policy of rivalry to confrontation with the West in the post-Soviet area, it ruthlessly sought to control/conquer all or a significant part of Ukraine, which was in line with classical Russian geopolitical thinking. The Kremlin considered Ukraine as the key to rebuilding Russia's imperial power. For this reason, even deepening Kyiv's relations with the EU and NATO was treated as a betrayal. Ukraine's choice of geopolitical orientation in favour of EU and NATO integration was redeemed by Russian aggression. The role and importance of the CEE is

increasing in Ukraine's foreign and security policy, including the strategic partnership with Poland. The change in geopolitical orientation in Ukrainian society has been largely influenced by the aggressive policies of the Russian Federation. Between 2004 and 2013, the level of support for NATO membership stood at 20 %, then as the number of opponents oscillated in the 50–60 % range. The annexation of Crimea and Russia's installation of the conflict in Donbas have shown real threats to the security of the Ukrainian state and society. Data from a number of opinion polling centers, including the Kyiv International Institute of Sociology, show a reversal since 2014 in support for Ukraine's membership in the North Atlantic Alliance – 47 % in favour and 32 % against (“Slovo i dilo” 2021).

Issues of European integration were less contentious, but positive growth in support could be observed on this issue as well (see Table 1). In contrast, Russia's full-scale invasion of Ukraine contributed to a spike in supporters of both EU and North Atlantic Alliance membership. According to “Rating Group” data, in October 2022, the level of supporters for Ukraine's NATO membership was at 83%, and for EU membership at 86% of respondents [“KMU.gov.ua”].

Table 1

Dynamics of support for EU and NATO integration between 2014 and 2022 (%)

		2014	2015	2016	2017	2018	2019	2020	2021	I 2022
NATO	Support	43	45	42	45	44	53	49	56	60
	Not support	31	31	32	33	36	31	36	33	33
EU	Support	54	58	52	55	51	62	57	64	65
	Not support	31	20	23	26	29	19	28	26	28

Source: Dynamics of foreign policy orientations, 16–17 II 2022, https://rating-group.ua/files/ratinggroup/reg_files/rg_international_moods_022022_press.pdf

The open support of pro-Russian groups for the aggression of the Russian Federation and the illegal occupation of part of Ukrainian territory resulted in their delegitimation. The disappearance from the political scene of the Party of Regions, the Communists, the Socialists and the Opposition Party for Life promoted the consolidation around the idea of European and Euro-Atlantic integration not only of society, but also of a significant part of the political elite.

THE GOALS OF THE RUSSIAN WAR AND THE PLANS OF THE MILITARY CAMPAIGN AGAINST UKRAINE

The emergence of the modern Russian-Ukrainian war was inevitable, the only question was when the necessary prerequisites for its resolution would arise. Having found itself in the position of a buffer zone, Ukraine faced a real threat of losing its state sovereignty and territorial integrity, as 2013 became the culminating stage of this struggle between the West and Russia for Eastern Europe, in which Ukraine occupies a central position.

As for Europe, Russia, with its aggression against Ukraine, has set a goal to destroy the existing architecture of European security, including the norms of the Helsinki Final Act, and to establish a security system in Europe in which it will have a dominant position. Therefore, Russian military aggression has a multifaceted nature. The ultimate goal of the war unleashed by Russia is also multi-level. At the domestic level – the creation of an imperial-type model of the Russian state development and the consolidation of an authoritarian pro-fascist regime [Van Herpen 2014; Eidman 2022; Garner 2023] through the implementation of a policy of expansion and hegemony. At the international level – the destruction of Ukraine as a state, Ukrainians as a nation, as an alternative to the Russian state authoritarian system, the seizure of the territory of Ukraine as a springboard for a geopolitical offensive on Central-Eastern Europe. At the regional level – a change in the balance of power in favor of Russia and a review of the results of the Cold War, with the subsequent restoration of the Vienna system of relations in Europe. To this end, Russia seeks to destroy the existing security architecture in Europe based on NATO, the EU, and the OSCE. At the global level – the destruction of the existing world order and the construction of a new system on these ruins, in which Russia will take the place of a “world power” as the main dominant force capable of managing global world processes. For Ukraine, which was a victim of Russian aggression, the main goals in the Russian-Ukrainian war are to stop and repulse this aggression and restore the territorial integrity of Ukraine.

The multi-level nature of Russia's military and political goals put Putin in front of the dilemma of choosing the form of waging such a war both against Ukraine and against the West. Traditionally, both Soviet and Russian military strategy adheres to the model of the classic large-scale military campaign of the First and Second World Wars. Such a plan was proposed by General M. Gareev [Budzisz 2021, 72–73], a well-known representative of the Soviet military school. It forecasted the formation of several fronts in the south, south-east, north-east and north directions with the

concentration of several army-level operational units on them. To solve such military and political tasks, it is necessary to use at least a 500,000-strong army, supported by groups of 400–500 combat aircraft, 600–800 tanks, many artillery formations and appropriate front-line rear support. The military campaign plan for the implementation of such an open, large-scale aggression against Ukraine was to be carried out in three stages. The first stage consisted in the military occupation of Crimea, the second – in the capture of the eastern and southern regions of Ukraine, and the final third stage of Russia's military aggression committed against Ukraine – the capture of the city of Kyiv and the central regions of Ukraine after the completion of the military occupation of Crimea, eastern and southern regions of Ukraine.

However, when implementing such an extreme option, the military and political leadership of Russia took into account its high price and heavy losses, both material and international. Conducting such a regional conflict of medium intensity required general mobilization and the imposition of martial law on the entire territory of Russia or its European part. Conducting a military campaign on the scale of this level of conflict could last from one to several years. Of course, V. Putin could not dare to take such costs and risks, so he resorted to an asymmetric local conflict of low intensity in the form of a so-called hybrid war according to the plan of the Chief of the General Staff of the Armed Forces of the Russian Federation, General Valery Gerasimov [Gierasimow 2013].

Such a scenario for the implementation of the war consisted of its federalization and confederation with the formal possibility of secession from Ukraine and the annexation of Ukrainian territories adjacent to it to Russia. The goal of such a scenario is to establish complete control over Eastern and Southeastern Ukraine. The Kremlin leadership considered this option the most optimal, as it does not involve large losses compared to the first one and at the same time will make Ukraine's existence as an independent state impossible in the future.

RUSSIA'S TRANSITION FROM A HYBRID TO A COMBINED LARGE-SCALE CONVENTIONAL WAR AGAINST UKRAINE

For eight years, the ultimate goal of the Russian hybrid war – the destruction of Ukraine as a state – has not been achieved. The second stage was never completed, because only a part of Donbas was captured by Russian troops and it was not possible to create a full-fledged “Novorossiia”.

Under these conditions, Russia had only two possible options for the continuation of the war with Ukraine. The first option consisted in resuming the attempt to

create “Novorossiia”, which involves the military occupation of not only the entire Donetsk and Luhansk regions, but also the regions adjacent to Donbas.

As a second option, it was decided to return to General Gareev's plan – to conduct a large-scale air-ground-sea operation on the entire territory of Ukraine. The implementation of this plan for a large-scale war began on February 24, 2022. The military campaign, as reported by the German publication “Bild”, was to consist of three phases: the occupation of southern Ukraine from Crimea; capture of the northeast with the crossing of the borders of the Kharkiv and Luhansk regions and further advance to the Dnipro and Poltava; attack on Kyiv from the north [Bild 2021].

Unfortunately, the Ukrainian authorities considered these reports of the Western media as disinformation, the purpose of which is to plunge the country into chaos and intimidate foreign investors. Consequently, this led to the fact that it did not pay due attention to building a multi-echelon defense of the country. This strengthened Putin's belief in the insecurity of the borders and large administrative and industrial centers of Ukraine. In addition, the experience of waging a hybrid war in Donbas and Crimea convinced him of the low combat effectiveness of the Armed Forces, which was 4–5 times greater than the Russian army.

Such a distorted perception of reality prompted Putin to resort to a blitzkrieg – a lightning military invasion with limited forces, which was supposed to complete the operation in 20 days. The declared purpose of the “special military operation” is to defend the Russian Federation against the military threat posed by Western countries and Ukraine, to end the war in Donbas and to protect the population of the so-called “DPR” and “LPR”. In accordance, on February 24, around 6:00 a.m., massive missile strikes were carried out on military infrastructure facilities throughout Ukraine: airfields, air defense facilities, control points, warehouses, etc. Russian troops attacked Ukraine in the following directions: from the north – to Pripjat and Chernihiv (from Belarus); from the east – to Konotop, Sumy, Kharkiv, Okhtyrka, as well as from the line of contact with “LPR” and “DPR”; from the south (from the Crimean side) – to Kherson, Nova Kakhovka, Melitopol.

The undeclared war and Ukraine's unpreparedness for the Russian invasion allowed the enemy to seize large areas during the first weeks of fighting (more than 124,000 square kilometers).

DEFENSE OF KYIV

The most priority military and political task of the “special military operation” of the Russian Federation was the capture of the Ukrainian capital, Kyiv. This tempting

goal actually determined the format of waging a large-scale blitzkrieg war against Ukraine. If in Horev's previous plan this task was supposed to be solved at the final stage of the war against Ukraine, after the complete defeat of the Armed Forces of Ukraine, then in the "Blitzkrieg" format it was believed that the quick capture of Kyiv would lead to the surrender of the political leadership of Ukraine, and as a result, Ukrainian military groups would be deprived of military and political leadership and will themselves stop organized resistance to Russian troops.

Thus, powerful groups of Russian troops were created to capture the Ukrainian capital, both in the Russian territories bordering Ukraine and in Belarus. The attack on Kyiv was carried out by these forces from two operational directions – Polisky (on the right bank of Dnipro) and Siversky (on the left bank of Dnipro) in order to take the Ukrainian capital under a complete siege and deprive it of any reinforcement from outside the city. Already on the second day, February 25, 2022, advanced forces of the Russian Federation began an assault on the suburbs of Kyiv, but after suffering significant losses, the enemy was forced to prematurely introduce additional units from the second echelons and reserves into battle. Thus, the enemy did not achieve the set strategic goals in the first 2–3 days of the assault, and realized that the intention to carry out a “blitzkrieg” failed. Having failed to achieve the main military and political goal envisaged by the "blitzkrieg" format and having suffered devastating losses from the strikes of the Defense Forces of Ukraine, the armed forces of the Russian Federation began to withdraw their troops from the Kyiv, Chernihiv and Sumy regions.

EASTERN FRONTLINE

Having lost the first period of the military campaign, Putin did not consider himself to have lost the war. Therefore, in the second, decisive phase, he concentrated his forces in the eastern and southern directions in order to capture as much territory as possible and, from new positions, to force the Ukrainian authorities to agree to Russia's terms during the next negotiations. If Kyiv refuses to capitulate, the Russian Federation will wage active hostilities until it destroys Ukraine as a sovereign state and Ukrainians as a nation, unless they renounce their national identity in favor of the Russian people. Therefore, the East and South of Ukraine became the main theater of military operations.

The course of hostilities there was also of global significance. The head of the Ministry of Foreign Affairs of the Russian Federation S. Lavrov noted that the "military operation" in the culminating period should put an end to the dominance

of the USA in the international arena. Accordingly, the Kremlin also adjusted the military-strategic goal of the Russian offensive operation. On April 22, 2022, the Deputy Commander of the Central Military District, Rustam Minnekaev, stated that the goal of the “second phase of the special operation” is “to establish full control over Donbas and Southern Ukraine” to ensure a land corridor to Crimea and “another exit in Transnistria, where also there are facts of oppression of the Russian-speaking population” [“Slovo i dilo”, 2022].

This theater of war significantly expanded the Russian army's ability to use its advantages in numbers, aviation and heavy artillery. In addition, combat operations were conducted mainly on flat and open terrain, which enabled the Russian military to advance quickly. Since Donbas borders the southwestern region of Russia, they had no difficulties with communication, which was relevant in the first period of the military campaign. Therefore, the strategy and tactics of offensive actions were adjusted. In particular, the Russian troops resorted to “scorched earth” tactics – they massively and continuously bombarded the positions of the Armed Forces of Ukraine with barrel artillery and anti-aircraft guns before the offensive, inflicted devastating blows with missiles and attack aircraft. Only after that the Russian units dare to attack the Ukrainian defenders, because this provided them with a slow but forward advance [Perepelytsia 2021, 289]. On its way, it completely destroys Ukrainian cities and villages.

However, in the summer of 2022, while continuing the strategic defense operation, the Defense Forces of Ukraine inflicted significant losses on the Russian troops in both the eastern and southern operational directions. This course of hostilities led to the fact that the Russian troops in the southern direction were forced to go on the defensive and concentrate their offensive actions exclusively in the eastern direction, concentrating their efforts on capturing the entire territory of Donetsk and Luhansk regions.

Significant Russian forces in fierce battles with groups of the Defense Forces of Ukraine forced Putin to limit the strategic tasks of the war. Thus, on June 29, 2022, he stated that the ultimate goal of the special operation is not the “denazification” of Ukrainians, but the protection of Donbas and the creation of conditions that guarantee the security of Russia [Ukrainian Institute For The Future, 2022], i.e., the joining of Luhansk and parts of the Zaporizhia and Kherson regions occupied by Russian troops into its composition and access to the administrative borders of the Donetsk regions, where the main groups of Russian troops were concentrated.

Taking advantage of this regrouping of the enemy, the Defense Forces of Ukraine launched a counteroffensive operation on the right bank of Kherson region, which forced the Russian command to transfer elite units of Russian troops from the northeastern direction to the defense of the Kherson direction, thus exposing the northeastern part of the Eastern Front. The Defense Forces of Ukraine certainly took advantage of this and successfully carried out their counteroffensive operation on this part of the frontline as well, liberating the entire northeastern part of this frontline along the Vovchansk-Izyum-Lyman line from the enemy. Thus, they took possession of a strategic initiative that allowed them to liberate the city of Kherson and the entire right-bank part of the Kherson region. This created the prerequisites for possible offensive actions on the left bank of Dnipro river.

However, the Ukrainian troops did not have enough reserves to advance further into the Luhansk region and liberate its entire northeastern part up to Luhansk. The reason for this was the concern of the West in the rapid development of counter-offensive actions of Ukrainian troops, and as a result, the help of Western partners in providing weapons turned out to be quite limited. The cessation of Ukraine's counteroffensive actions on this part of the frontline made it possible for Russian troops to return to the Svatove-Kreminna line, from where they previously retreated, and build a multi-echelon defense there, which the Ukrainian defense forces were unable to overcome until the end of 2022. In this way, the Ukrainian troops lost the strategic initiative and switched to positional defense.

Russian troops continue the construction of defensive fortifications on the Svatove-Kreminna line and in the southern direction, and even conduct counterattacks. Ukraine continues to strike at concentrations of manpower, headquarters, warehouses and oil depots of the occupiers. In the Bakhmut and Avdiivka areas, the enemy has concentrated its main efforts on offensive operations and has had limited success. The Russians are suffering colossal losses in Donetsk region, but the Armed Forces of Ukraine are also paying a high price.

CONCLUSIONS

The Russian-Ukrainian war is a natural, long-term phenomenon based on identity conflict. At the same time, the Kremlin's goals in this war go far beyond Russian-Ukrainian relations, as they pursue Russia's fundamental interests of restoring its status as a world power and its future existence as an imperial-type civilization.

The priority of introducing a specific form of warfare against Ukraine stemmed from both Russia's lack of conventional resources and its inability to achieve its military

and political goals in a hybrid war format against Ukraine. For eight years, the ultimate goal of Russian hybrid warfare – the destruction of Ukraine as a state – was not achieved. Realizing the futility of such a hybrid means of attaining the ultimate political goal, Putin resorted to a “special military operation” in the war against Ukraine.

Having lost the first period of the military campaign, Putin did not believe he had lost the war. Therefore, in the second, decisive phase, he concentrated his forces in the eastern and southern directions in order to gain as much territory as possible and, from his new position, force the Ukrainian authorities to accept Russia's terms during subsequent negotiations. However, in the summer of 2022, continuing the strategic defensive operation, the Ukrainian Defense Forces inflicted significant losses on Russian troops in both the eastern and southern operational directions. Nevertheless, the Ukrainian counteroffensive in recent months has been effectively halted by the mobilized Russians. The U.S. lend-lease agreement has not been implemented, and Ukraine continues to receive limited quantities of weapons. In addition, the current U.S. administration is not transferring F-16 fighters and long-range ATACMS missiles to Ukraine. As a result, Ukraine needs more supplies to counter Russia and be able to attack. The Russian regime, despite its difficulties, remains viable and capable of continuing the fight. The timing of this war, security in Europe, and the credibility of the United States and NATO countries depend on increased military assistance. If Ukraine's independence and territorial integrity are not preserved, the axis of authoritarian countries will continue to expand their existing borders and support each other during the war.

It has been proven that the Russian-Ukrainian war is a natural long-term phenomenon based on identity conflict. At the same time, the Kremlin's goals in this war go far beyond Russian-Ukrainian relations, as they pursue Russia's core interests of restoring its status as a world power and its future existence as an imperial-type civilization. Since Russia is unable to change its position in the existing system of international relations and achieve world power status either through political and diplomatic means or through economic competition, Putin has decided to destroy this world order by unleashing war.

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THE ATTITUDES OF SLOVAK UNIVERSITY STUDENTS TOWARDS FOREIGN STUDENTS: THE CASE OF NITRA REGION

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Abstract

The main aim of this article was to explore the attitudes of Slovak students towards their foreign classmates and then compare them with the perceived attitudes of foreign students. The research was based on an analysis of a questionnaire carried out at Constantine the Philosopher University in Nitra, Slovakia. The results show the tendency to interpret one's own behaviour more positively than it is perceived by others. Moreover, the analysis revealed some of the causes of a negative attitude towards foreigners. Variables as age and language barrier were confirmed to be significant when forming an attitude towards foreigners.

Key words: attitude, prejudice, migration, perception, students

INTRODUCTION AND OBJECTIVES

Foreign students at Slovak universities are an important group of foreigners in Slovakia, their number has increased especially in the last two years due to the ongoing war conflict in Ukraine, therefore we considered it necessary to study the attitudes of Slovak university students towards their classmates. According to the Centre for Scientific and Technical Information of the Slovak Republic, in the academic year 2022/23, 16,590 foreign students studied in Slovakia at the first or

second level of university studies and 384 foreign students at the doctoral level of study. ¹Foreign students make up almost 20% of the total number of students. The number of foreign students at the University of Constantine the Philosopher from 31st October 2023 was as follows: 743 foreign students in full-time study and external study out of a total number of 7010 students. ²As we can see foreign students at the University of Constantine the Philosopher make up approximately 10.5 % of the total number of students.

The main objective of our research was to explore the attitudes of Slovak students towards foreign students in Slovakia and then compare them with the perceived acceptance of foreign students by their Slovak classmates. We conducted the research at the Constantine the Philosopher University in Nitra in the academic year 2023/24 on a sample of 107 of Slovak students and 117 of foreign students.

1. PREVIOUS RESEARCH

The research of the attitudes of the Slovak population towards foreigners was carried out by several authors. A large part of the research is devoted to attitudes towards migrants and refugees, given that this issue has become topical in our territory, especially during the period of the so-called “migration crisis” and later during the ongoing war conflict in Ukraine.

The research carried out in 2009 by the International Organization for Migration in Slovakia was a large-scale research that took place at the national level and was entitled "Public attitudes towards foreigners and foreign migration in the Slovak Republic". The results of this research were processed and published by Michal Vašečka [Vašečka 2009]. According to the authors, the attitudes of Slovaks towards foreigners are influenced by negative attitudes and stereotypes and they are largely determined by economic factors. The attitude of Slovaks towards foreigners is mainly determined by the age, gender and education of the respondents. The author considers women and younger people to be more open to foreigners. As for education, people with secondary and university education are generally more open to foreigners and are willing to accept them as their friends. A higher degree of acceptance of foreigners was expressed by religious people and also by those who had previous personal experience with foreigners.

¹ Available at: https://www.cvtisr.sk/cvti-sr-vedecka- kniznica/informacie-o-skolstve/statistiky/statisticka-rocenka-publikacia/statisticka-rocenka-vysoke-skoly.html?page_id=9596

² Available at: <https://www.ukf.sk/media-a-marketing/dianie-na-univerzite/kalendar-udalosti/205-tvorive-prekladatelske-reflexie-6-idealy-vs-prax>

Another research was carried out by Ondrej Filipec and Nina Vargová in 2018. They studied the attitude of Slovaks towards migrants from non-EU countries [Filipec et al. 2019]. They found out that variables such as sex, age and the level of education influence the attitude toward immigrants. Migration is perceived as a threat mainly by people with primary education and lower income. Students and young people associate migrants from non-EU countries with less negative feelings than retired or older people.

Martina Berišteřová, M. Bozogaňová and T. Pethö studied a perceived attitude of Slovaks towards migrants on the group of foreign students studying in Slovakia. [Berišteřová et al. 2023]. They found out that Slovaks see migrants as a threat to their physical health and safety rather than a threat in terms of economic opportunities and personal property. They have also found out that such variables as lower level of open-mindedness and lower socioeconomic status were associated with more negative perceptions of Slovaks' attitudes towards migrants.

2. RESEARCH METHOD

2.1. DATA COLLECTION

The information necessary for our research was obtained through a questionnaire survey. We carried out the research in the form of an online questionnaire between November 2023 – February 2024. The form contained 24 questions: 20 closed-ended questions and 4 open-ended questions, which provided a lot of significant facts explaining the reasons of either positive or negative attitudes of the students. We subjected the research material to quantitative analysis (close-ended questions) as well as qualitative analysis, where we focused on the content of the open-ended answers and their meaning. We consider this research method to be an effective tool to reach a large number of respondents to provide quantitative data and at the same time the answers to open-ended questions were the rich source of information for further qualitative analysis, thus providing a lot of data to be analysed and processed.

2.2. SAMPLE

The sample consisted of 234 students. The research was conducted at the Constantine the Philosopher University in Nitra, between November 2023 – February 2024. Out of 234 students more than 50% were foreign students (117). As far as the nationality is concerned 72.6 % of foreign students were from Ukraine, 16.2 % were from Russia, 4.3 % from Kazakhstan, 4.3 % were from Belarus and

there was a small group of students from Hungary and Serbia (about 1 % each). As we can see majority of the respondents came from post-Soviet states.

Table 1

Country of origin of foreign students

Ukraine	Russia	Kazakhstan	Belarus	Serbia	Hungary	Other country
85	19	5	5	1	1	1

Source: Author, own research.

As far as the age of respondents is concerned there were differences between the two groups of the respondents. Majority of foreign students (68 %) were from the age group 17–19 years, while most of Slovak students (54 %) were 20–21 years old. An average age of Slovak respondents was 21 years while the average age of foreign students was only 18.9 years. So generally Slovak respondents were older, this is caused by the fact that in post-Soviet countries students finish their secondary education at the age of 16 and thus are able to start university education earlier than in Slovakia. The length of stay of foreign students in Slovakia varied from a few months to 5 years. The majority of foreign respondents were in Slovakia for only 1 or 2 years.

The main aim of this study was to reveal attitudes of Slovak students towards foreign students with the focus on Nitra region. We chose the town of Nitra and the Constantine the Philosopher University due to the fact that there are a lot of immigrants living in Nitra region. Moreover, foreign students studying at the Constantine the Philosopher University make up almost 20 % of the total number of students, thus making it quite a representative sample for the purposes of our study. From the methodological perspective our research presents an exploratory case study aimed at exploring attitudes of Nitra university students.

2.3. RESEARCH QUESTIONS AND HYPOTHESES

There were several research questions behind the research. In the first part of the study we focused on Slovak students and we explored their attitudes towards their foreign classmates. The second part of the research studied how the foreign students perceive their acceptance by their Slovak classmates. In this part of the research we used similar questionnaire so that we can compare the results later. In the last part of the research we compared the results, trying to find out, if

the attitudes of Slovak students correspond with the perceived acceptance from the point of view of foreign students.

At the beginning of our research we formulated five hypotheses. When formulating hypotheses, we focused on these variables:

- Positive attitude towards foreign students
- The length of time spent together at school
- Country of origin
- Command of Slovak language

Hypothesis no. 1: There is a positive relationship between positive attitudes of Slovak students towards foreign students and the length of time they have known each other.

Hypothesis no. 2: There is a positive relationship between positive attitudes of Slovak students towards their foreign classmates and the ability of foreign students to speak Slovak or English language.

Hypothesis no. 3: There is not a relationship between attitudes of Slovak students towards foreign students and the country of their origin.

Hypothesis no. 5: We assume there is difference in the degree of positive attitude of Slovak students towards foreign students and perceptions of acceptance made by foreign students.

3. RESULTS

3.1. ATTITUDES OF SLOVAK STUDENTS TOWARDS THEIR FOREIGN CLASSMATES

In the first part of our research we examined the attitudes of Slovak students towards foreign students. We used a questionnaire with 24 questions. The first two questions of a questionnaire, which followed the introductory demographic part, were aimed at evaluating the attitude of Slovak university students towards their foreign classmates. We asked whether their attitude is friendly or hostile and also whether they treat foreign students in an open or distant way. In the first question the students were asked to rate their attitude to their foreign classmates on a ten-point scale from very hostile to very friendly. 72 % of students marked the attitude as friendly on a scale from 6–10, while up to 46.7 % of the answers chose option 8–10, which represents the highest degree of friendliness. 19.6 % of answers marked 5, which expressed indecision or that they consider their attitude neither friendly nor hostile. 8.4 % of all respondents marked their attitude as more or less hostile, while options 0 and 1, which represented the greatest degree of hostility, were not marked even once. The fifth question examined the conative side of an

attitude and was aimed at their behaviour towards classmates. Again, there was a range of responses from distrustful to open-minded. Up to 85 % of Slovak students claimed that they behave very openly towards their foreign classmates, 10 % indicated a lower level of openness, only 3 % indicated a neutral attitude, that is, 0 and only 0.9 % of responses expressed a distant and mistrustful attitude.

The next two questions were aimed at finding out what affects the positive or negative attitude towards foreign students. As many as 93.5 % of respondents maintained that their attitude towards their classmates does not depend on which country they come from. Question no. 7 was an open question and examined in more detail the reasons and causes of positive or negative attitude. Most of the students responded that they treat everyone the same regardless of their country of origin. Others claimed that their attitude depends more on the character traits of their classmates than on the country they come from. Some expressed that their negative attitude towards their foreign classmates is mainly due to the fact that some of them are unreliable, irresponsible and do not take their studies seriously. They treat responsible and reliable students the same way they treat Slovaks. Some stated that the reason for their partially distant attitude is also the language barrier. Another question we investigated was the extent to which Slovak students are willing to help or advise the foreign student if he needs it. Unequivocal willingness to help was indicated by 73.8 % of students. The answer: "I will help, but only if he asks me to", was chosen by 25.2 % of students. Answers "no" or "mostly no" was chosen by only 1 student (1 %). Questions no. 9 and 10 in the questionnaire survey examined the extent to which foreign students spend their free time together with Slovak students, and then we evaluated whether the results in this part of the questionnaire corresponded with the attitudes in the previous part of the questionnaire. 63.6 % of students stated that they spend their free time mostly with Slovak classmates and 36.4 % claimed that they spend their free time with Slovaks as well as with foreign students. Question no. 9 was to confirm the results from the previous question. We were trying to find out whether Slovaks are willing to invite foreign classmates to parties. Up to 59.8 % gave a positive answer. The remaining 40.2 % represented a negative answer. Based on this question, the rate of spending free time with foreign classmates is lower compared to the results from the previous question. By comparing the results of questions no. 6–8 and questions no. 9–10 we found out that the overall attitude and behaviour of Slovak students towards foreign students is perceived relatively positively, but the rate of

spending free time of foreign students with Slovaks does not reflect the same level of positive attitude. By comparing the results of the last two questions, we can make the assumption that spending free time with foreign students can be influenced by a lower willingness of Slovaks to actively seek out the company of foreign students. Questions no. 11–13 were focused on the quality and quantity of communication between Slovak students and foreign university students. We used various questions to examine the level of interest in communication and distance. As many as 62.6 % of Slovak students claimed that they are happy to have classmates from other countries and that they are interested in the country they come from, 22.4 % expressed a neutral attitude by choosing the answer “I don't know” and only 14.9 % of respondents expressed that they are not interested in their foreign classmates. The next question investigated the degree of willingness to communicate, or avoiding communication and its results correspond with the previous question, i.e. the majority (up to 70 %) of students talk to foreign classmates and do not avoid them. In the open question, the respondents had the opportunity to express possible reasons for reluctance to communicate. They most often cited the fact that foreign students are a closed group, do not show initiative in communicating with Slovaks and mostly communicate only among themselves.

Following questions revealed the reasons why Slovaks communicate less with their foreign classmates. We assumed that one of the reasons would be the language barrier, but the answers to this question in the questionnaire did not confirm this fact. As many as 63.1 % of students expressed that language is not a problem in mutual communication, 26.1 % stated that it is easier to communicate with Slovaks and only the remaining 10.8 % maintained that language is an obstacle to communication and the reason why they communicate less with foreign students.

With another group of questions, we tried to find out if their attitude towards their classmates had changed. We hypothesized that if students spend more time together and get to know each other better, their mutual relationships will also improve. However, according to the results, this assumption was not confirmed. 63.6 % of respondents denied that their relationship with their classmates had changed, and 29 % said that their relationship had changed for the better, and 7.5 % said it had changed for the worse. However, the open question partially confirmed our hypothesis, because a large number of Slovak students stated that the reason why their mutual relations have improved is that they spend more time with their classmates and thus know each other better, and they no longer have prejudices against them as before. Another group of answers indicated that their

mutual relations have changed for the better due to the fact that foreign students have a better command of the Slovak language. Those who wrote that their relationship had not changed meant that their relationship had been positive from the beginning. Some justified the negative attitude towards foreign students by the fact that foreign students have an irresponsible and superficial approach to studies. One of the students expressed the reason why he has no prejudices against foreign students like this: "Foreign students are people like us, we are united by the fact that we are students and that we are in this together".

With another group of questions, we investigated the attitude of Slovaks towards foreigners in general. So we asked not about the personal attitude of the student, but how Slovak students perceive the attitude of other Slovaks towards foreigners. As many as 72.9 % of the answers expressed that Slovaks have a more or less negative attitude towards foreigners if they meet them on the street or in a shop. 58.8 % of students stated that Slovaks are generally closed towards foreigners, 13 % expressed their neutral attitude and only 28.2 % consider Slovaks to be open towards foreigners. When asked whether Slovaks are warm or rather cold towards foreigners, most of the answers were towards the cold answer, while the percentage distribution of the answers corresponded to the previous question measuring positive or negative attitude. Up to 75 % of respondents expressed that Slovaks have a rather negative attitude towards foreigners, of which 15 % of responses expressed the degree of negative attitude by choosing the highest values of 4 and 5. Willingness or reluctance to help in the question no. 22 was manifested in the ratio of 51 % (reluctance) vs. 33 % (willingness), 16 % marked the answer "I don't know". We found out that overall, this part of the questionnaire brought more negative answers, which expressed the closedness of Slovaks, reluctance to help and negative attitude towards foreigners. We believe that the reason for this evaluation is the fact that a person has a tendency to interpret his own behaviour more positively and see himself in a better light than when he evaluates other people. For this reason, students consider themselves to be more positive towards foreigners compared to other residents of Slovakia. Table 2 shows the mentioned differences in the perception of one's own attitudes compared with the perceived attitudes of other Slovaks.

The last open question examined the reasons of either positive or negative attitude of respondents towards foreign students. The positive attitude towards foreign students was justified by several reasons. The reason that often appeared in the answers was that the young generation is more open to the unknown and does not

have as many prejudices as e.g. their parents. One of the answers expressed a great degree of empathy by writing that it is difficult for foreign students to study in a foreign country without family and background, so we should help them and make the situation easier for them. The most common cause of the negative attitude was the irresponsible approach of some foreign students to their studies, their indifference to the rules and inappropriate behaviour in the dormitories.

Table 2

Perceived openness of Slovak respondents compared with their perceived attitude of Slovaks towards foreigners

	Distant = 0 points	1	2	3	4	5	6	7	8	9	Open = 10 points
Attitudes of Slovak students (% of responses)	0	0	0	1	0	4	5	6	21	21	43
Perceived attitudes of Slovaks in general (% of responses)	0	0	1	2	2	15	1	21	21	21	15

Source: Author, own research.

3.2. PERCEIVED ACCEPTANCE OF FOREIGN STUDENTS BY THEIR SLOVAK CLASSMATES

In the following part of our article, we will focus on the second part of our research group, which were foreign students. Our task was to find out how they perceive the attitudes from their Slovak classmates. 86.2 % of our research sample consisted of 1st and 2nd year students, i.e. the majority of our sample were students who have been in Slovakia for several months or not more than a year. As we mentioned earlier, out of the total number of 117 students, up to 85 students came from Ukraine. In the initial questions, we tried to find out their level of command of Slovak language, because we believe that language knowledge has an important role in the integration of a foreigner into the society. As many as 55.6 % of respondents stated that they speak Slovak well, 37.6 % partially speak Slovak, and only 6.8 % said that they speak very little Slovak. According to these data, the language barrier might not play such a significant role in integration of our research sample.

The first group of questions was aimed at finding out whether Slovak students have a friendly or hostile attitude towards the respondents, whether they show trust or distrust in their behaviour. Up to 94 % of respondents wrote that the attitude of their classmates towards them is friendly, of which up to 75 % indicated the highest degree of friendliness on a scale from 8–10. We also noticed a very similar distribution of answers in the case of the question: whether Slovak students treat them with trust or distrust.

Another question studied whether Slovaks are willing to help foreign students if they need something. 70.9 % of students perceive that their Slovak classmates are always willing to help them, 25.6 % said that their classmates will help them only if they ask for it, the remaining 3.5 % wrote that others are not willing to help them.

Questions no. 9 and 10 in the questionnaire survey investigated to what extent foreign students spend their free time together with Slovak students. 50.8 % of students responded that they spend their free time mostly with students of the same nationality, 21.2 % stated that they spend their free time with Slovaks as well as with foreign students, 20.5 % maintained that they spend time with other foreign students but not with Slovaks and 7.6 % of them spend time with Slovaks. By the question no. 9 we wanted to confirm the results from the previous question. We wanted to find out whether Slovaks are willing to invite foreign classmates to parties. 28.2 % gave a positive answer, 42.7 % expressed that they are not usually invited to a joint party. Both of these questions have roughly corresponding percentages of positive and negative answers and reflect the relatively low rate of foreign students spending their free time with Slovaks.

Questions no. 12–14 were focused on the quality and quantity of communication between foreign students and Slovak students. We used various questions to examine the level of interest in communication and distance. 36.8 % of foreign students maintained that they perceive that their Slovak classmates are happy to have classmates from other countries and that they are interested in the country they come from, 34.2 % expressed a neutral attitude by choosing the answer “I don't know” and 29 % of respondents stated that their Slovak classmates are not interested in them and their country. The next question investigated the degree of willingness to communicate, or avoiding communication and its results correspond to the previous question, i.e. 45.3 % of foreign students perceive that Slovaks talk to them in exactly the same way as to each other, 27.3 % think that Slovaks avoid them and do not communicate with them to the same extent as with others, and the remaining 27.4 % expressed their indecisive answer by choosing “I don't know”.

With another group of questions, we tried to find out whether they perceive that the attitude of Slovaks towards them has changed since the beginning of their studies. 36.8 % of students said that they noticed an improvement in the attitude of Slovak classmates, 57.3 % wrote that the attitude of Slovaks has not changed, neither for the better nor for the worse, and the remaining 6 % wrote that the attitude of Slovak students towards them has changed for the worse. With another open question, we tried to find out the causes of these changes. As we assumed, the majority of students report a change for the better as a result of the fact that they communicate more with their classmates, either during schoolwork or in their free time, and therefore know each other better. Some said that their relations with each other did not improve and they still did not become friends. A relatively large group of responses mentions the improvement of their language skills as a factor in the improvement of mutual relations. One of the students responded that his classmates “began to communicate more with him, because they understood that a foreign student is just an ordinary person”.

With the following questions, we found out how foreign students perceive the attitude of Slovaks towards foreigners in general. We asked whether the students perceive that the attitude of Slovaks towards them in shops, offices or on the street is rather negative or positive. 23 % of students expressed that they perceive a negative attitude of Slovaks towards them, 19.7 % chose the answer “I don't know” and up to 57.3 % of students expressed that the attitude of Slovaks towards them is generally rather positive. The question about an open or closed attitude of Slovaks towards foreigners, only 9.4 % of students stated that they consider Slovaks to be closed towards foreigners, 5.1 % marked the answer “I don't know” and up to 68.3 % of foreign students maintained that Slovaks are open towards foreign immigrants. The question that examined the cordiality or Slovaks' reservedness towards them showed more negative responses. Only 4.2 % of students consider Slovaks warm-hearted towards foreigners, 15.3 % expressed a neutral and undecided opinion, and up to 80.3 % of students consider Slovaks cold and reserved. However, when we asked whether Slovaks are willing to help foreigners, up to 72.6 % of students perceive that Slovaks are generally willing to help foreigners, 10.2 % expressed a neutral opinion and only 17 % of respondents expressed that Slovaks have a low willingness to help foreigners.

In the last open question, students had the opportunity to express and write what are the causes of the perceived positive or negative attitude of Slovaks towards them. The majority of students stated that they perceive a positive or neutral

attitude towards them as foreigners. Some of the answers admitted that they sometimes encountered a negative attitude from some people. One of the reasons was that Slovaks have a negative personal experience with some emigrants and this is the cause of their negative attitude. Others maintained that the older generation in particular is full of prejudices and their attitude towards foreigners is more influenced by their political views. Young people, on the other hand, are much more open and less biased towards foreigners. Another often mentioned reason for the reserved attitude of Slovaks was the language barrier, especially when communicating in offices and in shops, some Slovaks are not willing to communicate with foreigners if they do not understand them and do not have the time or the energy to explain something to them several times due to their heavy workload. If we were to summarize it, the positive attitude of Slovaks is perceived and accompanied with gratitude, and in the case of a negative attitude, the students gave logical reasons which they accept and only a very small part of the students condemns the Slovaks for their negative attitude, on the contrary, they are grateful for the acceptance and they realize that sometimes the negative attitude towards them has its own reasons (overload of the office worker, language barrier, negative experience with other foreigners from the same country).

3.3. COMPARISON OF THE ATTITUDES OF SLOVAK STUDENTS WITH PERCEIVED ACCEPTANCE OF FOREIGN STUDENTS

In the last part of the research, we compared the responses of the two groups of respondents. We have selected some of the studied factors as can be seen from table no. 3: friendliness, willingness to help, initiative in the relationship (invitation to spend free time together), interest in communication or avoidance of mutual communication. We also investigated other elements that reflected the attitude of Slovaks (not students) towards foreigners in general. There we decided to compare the degree of positive attitude, cordiality, openness, trust and willingness to help. We assigned an average point (on a scale of 1–10) to each of the examined categories, according to the answers of Slovak and foreign students. We then compared these data. Table no. 3 and graph no. 1 show the comparison of individual results.

When we compare the level of friendliness we can state that Slovak students consider their behaviour towards foreign students slightly more friendly than it is perceived by foreign students. As far as willingness to help is concerned the difference in the selected points is very small and thus perception of Slovak students is almost the same as those of foreign students. The question about being

invited to parties or other free time activities measured the initiative to build the relationship. The difference between the responses of the two groups is bigger than in previous questions (4,6 vs. 8). Slovak students expressed higher willingness to invite a foreign student to a party (an average of 8 points), while foreign students expressed the perceived willingness to be invited to a party by choosing lower points on a scale (an average 4,6). The following questions were aimed at measuring the interest in communication and not avoiding the communication with foreign students. In both cases the difference in answers between the two groups of respondents is approximately the same (1,4). We can state that there is a difference in perception of positive attitude perceived by Slovaks and foreign students. Slovaks tend to perceive their attitude and behaviour as more positive than how it is seen from the viewpoint of foreign students. All the studied aspects confirmed the same tendency. The differences between the two groups are smaller if we measure an attitude in general but they are more significant when we study a conative component of an attitude by asking about a particular behaviour.

Table 3

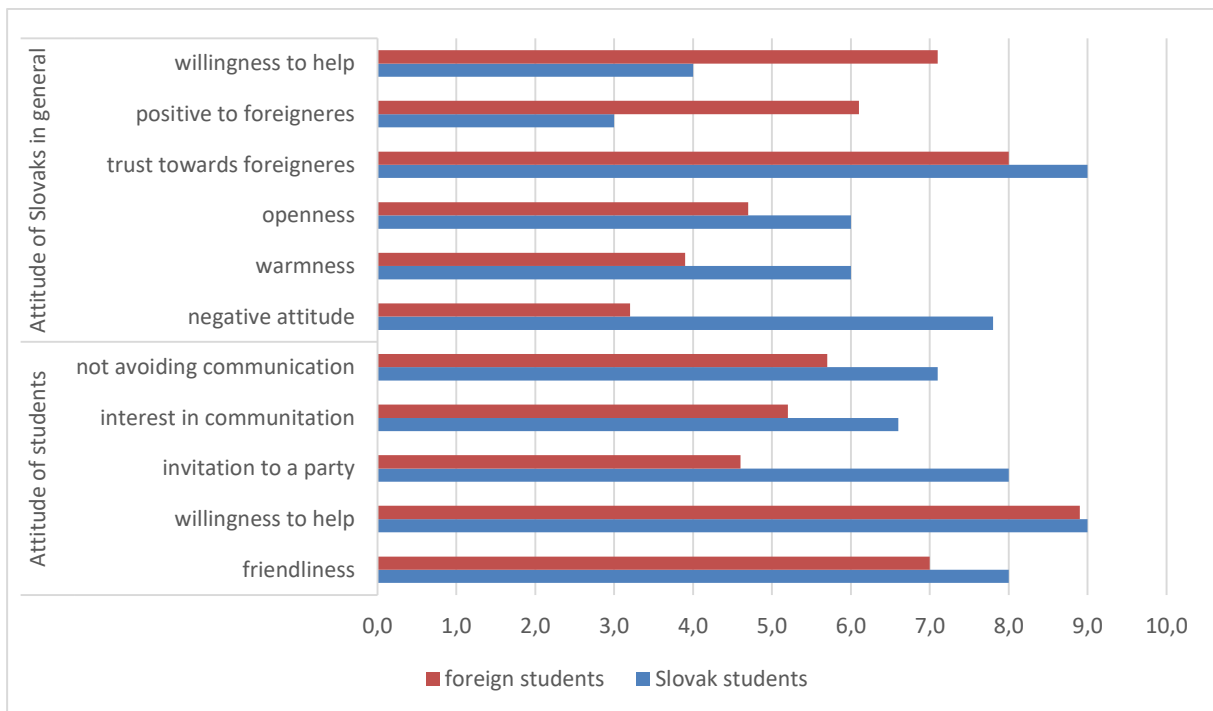
**Comparison of the selected attitudes of Slovak students
with perceived acceptance of foreign students**

	Attitude of students					Attitude of Slovaks in general				
	friendliness	willingness to help	invitation to a party	interest in communication	not avoiding communication	warmness	openness	trust towards foreigners	positive to foreigners	willingness to help
Slovak students	8,0	9,0	8,0	6,6	7,1	6,0	6,0	9,0	3,0	4,0
foreign students	7,0	8,9	4,6	5,2	5,7	3,9	4,7	8,0	6,1	7,1

Source: Author, own research.

Second part of our comparison study was aimed at the perceived attitudes of Slovaks to foreigners in general. We assumed that the differences between the two groups will be similar as in the first part of our comparison. It was not always the case. Characteristics like openness, warmness or trust of Slovaks towards foreigners displayed the similar differences as in the first part of the comparison. Slovak students consider Slovaks to have higher level of warmness, openness and trust than the level perceived by foreign students. The difference between the

groups ranged from 2,1 to 1 points. However, the questions about Slovaks having a positive attitude towards foreigners and being willing to help them showed different results. While Slovak students consider Slovaks to have less positive attitude to foreigners (an average point was 3), foreigners perceive that Slovaks have more positive attitude towards them (an average point 6,1). As far as the willingness to help is concerned the difference between the responses was similar, Slovak students expressed that Slovaks are less willing to help foreigners (an average point 4), while foreign students think that Slovaks are willing to help them (an average point 7,1).



Graph 1. Comparison of the selected attitudes of Slovak students with perceived acceptance of foreign students

Source: Author, own research.

CONCLUSION

The main aim of this article was to explore the attitudes of Slovak students towards their foreign classmates and then compare them with the perceived attitudes of foreign students. The research was based on an analysis of 224 questionnaires, it was carried out between November 2023 – February 2024 at Constantine the Philosopher University in Nitra, Slovakia.

First we examined Slovak students. We found out that Slovak students perceive that they have rather positive and friendly attitude towards their foreign classmates, they are open and also willing to help. They also expressed that they

are glad they have foreign classmates and that they often initiate the communication with them. However, when Slovak students were asked about the behaviour of Slovaks in general towards foreigners they expressed less positive or friendly attitude. They stated that Slovaks are rather unfriendly, distant and not willing to help foreigners in general. We found out that this negative attitude of Slovaks is mostly associated with older generation and our respondents consider themselves to be more open and positive towards foreigners. This fact was found out by many authors who also connect variable of age as being very significant when forming an attitude towards immigrants [Vašečka 2009], [Filipec et al. 2019].

The second part of our research was aimed at foreign students. We asked about perceived attitudes of Slovak students and also Slovaks in general towards them. Finally, we compared the two research groups. We selected certain factors such as friendliness, willingness to help, initiative in the relationship, interest in communication or avoidance of mutual communication. We also investigated other elements that reflected the attitude of Slovaks (not students) towards foreigners in general. The results show that Slovak students perceive their attitudes to foreign students to be more positive, friendly and open when compared with level of friendliness, willingness to help or openness perceived by foreign students. On the other hand, when we asked about attitudes of Slovaks (not students) towards foreigners, Slovak students consider Slovaks to have less positive and friendly attitude to foreigners than it was expressed by foreign students. As we stated earlier the difference between the perception of one's own attitude with the attitude of others can be explained by a tendency to interpret one's own behaviour more positively and see oneself in a better light than when an individual evaluates other people. For this reason, students consider themselves to be more positive towards foreigners compared to other residents of Slovakia. It is connected with a phenomenon known in psychology as social desirability bias – a tendency to provide a socially desirable response rather than true opinions. Nevertheless, the negative perception of the attitudes of Slovaks in general from the point of view of Slovak students seems not to be in line with the reality (or at least with the perception of foreign students) as the foreign students assigned much higher points for willingness to help as well as to positive attitude of Slovaks.

When we look at the responses to open questions, where we examined the causes of negative attitudes of Slovak students towards foreign classmates, we found out that many of Slovak respondents see the root of a negative attitudes in the negative personal experience with other foreigners from the same country (e.g. an

irresponsible approach of a foreign student to their studies). Responses of foreign students revealed the similar fact, they acknowledged that some of the foreign students might cause a negative reputation and an unfriendly behaviour of Slovaks towards them. One of the often cited cause of a reserved attitude was a language barrier. As we can see the reasons of negative attitudes toward foreigners correspond in both groups of respondents. We suppose that this negative attitude has its veritable causes and cannot be explained simply by the term prejudice.

At the beginning of our study we formulated 5 hypotheses, which were tested during the research. Our research confirmed all the hypotheses formulated at the beginning of the research.

Hypothesis no. 1: The assumption that there is a positive relationship between positive attitudes of Slovak students towards foreign students and the length of time they have known each other was confirmed.

Hypothesis no. 2: The assumption that there is a positive relationship between positive attitudes of Slovak students towards their foreign classmates and the ability of foreign students to speak Slovak or English language was confirmed by the research.

Hypothesis no. 3: We also predicted that there is not a relation between attitudes of Slovak students towards foreign students and the country of their origin, our assumption was confirmed by the research.

Hypothesis no. 5: The assumption that here is difference in the degree of positive attitude of Slovak students towards foreign students and perceptions of acceptance made by foreign students was confirmed.

The results of the hypotheses testing are based mainly on quantitative analysis, based on statistical processing of the collected data. Qualitative analyses of the open-ended questions provided deeper view into the causes of the researched issues and can be used to formulate further research questions in the following study.

As far as the practical value of our research is concerned we suggest that Universities with foreign students should focus on the adaptation process of foreign students and support it. We propose language courses for foreign students that would be offered by universities before the start of an academic year. Secondly, Universities should organize events that would encourage Slovak and foreign students to spend more time together thus supporting their mutual communication and relations.

Above research provided some view into a perception of acceptance of foreign students in Slovakia. The significance of the results might be reduced by selecting a

specific sample of foreign students who are in Slovakia for less than two years mostly and also by their possible language deficiency. Thus, repeated measurements would provide an opportunity to monitor the change of attitudes in the terms of time.

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CHALLENGES OF DEMOCRATIC SUSTAINABILITY OF MODERN GEORGIAN POLITICAL PARTIES: GOVERNANCE, HIERARCHY, IDEOLOGICAL FRAGMENTATION, AND ORGANIZATIONAL WEAKNESS

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Abstract

The article deals with the challenges of democratic sustainability of Georgian political parties in modern Georgia. It tries to reveal the main reasons why, according to some researchers, there is a crisis of intra-party democracy in the modern Georgian party system, why the state's drive towards democratic development has not been reflected in the organizational structure of parties. The article examines the challenges of leader hierarchy, ideological fragmentation, and organizational fragmentation in modern Georgian political parties using the conceptual framework of the theory of resource dependence and in-depth qualitative research methods.

Keywords: party system, party financing, state financing system, Georgia, elections, ideology.

INTRODUCTION

Political parties are one of the essential components of democratic governance [Sartori 2005]. As it is known, parliamentary governance is gradually being established in Georgia, and by 2024, there will be a fully proportional electoral system [Matsaberidze 2019]. Proponents of the mentioned changes support the idea of a multi-party parliament and forming a coalition government. Therefore, the importance of political parties in the political system of Georgia is growing even more. Naturally, the effective implementation of these changes requires institutionally and financially sustainable political parties, which enables the formation of coalitions and the implementation of coherent, substantive, and strategic policies. Accordingly, the unification of interests and the creation of policies by parties is one of the main challenges of the modern Georgian party spectrum [Kobalia 2020; Kakhishvili et al. 2021].

In Georgia, the issue of financing political parties from the state budget has always been a subject of discussion. Since 2008, the financing of parties has increased. The last changes were implemented in July 2020 (obtaining budgetary financing was simplified). The debates regarding the budgetary financing of parties became relevant again after the parliamentary elections of October 2020. According to the initiative of the ruling political team, a legislative initiative was presented, according to which political parties will have their budgetary funding suspended or terminated if they do not capture at least half of the parliamentary mandates [civil.ge 2020]. However, the state funding of political parties is still valid.

As it is known, parties have three primary income sources: membership fees, private donations, and direct and indirect ways of public funding [Nassmacher 2006]. It should be noted that in most post-communist countries, funding of parties from the state budget has been introduced. The share of state money in the party budget can be very high, approaching 70–80 %. Researchers argue that state funding jeopardizes the relationship between parties and civil society, creates distortions, and disadvantages smaller parties. The most frequently heard criticism is that state funding reduces the necessary motivation to establish party-society ties [van Biezen 2003]. According to the research conducted in Georgia, the primary source of financial income is state funding and donations from private businesses [Nodia and Scholtbach 2006]. As we can see, the state is trying to promote the development of political parties through budgetary financing.

Nevertheless, the question is: does financing parties from the state budget bring this result? Accordingly, the research aims to study the impact of the financing of parties from the state budget on the institutional sustainability of the modern

Georgian party spectrum and to determine the extent to which the mentioned law has fulfilled the set tasks. Therefore, the research question can be formulated as follows: To what extent does the increase in the specific share of state funding in the party's financial resources determine the institutional stability of the party and the democracy of internal party decision-making?

1. THEORETICAL FRAMEWORK AND METHODOLOGY

The scientific debates around political parties often refer to the tendencies of organizational development of parties and the search for the ideal type of intra-party democracy. Samuel Huntington defines institutionalization as the process by which organizations acquire value and stability [Huntington 1968]. Unlike Huntington, Taylor-Robinson notes that institutionalized parties do not necessarily guarantee democracy because: "Institutionalization implies order and stability more than democracy" [Taylor-Robinson 2001:582]; according to the author, the high degree of organizational development of the party is not a guarantee that the party shares democratic values. However, we may disagree with Taylor-Robinson because if party institutionalism means, among other things, the existence of democratic mechanisms for making internal party decisions, then an institutionally stable party system will also create guarantees for establishing democratic governance in the state.

Panbianko developed a concept that includes two principles to study the democratization and institutionalization of parties. First, the degree of autonomy of the organization and the internal structural coherence of the organization, which includes the centralized control of organizational resources and the process of exchange with the environment. More specifically, five indicators of party institutionalization are proposed and discussed: 1. The degree of development of the central parliamentary organization; 2. Degree of homogeneity of organizational structures; 3. How the organization is financed; 4. Relations with other parties; 5. Validity of the party charter [Panbianco 1988]. Kenneth Janda defined party institutionalization as "the representation of public interests by a party when the party exists as a social organization, and this organization exhibits recurring patterns of behavior" [Janda 1980:19]. In addition, Janda identified six institutionalization variables: year of party origin, name change, organizational change (party dissolution or merger), leadership competition, legislative instability, and electoral instability [Janda 1980]. Thus, Janda's approach seems to recognize the internal organizational component of institutionalization and the 'external'

component. While leadership competition refers to internal leadership selection procedures, legislative and electoral instability is due to an external dimension: the electorate's perception of the party as an institution.

Although the presented authors were one of the first to measure the institutionalization of parties, it is worth noting that they do not focus on such vital issues of internal party politics as the ideological stability of parties or the existence of democratic candidate selection mechanisms.

The theory of dependence on resources is attractive in terms of the sustainability of parties. According to this theory, because state funding is increasingly available to political parties in democracies, parties become more and more dependent on public finances [Silagadze 2020; Minesashvili 2022]. They become focused on maintaining funding, which creates new challenges in party politics [Gherghina and Volintiru 2023]. According to Nicole Beauliere, although parties are accountable to their voters and members due to receiving permanent state funding, parties are reluctant to change political courses, which distances them from the interests of voters [Bolleyer 2020]. Based on the above, the increase in the specific share of state funding reduces the amount of contributions, affecting the weakening of the party's structure [Bolleyer and Correa 2020].

Along with resource dependence theory, our research is based on the theoretical framework proposed by Susan Scarrow, Paul Webb, and Thomas Poughanck [Scarrow et.al. 2017]. The authors believe that the party's internal organization should be understood based on three dimensions: structural, resource, and representation. When studying the structural dimension, Scarrow et.al. first define the leader's autonomy within the party/the variable of the leader's limitation. In this regard, knowing the party leader's rights is essential. How does he make decisions? Is he an authoritarian sole ruler, or does he agree with other party members on his own decisions? The party's executive board or membership organization may limit a leader's autonomy. Conversely, leaders can be too autonomous and able to independently determine party policies and priorities, which weakens internal party democracy. Scarrow et al. also distinguish the criterion of coordination and entropy, which examines the extent of ideological or thematic consensus within the party and what is the consensus between the internal groups of the party.

As is known, modern parties consist of ideologically diverse members/factions, so if the party is fragmented and internal groups cannot agree on fundamental issues. We are dealing with disintegration/entropy, and if they can cooperate and maintain

the party's integrity, then there is coordination. According to research by Scarrow et.al. examining territorial concentration/dispersion is also essential in characterizing party structure. It means what is the distribution area of the party – is it concentrated in one city, or is it spread all over the country? According to the authors, the decentralization of parties often means their high democracy and structural stability [Scarrow et. al 2017].

Accordingly, to study the financial income of the parties, the secondary analysis of quantitative data is used in the research. To study the democratic challenges of the Georgian parties, the qualitative research method is used. In particular, content analysis of documents – to study the ideological foundation of political parties and party structure (including to determine the democracy/hierarchy of decision-making), party charters, and pre-election programs are analyzed. Also, a survey of experts was used in the research, within which targeted, non-probability sampling was used – in-depth interviews were conducted with researchers whose scientific interests included party politics. Within the research framework, ten experts were interviewed during 2021–2022, and respondents' ages vary between 45–70 years. The experts participating in the research have extensive experience researching Georgian party politics and intra-party processes, which became a prerequisite for obtaining valid information for this research. As for the selection, 2008–2020 was selected as the research period. Four parliamentary elections were held in this period [OSCE/ODIHR 2008, 2012, 2017, 2021], and therefore, the research includes those parties that received at least 1 % of the votes in the mentioned elections: 1. Georgian Dream – Democratic Georgia; 2. United National Movement; 3. European Georgia – freedom movement; 4. Alliance of Georgian Patriots; 5. Labor Party of Georgia; 6. Republican Party of Georgia; 7. Girchi; 8. Citizens.

2. DEPENDENCE ON STATE RESOURCES IN GEORGIAN PARTY POLITICS

Based on the fact that the research aims to explain to what extent the budget financing was able to achieve the set goal and whether it contributed to the formation of financially sustainable democratic party organizations, it is essential to review the budget financing received by the parties participating in the research and determine the degree of their dependence on the state. Data analysis from 2008–2020 reveals that the Labor Party of Georgia (LPG) is the most dependent on state funding. According to the revenues received by the LPG in 2008–2020 [State Audit Service 2020], the share of state funding in the finances of the LPG in 2008, 2009, 2015, and 2019 was 100 %. The party was unable to find an alternative source of

funding. The LPG received the largest private donation in 2012 in the form of 114,240 GEL. During an in-depth interview, the expert noted that “the Labor Party is a classic example of the fact that budgetary funding cannot ensure the development of small political parties; on the contrary, they become more dependent on the state” [Interview with expert No.3, 2021]. According to the data, the party received private donations one year before the elections or directly in the election year, which is to some extent a confirmation of the opinion that the parties are not involved in active political activities in the period between the elections and are active only in the pre-election period. In total, between 2008 and 2020, the LPG received more than 7 million GEL from the state budget, which is 96.74 % of the party’s income [Election Administration of Georgia 2020], which is the highest indicator of dependence on the state among the studied parties (see Figure 1). Accordingly, it should be noted that the budget funding contributed to the so-called ‘physical survival’ of the LPG. However, it failed to ensure the party’s financial stability and became utterly dependent on state resources. Despite many years of experience in managing the party organization, the party failed to develop a mechanism for membership contributions and was unable to attract private donor supporters to finance the party’s activities.

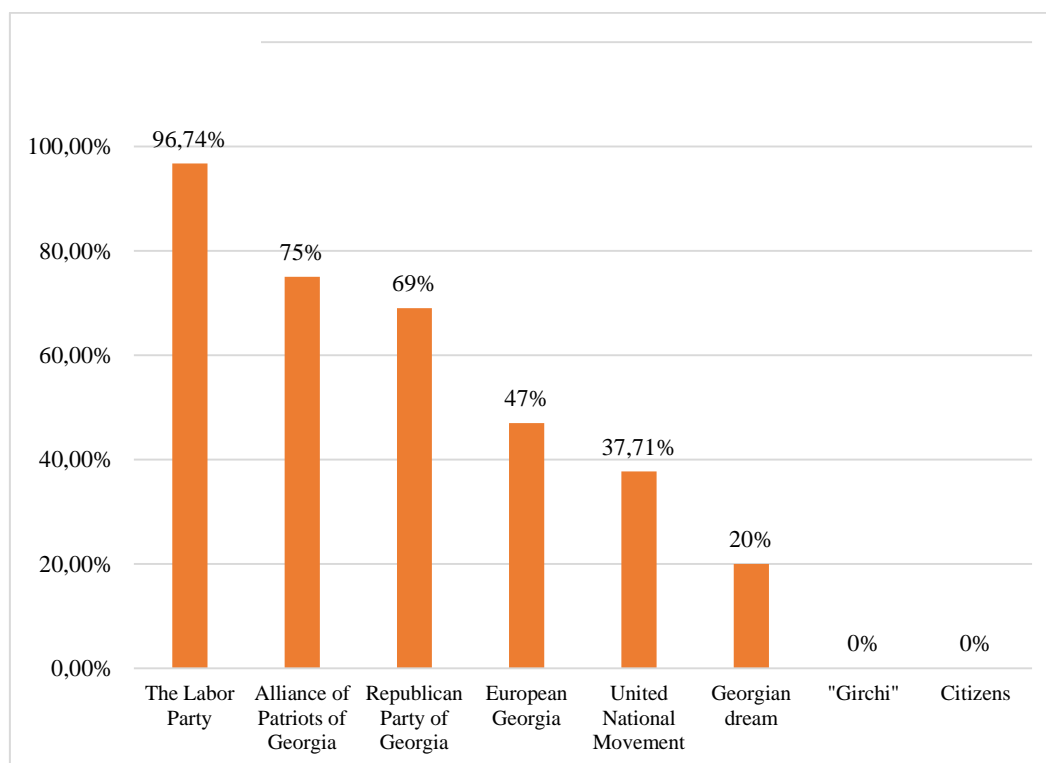


Figure 1. The share of budget funding in party revenues in 2008-2020 in %

Alliance of Patriots of Georgia (APG) also has a high dependence rate on state funding; according to the Figure 2, the specific share of state funding in the party's financial resources in the research period was 75 %. In 2016–2020, APG received 10,952,800 GEL income, of which 8,190,000 GEL was state funding. According to the trend, the private donations of the party increased in the election year, which is also confirmed in the case of the APG precisely in 2016 and 2020, when the party received the most significant number of private donations when the parliamentary elections were held. In connection with this, a researcher of party politics, an expert, during an in-depth interview, noted that the idea of state funding, along with other factors, aims to protect Georgian politics from foreign and mainly Russian money:

‘In some cases, the Georgian state should finance the parties rather than to seek alternative funding from Russia, but despite this, there are still big questions about the Alliance of Patriots because there is an assumption that they had much more income than they have presented in the declaration, and it is possible that it was Russian money [Interview with expert No.4, 2021].

The Republican Party of Georgia (RPG) has a higher-than-average dependence rate on the state. In 2008–2020, it received 6,369,084 GEL in the form of state and private donations, as well as membership fees. At the same time, 69 % of this income, 4,405,846 GEL, was government funding (see Figure 1). It should be noted that in 2008–2010, the party was almost entirely dependent on the state, and in these years, private donations did not exceed 1000 GEL. However, it should be noted that, unlike other parties, the RPG has established a voluntary system of membership fees, which, although not a large amount, is an attempt to establish the institution of intra-party membership. Despite the high rate of dependence on the state, in 2011–2013, this dependence decreased, and the share of private donations in the party's income increased, which is associated with the creation of a coalition between the GRP and Georgian Dream [Interview with expert No. 5, 2022]. It explains, for example, that in 2011, 86 % of the party's income came from private financing, and in 2012–2013, the RPG received a substantial private donation. Accordingly, during the mentioned period, the reduction of the party's dependence on the state did not cause the fact that the RPG was able to create a sustainable party structure and establish a close relationship with the voters, who started financing the party's political activities.

The political party European Georgia (EG) has a slightly lower-than-average dependence rate on the state. In 2016–2020, received a total of 8,329,060 GEL, 47 % of which 3,917,200 GEL is government funding (see Figure 1). In addition, at

the time of the party's creation, its dependence on the state was 100 %, and in 2018 and 2020, the dependence on the state was gradually decreasing, which is also explained by the election years. Accordingly, the case of EG proves that in non-election years, parties are entirely dependent on state resources, and they have no motivation to attract private donations or create a sustainable party structure and mechanism of membership contributions.

According to the research results, the United National Movement (UNM) ranks fifth among the eight political parties in dependence on state resources. The share of state funding in the total income of 2008–2020 is 37.71 %. The party has received 69,620,274 GEL, of which 26,255,910 GEL is government funding (see Figure 2).

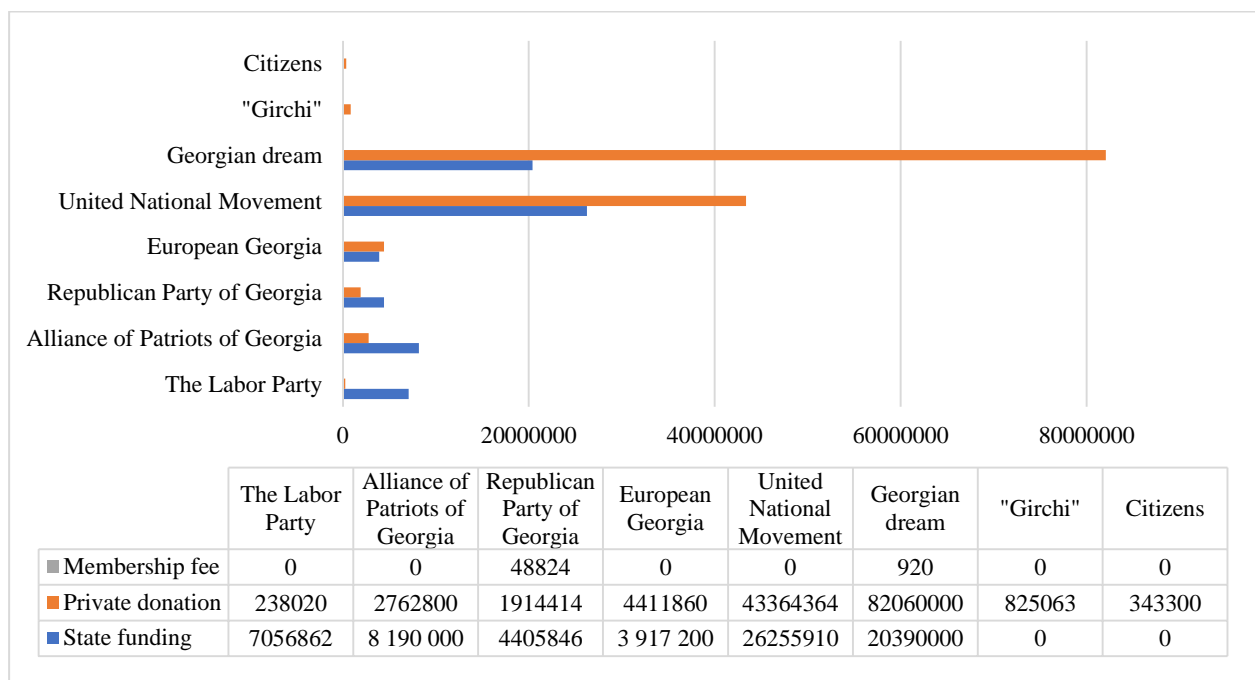


Figure 2. Total financial income of political parties in 2008–2020 in GEL

In addition, several general trends can be seen in the revenues of the UNM. Firstly, the party receives much more private donations during election years than during non-election periods. According to the second trend, the party received more private donations while in power and was less dependent on public funding than after it was in opposition. In 2008, when UNM was the ruling party, the specific share of the budget funding in the financial resources of the party was only 12.93 %; however, on the contrary, 14 333 017 GEL (87.07 % of the total income) was received by the party in the form of private donations. In this case, the imbalance between financial sources is evident.

Resource dependence theory focuses on the balance between alternative sources of income. During an in-depth interview, the expert noted that “like state funding, the party’s financial dependence on private donations may lead to the dependence of the party’s activities on not public but private interests, a clear example of which is Georgian political parties, which usually represent the interests of a certain business group” [Interview with expert No. 5, 2022]. In addition, it is worth noting that the UNM, like other parties, failed to establish a membership contribution mechanism and ultimately failed to diversify resources between state funding, private donations, and membership contributions, which indicates the low degree of financial independence of the party according to the theory of resource dependence. As a result of the research, the ruling Georgian Dream (GD) party, has one of the lowest rates of dependence on state resources. In 2012–2020, the party received a total of 102,450,920 GEL in the form of donations and funding, of which 20,390,000 GEL was state funding, which is equal to 20 % of the party’s financial resources (see Figure 2).

GD, as a government party, is characterized by an increase in the specific share of private donations in financial resources, especially in the years of parliamentary elections, for example, in 2012, the specific share of private donations in the party’s income was 84 %, in 2016 it was 91 %, and in 2020 the mentioned indicator It was 85 % [State Audit Service 2020].

As for the lowest rate of dependence on state funding, among the political parties that are the object of the research, there are only two political parties that, despite having the appropriate opportunity, did not receive state funding; these parties are Girchi and Citizens. In this case, Girchi has not established a system of membership contributions, hence, according to the theory of dependence on resources, although Girchi is not a political party dependent on the state, it is still unable to diversify its income and depends only on private donors. It at least creates challenges in terms of financial stability. As for the political party Citizens, it was created in the pre-election period in 2020 and received 343,300 GEL through private donations. The courage of minor parties to refuse state funding and conduct party politics independently is welcome. It should be noted that Girchi succeeded more or less and won more mandates in the 2020 parliamentary elections than the LPG, which exists with state funding.

As for Citizens, it is difficult to predict how much it will be able to ‘survive’ without state funding in the future. However, it is a fact that it will have more incentives to attract supporters [Interview with expert No.1, 2021]. Accordingly, as the research showed, during the years 2008–2020, state funding was the main and often the

only source of income for political parties. Even though since 2012, the financially solid GD appeared in the political arena as a competitor of the UNM, the primary source of funding for the parties remained the budgetary funding. LPG, RPG, APG, and EG still strongly depend on state resources.

3. DEMOCRACY/HIERARCHY OF INTERNAL PARTY DECISION-MAKING

One of the essential characteristics of the institutional stability of a political party in modern democratic political systems is the democratization of internal party decision-making. In this context, it is crucial that in the party organization, decisions are not taken alone or by a narrow party group, but party members also participate in this process using democratic mechanisms. One of the main challenges of the modern Georgian party system is the high degree of dependence on the leader. As a rule, political parties in Georgia were formed not around ideological values, but around personalities. Various studies confirm that voters tend to support one or another party not because of the program but because of the personality of the party leader [Gvindadze 2023; Kobalia 2020; Kakhishvili et al. 2021]. In this regard, the LPG, which received budgetary funding yearly during the research period and is one of the stable political parties in the Georgian party spectrum, is very attached to the leader. According to the party charter, democratic mechanisms for making and executing internal party decisions have been created, including the party having a congress composed of members, which elects the party's chairman by a majority of votes. The party has a national policy committee and a general council. The party also has a party control committee to avoid the balance of power in internal party governance [Labor Party of Georgia 2018]. Despite the declared existence of a balanced mechanism for making intra-party decisions, the party has not developed, for example, any mechanism for compiling the parliamentary list. In addition, the party charter does not specify the role of party members in the work process of the Congress, and the LPG has not developed a mechanism for developing a pre-election party program. The LPG is one of the good examples of parties created around the leader because there is no real democratic decision-making mechanism in the party.

As a rule, voters vote for the chairman of the party, Shalva Natelashvili [Interview with expert No. 2, 2021]. The fact that the party does not have an actual mechanism for the involvement of supporters and members in the decision-making process is also reflected in the party's election results. In most cases, it is difficult for the party to obtain parliamentary mandates. In addition, when we consider the autonomy

and limitations of the leader within the party, we should mention that Shalva Natelashvili was the first number on the party's parliamentary list in all four parliamentary elections from 2008 to 2020. Also, Natelashvili was the party's presidential candidate in all the presidential elections held during this period. Thus, despite the idea that budget funding has facilitated the development of institutional sustainability of political parties, it has failed to do so in the case of the LPG. Indeed, the party did not disappear from the Georgian political landscape, but it could not create a democratic mechanism for making intra-party decisions.

As for the APG, which also has a high rate of financial dependence on the state, 75 % of total income (see Fuguer 1), it is also characterized by a high dependence rate on charismatic leaders. However, unlike the LPG, the party has two prominent leaders, Davit Tarkhan-Mouravi and Irma Inashvili. In addition, an exciting manifestation of attachment to party leaders is the election ballots, where along with the name of the party, the names of its leader(s) are indicated [Interview with expert No. 4, 2021]. Although the APG has a party structure defined by its charter, which consists of a party congress and a political council [Alliance of Patriots of Georgia 2016], even in this case, the party does not have a detailed electoral list formation mechanism or the practice of considering the opinions of voters and supporters in the development of the party program. The APG is a party that likes large gatherings. However, not because they want to consider the opinion of voters and citizens in this process, but it is a kind of ritual of demonstration of strength, which Georgian parties inherited from the Communist Party [interview with expert No. 1, 2021]. Therefore, even in the case of the APG, state funding could not become the basis for the democratization of the governing structure of the party.

UNM and EG are exciting examples of the democratization of intra-party decision-making and the leader's autonomy. According to the UNMt charter, the party congress elects the political council of the party's executive body, which is authorized to present and approve the majority candidates and the electoral list [United National Movement 2013]. Accordingly, officially, the statute of the UNM does not provide for adopting party decisions. However, from 2008 to 2020, the UNM had some attempts to form intra-party democracy. For example, in 2013, the party held primaries across Georgia to select a presidential candidate, in which members of district organizations of the party could participate. In the last round of primaries, each polling station across Georgia could cast one vote (send one delegate to the Congress). In order to register as a delegate, the candidate needed to submit a list of 30 supporters [United National Movement 2013], according to the

principle of primaries, the National Movement led the local self-government elections in 2014.

Although this can be considered a positive fact, it should be noted that the UNM is also a party strongly dependent on the leader - Mikheil Saakashvili and the push to introduce primaries and other intra-party democracy mechanisms is also related to the forced departure of Saakashvili from active politics, because otherwise Saakashvili would probably have decided on the names of the candidates together with a narrow group of the party. However, “If we evaluate the primaries conducted by the party with strictly democratic criteria, it turns out that delegates often voted for candidates supported by party leaders, although the introduction of primaries is still a welcome practice, and in order to transform it into an effective mechanism, it needs to be used to select candidates for every election” [Interview with expert No. 2, 2021].

In addition, it should be noted that in the primaries conducted by the UNM, the candidates were the party’s leaders, and there was no pre-preparation period where an ordinary party member could put himself as a candidate in the primaries. Although the UNM is perceived as a party dependent on the leader (Saakashvili), experts distinguish it from other parties by the existence of intra-party leadership groups. In particular: “There are various influential groups in the National Movement that try to influence party decisions, which is not a fully democratic practice, but it differs from, for example, the Labor Party, where party decisions depend only on one leader” [Interview with expert No. 3, 2021]. It is also worth noting that in 2020, after the chairman Grigol Vashadze, left the party, the UNM used a poll conducted on social networks to elect a new chair, in which both party members and ordinary supporters could participate, which a step forward in terms of intra-party democracy. Despite the efforts of the UNM, the fact that a democratic decision-making system could not be established in the party is evidenced by the dissolution of the party in 2017, when European Georgia was separated from the UNM. In Western political parties, when there is disagreement, they do not dissolve because they have democratic mechanisms for eliminating disagreements [Interview with expert No. 3, 2021].

As for the internal party structure of EG itself and the procedures for receiving transfers, like other parties, the charter of EG establishes the elements of indirect (representative) democracy in the Congress and the United Political Council. In addition, their statutes emphasize the mechanisms to include representatives of regional organizations in the parliamentary list (European Georgia – Movement for Freedom 2017). It is worth noting that the party presented a proportional list

without numbering for the 2020 parliamentary elections in order to redistribute mandates based on the results of the elections. Based on the above, the UNM and EG are characterized by situational manifestations of institutional sustainability. It does not allow us to determine how the parties will select candidates or elect the party's chairman in the next election year. Therefore, institutional stability and intra-party decision-making challenges still exist in the UNM and EG, like other parties.

The RP, which ranks third among the research parties regarding financial dependence on the state (see Figure 2), is one of the oldest political parties in Georgia. According to the charter, like other parties, the highest body is the Congress. It elects the National Executive Committee, which manages the party's daily activities, prepares the pre-election program, and approves election candidates [Republican Party of Georgia 2015].

Despite this entry in the charter, the RP, like the LPG and the APG, cannot ensure the involvement of voters in the process of making internal party decisions, according to the expert. However, today, the party is no longer concentrated around one specific leader; this does not mean it is more democratic [Interview with expert No.4, 2022]. Therefore, despite the idea that budgetary funding would contribute to the development of institutional sustainability of political parties in the case of the RPG, it is true that the party did not disappear from the Georgian political landscape. However, it could not create a democratic mechanism for making internal party decisions and a sustainable party organization.

The GD has the lowest rate of dependence on state finances at 20 % among the research parties (see Figure 1). However, it still experiences a crisis in the direction of intra-party democracy. According to the party charter, the Congress of party members elects the party's political council and the party's chairman, who is the highest executive official [Georgian Dream – Democratic Georgia 2020]. According to the expert, despite the abovementioned, the party still needs an actual mechanism for involving party members or supporters in making intra-party decisions [Interview with expert No. 1, 2021]. Like other Georgian political parties, GD is a political party built around a leader, within which the hierarchy of decision-making is the main principle of this party's work [Ubiria 2018]; therefore, considering the authority of the party leader, it is explained why GD failed to democratize internal party processes. The situation is similar in the case of the political party Citizens, which does not even have a website on the Internet; therefore, its rules are not publicly available.

The party does not have any official intra-party democratic mechanism. As the experts point out, the party is wholly built around the charisma of its leader – Aleko Elisashvili [interview with expert No. 5, 2022]. The explanation may be that the party was created just before the last elections and does not have relevant experience in conducting party politics. The analysis of the intra-party processes of the seven political parties presented reveals that although the weak parties survived under state funding conditions, they could not develop the party structure. Despite the budgetary funding, the LPG failed to gain broad electoral support. On the contrary, the political party Girchi created intra-party democracy without budgetary funding, managed to attract alternative funding sources, and offered voters a sharply defined ideological program.

It should be noted that Girchi is the only one among the research parties that has a democratic mechanism for making internal party decisions. The party has created an electronic portal through which ordinary members can vote for the desired candidate and participate in forming the parliamentary list. However, it can also put themselves forward as a candidate [Girchi 2020]. In addition, the mentioned procedures are related to the accumulation of electronic currency introduced by Girchi, which gives the party members additional motivation to engage in party activities and make donations, which is the first precedent in the Georgian political space. Accordingly, the resource dependence theory explains the main challenges of the institutional sustainability of the modern Georgian party spectrum. Parties constantly receiving budget funding have become dependent on these resources and have lost the motivation to develop the party organization. The political party Girchi, which does not receive state funding, found more motivation to develop the party organization and involve members in the governance process to ensure the institutional and financial sustainability of the party.

4. IDEOLOGICAL STABILITY/AMBIGUITY OF GEORGIAN PARTIES

One of the visible challenges of the institutional sustainability of the modern Georgian party spectrum is the implementation of coherent, substantive policies. The research revealed that despite the declaration of ideological values by the parties, it is common to change economic or social views from year to year, and often, a party with the same ideological value promises voters radically different issues.

It is explained by the fact that Georgian parties were not created around values but were united around leaders. Also, voters do not have an order regarding ideological

values [interview with expert No. 6, 2021]. For example, the UNM, EG, the RPG, and the APG call themselves right-center political unions.

Against this background, often, the promises of the RPG are based on the ideas of a free-market economy and a secular state [Republican Party of Georgia 2008]. In contrast, the APG often promises voters an increased state role in the economy, protectionism, free health care, education, and the restoration of close ties between the church and the state [Alliance of Patriots of Georgia 2020]. Despite the similar ideological foundation, the UNM and EG broke up, which once again confirms the secondary nature of ideology for parties. In addition, for example, the UNM is characterized by frequent changes in ideological principles from year to year. When it was in power, it promised voters increased social programs and state-friendly economic policies [United National Movement 2008]. After switching to the opposition, the party promised the voters a minimalist government, implementing neoliberal economic and targeted social policies [United National Movement 2020]. Accordingly, it is clear how vague the perception of right-centrism is in the modern Georgian party spectrum. Also, parties' ideological affiliation does not determine their field of action. For example, in 2012, the RPG was in a coalition with the left-centrist GD and opposed the UNM, while in 2020, it united with the UNM against the GD.

As for the declared left-centrist political parties GD and LPG, first of all, it should be noted that despite the ideological proximity of these two parties, there is extreme polarization between them, which indicates the absence of a coherent and substantive policy in the modern Georgian party spectrum [interview with an expert No.4, 2021].

In general, labor parties in the world are unions of workers and trade unions, and therefore, have a relatively solid social base; however, in the case of Georgia, the Labor Party has not been able to establish a similar niche, and instead of ideological values, it is united around the personal characteristics of the party leader. In addition, despite the left-centrist ideology, the party, in its pre-election programs, often focuses on protecting right-wing national values, Georgian traditions, and national culture [Labor Party of Georgia 2012].

The ideological instability of the LPG is also manifested by changing economic visions from year to year. The party sometimes promises voters increased taxes for business and correspondingly increased social programs (in 2008), and sometimes supports reduced profit taxes and targeted social policies [Labor Party of Georgia 2020].

As for the GD, which is also a left-centrist political party united around its leader, in 2012, it promised voters the creation of a social state with universal welfare. However, in 2016, the party changed its economic views and emphasized a free-market economy and monetarism [Georgian Dream - Democratic Georgia 2016], which went beyond its declared ideological foundation. In addition, the party often uses right-wing populism when discussing protecting and saving the national identity, Georgian language, and culture.

As for the so-called ‘new’ political parties, such as Citizens and Girchi, it should be noted that there is a sharp ideological difference between them. According to the 2020 pre-election program, the ideological visions of ‘citizens’ are pretty vague. On the one hand, the party promises voters a free market economy, minimal taxes, and, on the other hand, increased social spending and universal education and health care [Aleko Elisashvili – Citizens 2020]. Like other parties, “Citizens” are less focused on adherence to ideological values because the mentioned party also united around the leader [interview with expert No. 5 and No. 2]. As for the political party Girchi, unlike other parties, it identifies itself as a libertarian ideologist and supports the idea of a minimalist government, according to which the government should only care about the protection of citizens’ safety, property, and freedom and the state should not interfere in the economy. In addition, the state should not plan health, education, sports, or culture policies because, according to the party’s view, the free market will regulate all of these [Girchi 2020].

Accordingly, in this situation, in the modern Georgian party spectrum, only the political party that can be called an ideologically stable party whose pre-election visions coincide with its declared ideological values is ‘recommended.’

However, in the case of Girchi, like other parties, the characteristics of personification were highlighted because, due to the personal alienation between the internal groups of the party, the party split into two parts. Despite the ideological stability, it was not possible to maintain unity.

According to Susan Scarrow, modern parties consist of ideologically diverse members/factions, so internal groups cannot agree on fundamental issues if the party is fragmented. We are dealing with disintegration/entropy, and if they can cooperate and maintain the integrity of the party, then there is coordination [Scarrow et.al 2017]. When a high rate of disintegration characterizes a party, its disintegration is expected, which happened in the case of the UNM, EPG, and Girchi.

Thus, even though the state spent a total of 69,935,818 million GEL in financing researched parties in 2008–2020 [Election Administration of Georgia 2020], it

seems that the parties did not use the mentioned financial resources to create sustainable party platforms, which is why leftist or rightist populist promises and inconsistent, irrelevant pre-election programs are often offered to voters, which makes political parties even more dependent on the influence of the party leader.

5. TERRITORIAL CONCENTRATION/DISPERSION OF GEORGIAN PARTIES AND BUREAUCRATIC STRENGTH/WEAKNESS

Research on the financial and institutional sustainability of political parties also includes an examination of the party's territorial concentration/dispersion [Rose and Mackie 1988]. Which means, what is the distribution area of the party? Is it concentrated in one city or spread across the country? Parties may serve voters who live primarily in rural areas, or they may focus on urban populations. It should be noted that territorial distribution affects the homogeneity of political competition within the country and serves the development of political involvement at the local level [Caramani 2004].

Accordingly, it is essential to analyze the challenges of Georgian political parties regarding territorial concentration/dispersion. It should be noted that among the political parties participating in the study, Girchi was the only party whose structure did not formally include the party's regional organizations. However, the party has developed an electronic portal through which it is possible to participate in the party's activities throughout Georgia. In addition, the party supports strengthening local self-government rights [Girchi 2020], although it does not outline a specific action plan in this direction. In addition, even though Girchi has efforts to be a party with intra-party democracy, it still finds it challenging to increase regional representation, and the primary human resources are still concentrated in the capital [interview with expert No. 2, 2021].

Issues related to decentralization and the development of local self-government cannot be seen in the pre-election programs of the UNM (2008–2020). However, despite this, the party has a regional representation and a network of party coordinators throughout Georgia, which is an essential force in the pre-election process, and the party has about 80 regional organizations, each of which has a chairman and members [United National Movement 2020]. In addition, according to the party charter, the goal of the city and district organization is to spread the party's main visions and tasks at the local level [United National Movement 2013]. Therefore, it is clear that we are dealing with something other than a territorial and decentralized political party, but a strictly central political party that has specific mechanisms of spreading influence at the local level.

Local party organizations are not involved in the internal party decision-making process of the National Movement, which is one of the main challenges in bringing local problems to the central level. It should also be noted that even though the party has a vast network of coordinators and offices, the mentioned resource is often used only in the pre-election period and not in the party's daily activities (interview with expert No. 1, 2021). Therefore, the party is not based on the system of governance from the periphery to the center, and often, initiatives and decisions are made only at the central level.

As for the GD, like the UNM, it also has a network of party offices and coordinators throughout Georgia. It can be explained by the fact that both parties have the appropriate financial resources to ensure the mobilization of human resources at the regional level before the elections because they have representation in local self-government bodies. Often, the parties' district organizations and city council members are the same persons [interview with expert No. 2, 2021]. Even in the case of the GD, despite its broad regional representation, the party does not have an actual decentralization mechanism through which local-level party organizations would significantly contribute to party politics. However, the party actively supported the development of local self-government in the pre-election programs of 2012–2020. Such governance practices were not introduced within the party, as evidenced by the party charter, which does not assign essential functions to local-level organizations in developing local or national policies and party activities [interview with expert No. 4, 2021].

In pre-election programs, the ideas of self-government and decentralization were actively supported by the RPG, although the involvement of local-level district organizations in the process of the party's activities is less noticeable [interview with expert No. 4, 2021]. It is also worth noting that "Citizens" do not have local-level organizations, which is explained by the fact that the party was created only in the run-up to the 2020 elections. According to the expert, the fact that parties are created around the leader also reduces their motivation to create a truly decentralized party organization [interview with expert No. 3, 2021].

As for the APG, the party, in its pre-election programs, does not emphasize the importance of decentralization, and in the charter, there is no fundamental record of the role of local organizations in the party's structure. In general, the APG often holds protest rallies in different cities of Georgia, and the party has coordinators in different regions. However, the duty of these persons is not to bring local problems to the central office but to implement the decisions made at the center on the spot.

EG also has a similar system, which formally asserts the role of local organizations in managing the party's activities at the charter level. However, at the actual level, it is rarely implemented in practice. Accordingly, despite some efforts, the modern Georgian party spectrum is characterized by geographical concentration, which makes the party organization dependent on the central ring.

Thus, the geographical distribution and decentralization of political parties in 2008–2020 is one of the main challenges of institutional sustainability. Political parties have failed to decentralize their internal party structure, and power is often in the hands of a central party leader or a small privileged group.

CONCLUSION

Thus, as a result of the research, it was revealed that despite the increase in financing of political parties from the state budget from year to year, the absence of an ideological profile and consistent policy is one of the essential characteristics of modern Georgian parties. In the context of the Resource Dependence Theory, in the example of Georgian political parties, it was revealed that the more the specific share of state financing in the party's financial resources increases, the less the party's institutional stability and democratic development.

Data analysis revealed that parties with a high degree of financial dependence on the state (Labour Party, Republican Party, Patriot Alliance) face more challenges in terms of institutional sustainability. The analysis of the intra-party processes of the eight political parties included in the study shows that in the conditions of state funding, small parties 'physically survived,' but in the conditions of receiving guaranteed funding, they lost the motivation to form a powerful party organization. It is not worth the risk for parties to offer different visions or policies to their voters for fear of losing the minimum stable electorate through which they constantly receive state funding.

In contrast to this, the political party Girchi, in the absence of budgetary funding, created mechanisms of intra-party democracy, managed to attract alternative funding sources, and actively lobbied for the issues desired by the party's supporters in the period between elections. Thus, discussing the financial instability in the modern Georgian party spectrum leads to the problem of institutional stability of parties.

Despite increasing state funding, parties lack established democratic decision-making mechanisms, exhibit a high degree of dependence on the leader, lack consistent and consistent ideological values, and fail to provide voters with coherent,

substantive policy proposals. They do not have alternative sources of financial income, which is related to the bureaucratic weakness of the parties. In the conditions of dependence on state resources, the parties do not have the proper motivation to form a strong party organizational structure, which is one of the main challenges of the modern Georgian party spectrum regarding institutional sustainability.

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GOVERNMENT POLICY TOWARDS EUROPEAN INTEGRATION AND ITS FEATURES IN GEORGIA, ARMENIA AND TÜRKİYE

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Abstract

This article explores government policies toward European integration in Georgia, Armenia, and Türkiye, focusing on their unique challenges. Despite public support, Georgia faced setbacks as the EU suspended its accession due to government stances and a policy design-implementation gap. Türkiye, hindered by internal human rights issues and freedom restrictions, faces policy conflicts stemming from political turbulence and EU criticisms. Armenia's situation is complex, Armenia

seeks EU alignment through democratic reforms while maintaining ties with Russia but faces capacity and security challenges. The study presents detailed analyses of these three cases using document analysis and expert interviews.

Key words: EU expansion, EU accession, Government actions, Foreign policy, Europeanisation.

INTRODUCTION

The government policy towards European integration remains highly relevant in international academia and national scholarly discussions. Also, international society demonstrates a profound interest in the enlargement of the European Union.

This research aims to study the pivotal features of government policy towards European Integration in Georgia, Armenia, and Türkiye, each presenting a unique case in its relationship with the European Union. The article examines the government actions and policies in the mentioned states, focusing on the design and implementation of these policies, including laws, government ordinances, and decrees. By analysing the efforts made by these governments in the context of European integration, this research seeks to provide a comprehensive understanding of the actions they have employed, the challenges they face, and the outcomes they have achieved.

The study involves an in-depth examination of documents coupled with expert interviews that enrich the empirical and explanatory parts of the research. This study is based on three distinct cases, selected through purposive sampling to highlight the features of European integration among the countries: 1) Georgia, which holds candidate status, 2) Armenia, a country that has recently exhibited clear European aspirations despite its complex historical relationship with the EU and 3) Türkiye, with its frozen candidate status. The paper answers three questions: What are the pivotal features of government policy towards European integration in Georgia, Armenia, and Türkiye? What factors determine these policy features in each of the three countries? And what challenges are identified in the context of Euro integration according to the government policies in these states?

The article is organised into several parts: the first part presents a literature review that provides the theoretical foundation for the study. The subsequent three parts each focus on the government policies towards European integration and their specific features in Georgia, Armenia, and Türkiye, respectively. Finally, the last part of the article presents the main findings, offering a conclusion that synthesises the insights gained from the research.

The research adhered to ethical standards by following the five guiding principles of the American Psychological Association (APA), ensuring informed consent from all respondents. Personal beliefs and opinions were not disclosed during the interviews, maintaining objectivity and impartiality. Data from participants is represented with appropriate anonymity protection. All sources and documents used in the study were obtained following relevant intellectual property rights.

By employing social science qualitative research methods, including document analysis and in-depth interviews with experts, this study provides a nuanced and detailed examination of the cases. Through its comprehensive analysis, the article contributes to a deeper understanding of the features and challenges of Euro-integration in these countries, offering insights for both scholars and policymakers engaged in the field.

1. LITERATURE REVIEW

Since gaining independence (1991), Georgia has undergone a significant transition. Historically part of Europe, the country shares common European values and identity. As former Prime Minister Zurab Zhvania once said upon Georgia's accession to the Council of Europe: "I am Georgian, therefore I am European" [Kapanadze, 2004; Mestvirishvili & Mestvirishvili, 2014; Tsintskiladze, 2019]. Despite the current situation, where the ruling party 'Georgian Dream' adopts an ambivalent and increasingly Eurosceptic stance, these words still reflect the Georgian people's commitment to EU integration. Georgia's official relationship with the EU began in 1992 when Georgia regained its independence after the collapse of the Soviet Union. After this, The European Commission (EC) established its Delegation in Tbilisi, Georgia, in 1995 [Chitadze, 2014]. On April 22, 1996, the Partnership and Cooperation Agreement (PCA) between the European Union and Georgia was signed in Luxembourg. The agreement aimed to enhance political dialogue, support Georgia's democratic and economic development, promote harmonised economic relations, and provide a framework for cooperation across multiple sectors [Gabrichidze, 2014]. On February 17, 2004, the Georgian government established the post of State Minister for Integration into European and Euro-Atlantic structures, marking a significant step towards deeper ties with the EU. This effort led to Georgia joining the EU's Neighborhood Policy on June 14 of the same year. On November 14, 2006, the EU-Georgia European Neighborhood Policy Action Plan was adopted, setting eight priority areas for reform over five years. Unlike Ukraine and Moldova, Georgia's plan emphasised democratic development, justice, governance, poverty reduction, economic and social policy,

migration, cross-border crime, foreign policy, security, conflict resolution, energy, transport, environment, culture, education, and science [Eisele & Wiesbrock, 2011]. In 2009, the Eastern Partnership was launched, allowing Georgia to deepen its bilateral relations with the EU. This led to the adoption of the EU-Georgia Association Agenda in 2014 [Torun, 2019]. Despite government changes since independence, the goal of joining the EU and NATO has consistently remained a top priority [Chochia, 2013]. During this period, Georgia benefited from political, administrative, and economic support from the EU. Additionally, the EU played a crucial role in strengthening civil society and supporting Georgian democracy and governance, particularly following the Rose Revolution [Khuroshvili, 2021]. After this was The Association Agreement (AA) on 27 June 2014, and Georgia managed to sign it [Morari, 2014]. The AA between the European Union and Georgia seeks to strengthen political and economic connections, improve democratic governance, enable economic integration, support sectoral collaboration, and aid in aligning Georgian reforms with EU standards [Fix, 2014; Kawecka-Wyrzykowska, 2015; Irena & Markozia, 2015]. Since 2014, following the Association Agreement, Georgia has implemented significant reforms, including anti-discrimination and anti-corruption measures, and included European and Euro-Atlantic integration in Article 78 of the Constitution of Georgia. However, since 2022, anti-European rhetoric has intensified, and the government's stance has become more ambivalent. Although outwardly pro-European, Georgian authorities have increasingly opposed EU actors, with this opposition becoming more aggressive following Russia's invasion of Ukraine [Tsuladze, Abzianidze, Amashukeli, & Javakhishvili, 2024].

The years 2023–2024 have seen the largest waves of protests in Georgia, known as the Gen-Z protests. Several hundred thousand citizens opposed the “Law on the Registration of Foreign Agents” and the Law of Georgia on the transparency of foreign influence. In the first instance, the parliament withdrew the law. Due to the stability of the situation and the efforts of the Georgian people, civil society, and the President, Georgia was granted candidate status for the European Union. In the second case, one year later, the Parliament of Georgia adopted the law in its third reading on May 28, 2024. This so-called “Russian Law” aims to undermine Georgian civil society and the non-governmental sector, distancing Georgia from its pro-European aspirations [IDFI 2022; 2023].

Armenia's government policy towards European Integration has become a focal point of academic inquiry due to the country's strategic position between Europe and Asia amidst shifting geopolitical dynamics. This literature review aims to

synthesise key themes, debates, and trends in understanding the pivotal features, determinants, and challenges of Armenia's government policy towards European Integration. Scholars have highlighted the intricate challenges Armenia faces in navigating its foreign policy orientation amidst competing pressures from the European Union and Russia. [Paronyan H., Elamiryan R., 2021] emphasise the complexities of Armenia's multi-vector foreign policy strategy, while [Terzyan A., 2019] underscores the constraints posed by Russia's continued economic and political influence on Armenia.

The literature explores Armenia's government policy toward European Integration, shaped by geopolitical factors, historical ties, economic dependencies, and domestic politics. Armenia seeks to align its legislation with European standards to enhance economic autonomy and EU relations [Paronyan H., Elamiryan R., 2021]. Positioned between the EU and Russia, Armenia balances its foreign policy through a multi-vector approach [Paronyan H., Elamiryan R., 2021; Aliyeva A., 2022]. Despite tensions, Armenia engages in both Eurasian and European integration models, joining the Eurasian Economic Union (EAEU) while negotiating the Comprehensive and Enhanced Partnership Agreement (CEPA) with the EU [Terzyan A., 2020; Khvorostiankina A., 2021].

Several studies highlight the challenges and constraints faced by Armenia in its pursuit of European integration. These include tensions between the EU and Russia, Armenia's membership in the EAEU, and the legacy of historical alliances. [Terzyan A., 2019] underscores the challenges posed by Russia's economic and political grip on Armenia, hindering the effective implementation of European integration policies. Influential studies by authors such as Aram Terzyan, Hayk Paronyan, and Chiara Loda [Loda, C., 2017] have provided comprehensive analyses of Armenia's foreign policy choices, shedding light on the complexities of EU-Armenia relations. Despite these issues, the literature also identifies opportunities for Armenia to deepen its engagement with the EU. The Eastern Partnership framework is seen as a platform for Armenia to enhance cooperation with the EU while maintaining its ties with Russia. [Paronyan H., Elamiryan R., 2021] suggest that Armenia's commitment to European standards in specific areas signals a desire to increase economic autonomy and strengthen relations with the EU. While existing scholarship provides valuable insights, gaps remain in understanding the nuanced dynamics of Armenia's integration process. Further research could explore the role of domestic political actors, civil society organisations, and public opinion in shaping Armenia's foreign policy orientation. Additionally, examining the impact

of recent geopolitical developments, such as the Nagorno-Karabakh conflict, on Armenia's European integration efforts could enrich the scholarly discourse. Limited focus on specific policy instruments and their impact on EU-Armenia relations, as well as the perspectives of various stakeholders, presents opportunities for further research [Terzyan A., 2020; Khvorostiankina A., 2021]. Thus, the literature reviewed highlights the complexities, determinants, and challenges of Armenia's government policy towards European Integration while acknowledging persistent opportunities and gaps for future inquiry.

In the last fifty years, Türkiye's integration with Europe has significantly shaped its foreign policy, with its pursuit of full EU membership driving political, economic, and societal transformations. Academic studies in this field emphasise Türkiye's longstanding interest in European integration, dating back to the Republic's establishment [Ercan, 2021, p.78]. The concepts of the West and Europe have always guided Türkiye's goals since its foundation, and since the War of Independence, the Republic of Türkiye has advocated a Western-oriented foreign policy axis [Turan, 1998, p. 303]. Following World War II, Türkiye aimed to strengthen its presence in Europe by joining international organisations like the Council of Europe in 1949 and NATO in 1952. Türkiye's 1959 application for association with the European Economic Community is often cited as a key step in its European integration [Yolcu, 2008, p. 37].

Existing literature emphasises milestones in Türkiye's European integration process that influenced government policies. Key turning points include the Ankara Agreement (1963), the Additional Protocol (1975), the Association Council Decision (1995), and the start of EU accession negotiations (2005) [Bilici, 2006, p. 44 & Sönmez, 2018, p. 154]. The year 2005 is noted as a milestone in the full membership and integration process [Ökmen & Canan, 2009, p. 143 & Çokoğullar & Bozaslan, 2017, p. 198]. Studies highlight various obstacles, such as Türkiye's size, prejudices, double standards, and the Cyprus issue, which have disrupted and slowed the process [İnaç, 2016, p. 230]. Additionally, domestic political events, including historical military coups, have strained relations between Türkiye and the European Union [Çalış & Metkin, 2017, p. 14].

During the Justice and Development Party (AKP) period, the Turkish government pursued reforms to harmonise with EU standards, enacting new laws in line with the Copenhagen political criteria [Efe, 2012, p. 153] and consulting institutions aligned with EU norms [Kaya, 2011, p. 78]. Between 2013–2017, the Syrian refugee crisis notably influenced government policies towards European integration, with

Türkiye's efforts shaped by the influx of refugees and a perceived lack of full EU support [Ercan, 2017, p. 19]. Since 2017, Türkiye's volatile relationship with the EU and its evolving government policies persist. Despite extensive studies, the literature generally does not provide detailed information on the most recent government policies or the underlying dynamics that have guided Türkiye's integration efforts over time.

2. GEORGIA IN FOCUS

Article 78 of the Constitution of Georgia declares that constitutional bodies shall take all measures within the scope of their competencies to ensure the full integration of Georgia into the European Union and the North Atlantic Treaty Organization [Constitution of Georgia, 1995], although the fact is separate. With what efforts the government is trying to achieve the latter.

The interviewed experts have critical assessments in this discourse: *“The main feature of the government policy in the direction of European integration in Georgia is to bring the legislation and bureaucratic system as close as possible to the European model, which in many cases is not perceived as a serious step by the population, since in practice there are problems with the implementation of the legislation and in many cases the lack of political will. As a result, we get changes that have only a small impact on the country's European integration process” (Expert, 1).*

“Unfortunately, the implementation of such reforms that contribute to the creation of a strong and democratic government, which in turn is a step forward in the European integration process, has been neglected” (Expert, 3).

“We have seen numerous examples of attacks on civil society, NGO sector, political parties and media and restrictions on their activities, which makes us think that the country's democratic course has been completely changed. It is also worth noting the attitude of the Georgian government regarding the criticism from the European Union, which makes us think that the European integration is less of a priority for the ruling party today” (Expert, 2).

On 23 June 2022, the European Council recognised the European Perspective for Georgia. The European Union outlined twelve key recommendations that Georgia needed to implement to achieve candidate status. These recommendations focused on addressing political polarisation by encouraging cross-party cooperation, ensuring the full functionality and accountability of state institutions, and strengthening democratic oversight. Additionally, Georgia was urged to reform its judicial system to guarantee independence, accountability, and impartiality and to

tackle high-level corruption by enhancing the independence of its Anti-Corruption Agency. Other priorities included combating organised crime, safeguarding media freedom, and ensuring the protection of human rights, particularly for vulnerable groups. The EU also mentions the importance of involving civil society in decision-making and ensuring that Georgian courts consider European Court of Human Rights judgments. Finally, the process for nominating a new Public Defender was to be transparent and independent, reinforcing the institution's autonomy. These measures were aimed at aligning Georgia with European standards and advancing its path toward EU membership [European Commission, 2022].

“In 2022, when the European Union limited itself to the European perspective for Georgia and did not give it the status of a candidate out of the associated trio, it caused heavy passions in the society, a feeling of hopelessness and a kind of depression” (Expert, 1). “It was as if there was a consensus in the nation that we had to do everything we could to get candidate status, and that meant fulfilling these 12 priorities as well” (Expert, 3). “The government took steps as if it knew very well that the fulfilment of these 12 points was the order of the society. This process was actively advocated by the president and civil society” (Expert, 2).

On November 8, 2023, the European Commission recommended granting Georgia candidate state status, influencing the European Council's upcoming decision. However, the recommendation included reservations tied to the June 2022 European Commission conclusion. As part of the 2023 enlargement package, the European Commission's detailed report assessed Georgia's current situation and progress.

Out of 12 priorities, the European Commission determined that Georgia fulfilled 3 of them, which were related to the election of the public defender, proactive consideration of the decisions of the Strasbourg court by the Georgian court, gender equality and violence against women.

The report evaluated the implementation of 12 priorities. Key findings included the need for reduced political polarisation, improved cooperation with opposition parties, and enhanced parliamentary oversight. While some judicial reforms and legislative changes were recognised, further comprehensive reforms, especially regarding the Supreme Court and the Prosecutor General's appointment, were deemed necessary.

Anti-corruption efforts were noted, but the independence of related institutions requires strengthening. The report notes the importance of continuing de-oligarchisation efforts with broad involvement. Progress in fighting organised crime

was acknowledged, but more work is needed, particularly in implementing Moneyval recommendations.

Media freedom remains a concern, with recommendations for ensuring regulatory independence and protecting journalists. Human rights protection, especially for vulnerable groups, must be enhanced, with attention to recent legislation potentially limiting assembly rights. Finally, the involvement of civil society in decision-making should be strengthened, ensuring their effective participation in policy-making processes [IDFI, 2023].

The experts interviewed by Beside This noted that: *“There is a serious problem between declared policy and its practice, for example, the association agreement mentions education and youth development and promoting their involvement in political life, although we have seen in the last 2 years that the government does nothing more than marginalise youth and confront them”* (Expert, 3). *“In general, it is typical for Georgia to declare ambitious values and goals, the latter is done as if to show the government to its partners that we truly want to do something, although the implementation part is often completely inappropriate, and an example of this is the anti-discrimination law and its practice, which does not protect the rights of minorities in any way today”* (Expert, 1). *“Also, when we talk about the implementation of the remaining 9 priorities out of 12, where de-oligarchisation is declared as a priority, how can it be implemented when the honorary chairman of the ruling party is an oligarch himself? Or how should judicial reform be implemented when the people who are supposed to implement it today are themselves clans? And this has been a rooted problem in the judicial system for years”* (Expert, 2)

Expert evaluations point to a gap between policy design and its implementation, which may be explained by the type of Georgian political and administrative culture. Several problems were not included in the report of the European Commission, although the remaining nine priorities reflect public and most pressing issues, the fulfilment of which is a pre-requisite for European integration.

Also, one of the experts mentioned the case when the government's ambivalent positions and propaganda seriously misled the citizens, and as a result, the Georgian dream kept the electorate. A relevant example of this is their communication language, style and content in the last two years, which are widely distributed among the population through social networks and banners.

One of the main slogans of the Georgian Dream is “To Europe with dignity”. With this, the ruling party confuses the population and openly rejects the pro-Russian aspiration. However, this “Dignity” implies non-interference in internal political

activities by the European Union, neglect of minority rights, and discrediting of civil society and opposition parties. Also, two concepts are often brought to the Georgian dream and their representatives in the same discourse: tradition and family. They try to validate and justify their policy actions with the motive of protecting the said non-formal institutions. Also, the recent steps of the ruling party serve to polarise the society and divide society.

For the parliamentary elections of October 26, 2024, the main slogan of the Georgian Dream is: Only with Peace, Dignity and Prosperity To Europe. The latter is also an ambivalent statement, where the political party tries not to lose the pro-European voters, although he introduces the concept of “Peace”, which in this context means that outside forces and the opposition encourage war in Georgia and the opening of a second battlefield. The party claims that it is the only guarantee that war with Russia will not happen. Also, this application is a message to their “traditional” voters that the ruling party wants to join the European Union only with the guarantee of these three concepts. Therefore, if there is no Peace, Dignity and Prosperity, integration into the European Union is refused by the Georgian Dream, and here, Prosperity is a relatively low-key message with no subtext. It is with these tools that the ruling party tries to maintain power, which is far from European values.

Parliamentary elections on October 26 turned out to be a turning point in EU-Georgia relations. “The mentioned election was conducted with irregularities, and there are serious doubts about its falsification, which is being discussed” (Respondent, 1 and 3).

It should be noted that the results of the elections had a large margin of error compared to the election exit polls, which had the lowest margin of error in previous years. For example, as a result of the exit polls conducted by Harris X, “Georgian Dream” received 42 %, and the opposition (4 political parties/coalitions) received 48 %. And according to Edison Research, the “Georgian Dream” – 40.9 %, and the opposition – 51.9 %.

Based on the official data of CEC (Election Administration of Georgia), the ruling party gathered 53,932 % of the votes, unprecedented in recent Georgian history, while the opposition got 37,791 %.

In the first days, the election results were not recognised by the President of Georgia and the opposition, as well as by a large part of the international community.

The winning party received congratulations from only five countries (Türkiye, Armenia, China, Azerbaijan, Hungary, Venezuela), of which 3 are neighbours and 2 are pro-Russian states.

The leader of Hungary, Viktor Orbán, paid an official visit to Georgia on October 28–29 (2024) to strengthen the legitimacy of the ruling party, but following this, Joseph Borrell noted that the Prime Minister of Hungary does not represent the position of the EU during the visit. Against this background, on October 30, the European Union officially suspended Georgia's accession. The report on EU enlargement with Georgia shows a setback in 4 out of 9 steps. The report mentions that “instead of carrying out the necessary reforms, the policy of the Georgian government has caused serious damage to the country's European integration process”.

On November 8 of the same year, Charles Michel stated that there were serious doubts regarding fraud in the elections held in Georgia, which required an investigation. The leaders of France, Poland and Germany also noted, “Until Georgia changes its current path and shows efforts to carry out tangible reforms, we will not support the start of EU accession negotiations with Georgia”.

On November 28, 2024, Irakli Kobakhidze declared: “We are a proud and self-respecting nation with a great history. Accordingly, it is categorically unacceptable for us to consider integration into the European Union as a mercy that the European Union should give us. We see that European politicians and bureaucrats are using the allocated grants and loans for blackmail against Georgia. Today, we have decided not to put the issue of opening negotiations with the European Union on the agenda until the end of 2028. Also, we refuse any budgetary grant from the European Union until the end of 2028”.

On the same day, the European Parliament adopted a resolution deeming the parliamentary elections held on October 26 fraudulent, refusing to recognise their results and calling for sanctions against the leaders of the “Georgian Dream” [European Parliament, 2024]. These developments triggered the largest wave of public protests in the country's history since independence, occurring spontaneously without formal organisation. The protests resulted in widespread strikes, disruptions in the cultural and educational sectors, mass resistance among public servants, and a systemic breakdown of public administrative functions [Khuroshvili, 2023].

Despite using severe measures—including physical punishment, arrests, and violent crackdowns on peaceful demonstrators—Georgian Dream failed to suppress the ongoing pro-European protests. As of December 18, 2024, the demonstrations persist, underscoring deep public dissatisfaction with the government's decisions and emphasising the pro-European aspirations of the Georgian people.

3. ARMENIA IN FOCUS

The EU's interest in the South Caucasus emerged after the collapse of the Soviet Union. While Armenia-EU relations have generally been stable, European integration has never been a political priority due to Russia's influence. In 1996, Armenia and the EU signed the Partnership and Cooperation Agreement (PCA) [Kostanyan H., Giragosian R., 2017, p. 4], marking the start of bilateral cooperation. Armenia later joined the EU's Neighbourhood Policy through the Eastern Partnership. Negotiations for an Association Agreement, including a Deep and Comprehensive Free Trade Area agreement (DCFTA), began in July 2010 to replace the old PCA. However, in 2013, Armenia decided to join the Eurasian Economic Union [Paronyan H., Elamiryan R., 2021, p. 260]. The Nagorno-Karabakh conflict, alongside Russia's broader political influence, has posed key challenges for bilateral relations. After the Velvet Revolution in 2018, there was renewed hope for EU integration, driven by reforms and the government's new approach. Relations deepened further after the Second Karabakh War.

Expert 1, whom we interviewed based on qualitative research, explains the most significant features of Armenia's government policy towards European integration:

"I want to focus on what I think are the two most significant aspects and/or contexts of the EU-Armenia relationships: 1) Armenia's long-term attempts to balance its relationships with Russia and the EU and 2) Armenia's significant democratisation after the 2018 Velvet Revolution... Armenia's post-2018 democratisation has opened the possibility for Armenia to reconsider its relationships with Russia, especially after the 2020 Second NK war particularly".

Since 2014, Armenia's membership in the Eurasian Economic Union and its involvement in the Collective Security Treaty Organization (CSTO) [Terzyan A., 2019, pp. 99] highlights its strategic alignment with Russia. Armenia also maintains a military agreement with Russia, its primary trade partner. Historically, its attempts to balance relations faltered in 2013. After negotiating an Association Agreement with the EU, including the DCFTA, President Serzh Sargsyan announced in Moscow that Armenia would join the Russia-led Customs Union, precluding the signing of the agreement due to regulatory incompatibilities. This marked a significant setback in Armenia-EU relations, and it took several years to renegotiate a new framework. The result was the Comprehensive and Enhanced Partnership Agreement (CEPA) in November 2017. While CEPA promotes democratic principles, its scope is less ambitious than the original Association Agreement. Following the 2018 Velvet Revolution, Armenia initiated democratic changes and a soft EU

integration process, with the Prime Minister building closer relations with European leaders.

Expert 1 noted: *“For example, the Netherlands opened an embassy in Yerevan right after the revolution, justifying its decision by the need to support the revolutionary government’s ‘modernising’ efforts and ‘fighting corruption’. The US invited Armenia to the 2021 and 2023 Summits for Democracy, despite Armenia’s strategic partnership with Russia. According to a resolution passed in January 2022 by the Parliamentary Assembly of the Council of Europe, ‘Armenia has made marked progress in its democratic development since 2018’. One co-rapporteur of the resolution announced that Armenia is a shining star of democracy in the region”.*

Democratic reforms have fostered closer ties with the EU and prompted a reassessment of Armenia’s relationship with Russia. In a statement to the EU Parliament, Prime Minister Pashinyan expressed Armenia's readiness to strengthen ties with the EU “as much as the European Union considers it possible” [Pashinyan, 2023]. Following this, Armenia's foreign minister revealed that discussions on EU membership were gaining traction [Politico, 2024]. The EU Parliament's resolution supporting Armenia's potential membership, along with initiatives such as the EU's €270 million plan [European External Action Service, 2024], €10 million in non-lethal military aid [Council of the European Union, 2024], and the start of visa liberalisation talks [European Commission, 2024], highlight the EU’s strategic objectives in the region. Our research shows how the EU's nuanced approach addresses regional challenges and promotes stability and development in Armenia.

During our interview with Expert 2, we discussed the significance of the EU-Armenia CEPA for European integration. CEPA provides a framework for cooperation on strengthening democracy, improving legislation, and fostering economic opportunities, aligning with the EU’s goal of deepening relations with its Eastern neighbours. Expert 2 emphasised the importance of implementing reforms but noted Armenia's challenges, particularly in judicial and anti-corruption efforts, shaped by historical and structural constraints. Armenia’s legacy as part of the Russian, Ottoman, and Soviet empires has created state-building obstacles, and education quality remains crucial. Internal and external issues, including military weaknesses and supply chain problems, further complicate reform efforts. The previous government's multivector policy, which favoured Russian dominance in security and infrastructure, also hindered meaningful reform.

It has become clear that Russia is not a reliable security guarantor but an interested party with its business interests. Expert 2 emphasised: *“Meaningful*

cooperation with the EU was initially unrealistic, given Armenia's geopolitical position and relations with Russia”, the expert explained. “However, with progress in democratic reforms and changes in the EU's approach, relations with the EU are now of a different quality”. Gradual or partial integration with the EU could benefit Armenia by expanding cooperation in specific sectors without full membership. Challenges remain, including a lack of professionalism and institutional memory in governmental agencies and the need to improve higher education to prepare specialists capable of implementing reforms: “In a democratic state, effective communication is crucial as it affects legitimacy and shows respect to the people by involving them in decision-making”, Expert 2 added.

The judiciary remains a critical issue, having yet to undergo significant reform. The political environment, dominated by movements rather than structured parties, undermines stability. Developing pro-European parties and fostering a more coherent political culture are essential for long-term progress. Armenia must also improve higher education and ensure governmental institutions effectively utilise EU expertise and funds. The evolving EU-Armenia relationship, supported by the EU's pragmatic external action, offers growth opportunities. However, challenges such as professionalism, institutional memory, and education quality must be addressed for long-term change. CEPA forms the foundation of EU-Armenia relations and guides ongoing integration. As Expert 2 noted: *“The basis for legal approximation, that is, making Armenian legislation compliant with the legislation of the European Union, is based on CEPA. This agreement not only focuses on legal approximation but also requires the proper implementation or ratification of certain international conventions”.*

One of the key documents referenced in CEPA is the European Convention on Human Rights, which guarantees that human rights standards in Armenia are not lower than those in Europe. Expert 2 emphasised: *“The convention is binding for Armenia and lies beyond the relations between the EU and Armenia”.* This indicates Armenia's long-standing commitment to human rights, reinforced by decades of implementation. Another milestone in Armenia's legal integration with the EU is the ratification of the International Criminal Court (ICC) statute. According to Expert 2, *“Armenia ratified the ICC statute and is currently a full member of the ICC. This was a requirement in CEPA, and its fulfilment significantly affected Armenia's domestic legal system and its relations with the EU”.* The ratification of the ICC statute underscores Armenia's dedication to international justice and legal standards. Several domestic regulations govern the legal approximation process, with the CEPA

implementation roadmap serving as “the core document”, as Expert 2 describes it. However, the expert also highlights the benefits of adopting a law by the National Assembly to establish a clear institutional framework, defining the institutions, capacities, methodologies, and responsibilities involved in the approximation process.

The ratification of the Istanbul Convention was another significant step, though it was met with mixed reactions. Expert 2 explained that perceptions of the convention vary due to propaganda and a lack of awareness. Despite this, it aligns with EU principles of equality. However, Armenia faces challenges in aligning its legal framework with European standards, especially in judicial reform, as Expert 2 noted: *“From the perspective of approximation to EU standards, judicial reform is the key problem for the government”*. Geopolitical constraints also complicate energy and transport connectivity. Armenia's dependence on Russia for energy and its lack of direct borders with the EU hinder efforts to develop alternative resources and infrastructure. Expert 2 highlighted this difficulty: *“Ensuring transport connectivity with the European Union is very problematic. It is more about the connectivity within the region, but we have many geopolitical constraints”*, including the ongoing conflict with Azerbaijan, closed borders with Türkiye, and regional political tensions.

In a recent interview, Expert 3 offered a nuanced perspective on Armenia's cautious approach to European integration. The government pursues pragmatic steps that balance traditional alliances with a gradual pivot towards Europe. *“Armenia's policy is a blend of pivoting, hedging, and multi-polarism”*, the expert noted, emphasising that Armenia's geopolitical reality complicates full alignment. While the expert supports the government's careful approach, they stress formalising Armenia's intent to join the EU. Experts warned that vague statements could be reversed, underscoring the need for clarity and commitment. *“The criticism of liberals is that the government is too timid and too slow”*, the expert added, noting that unrealistic opposition expectations risk undermining Euro-Atlantic integration, as Armenia must meet strict EU criteria through long-term efforts.

The Nagorno-Karabakh conflict has influenced Armenia's foreign policy. Expert 3 rejected the notion that the conflict presented opportunities for strengthening sovereignty or advancing integration: *“What happened in Nagorno-Karabakh and the second war is a complete disaster”*. Attributing failures to mismanagement. However, reduced dependency on Russia and increased cooperation with France and India have opened new avenues in foreign and security policies. Internal politics also matter, with the EU cautious due to past regional experiences. Despite

criticism, Expert 3 believes the Armenian government is genuinely committed to integration, and domestic stability and democratic governance are essential for credibility with European counterparts.

Armenia's economic and energy dependence on Russia remains a significant obstacle. Moving away from the Eurasian Economic Union demands gradual economic reorientation. The persistent threat of military aggression from Azerbaijan poses a serious risk to stability and integration. *"The consistent threat of a new military attack by Azerbaijan is the number one challenge"*, Expert Three emphasised. To reduce reliance on any single bloc, Armenia must develop a diversified and resilient economic strategy. Expert 3 concluded by stressing the importance of consistent, realistic steps toward integration. *"The new partnership dialogue starting in the fall is a positive step towards aligning with European norms and values"*, the expert noted, underscoring the need for a balanced, pragmatic approach where each step is carefully planned for long-term success.

4. TÜRKİYE IN FOCUS

Türkiye's path towards European integration and its relations with Europe have been complex and multidimensional, marked by periods of acceleration, stagnation, and slowdown. Despite occasional halts, the integration process, initiated with mutual enthusiasm, has never completely ceased. Historically, Türkiye's journey towards EU integration began in 1959 with a membership request, aiming for full membership status, a goal pursued continuously to the present day [Köse, 2001, p. 1]. One interviewee, based on qualitative research, explains Türkiye's desire for European integration and government policies in the historical context:

"The main feature of the Turkish government's policy on European integration is to be accepted as a European country. For a century, Türkiye's foreign policy has been against Europe due to its imperialist history and in favour of Europe as being considered a powerful country. Having a dual approach towards Europe and European institutions (being against and also in favour) is the core feature of Türkiye-EU relations. To state a micro approach, the main feature of Türkiye's policy on European integration is to instrumentalise the position of EU candidacy and, if possible, EU membership to follow their foreign policy and use this status as a shield".

Key milestones in Türkiye's EU journey include the 1963 Ankara Agreement, the 1970 Additional Protocol, and the 1995 Association Council Decision [Bilici, 2006, p. 44]. The 1999 Helsinki Summit marked a turning point, with Türkiye officially recognised as a candidate, making EU membership a national objective [Mor, 2010,

p. 501]. A respondent highlighted that Türkiye viewed EU integration as a pathway to a stable, democratic environment amidst regional complexities. During this period, the EU imposed various criteria, setting short-, medium-, and long-term priorities for integration. These prompted Türkiye to intensify reforms in 2000 and 2001 and secure financial support aligned with EU conditions [Köse, 2001, p. 173]. In 2002, Türkiye's European integration process gained momentum with the election of the Justice and Development Party (AKP) under Recep Tayyip Erdoğan. The Copenhagen Summit in December 2002 encouraged the new government to continue reforms aimed at meeting accession criteria, with the prospect of starting negotiations in 2004. Europe's encouragement was welcomed with excitement in Türkiye, and the Erdoğan government's 'alliance of civilisations' discourse demonstrated Türkiye's commitment to negotiations during this period [Akın, 2018, p. 3; Balcı, 2017, p. 270].

Following the EU's positive stance in 2004, the AKP government introduced five harmonisation packages in 2003–2004, aiming to fulfil the Copenhagen criteria earnestly [Çalış & Metkin, 2017, p. 20]. These reforms focused on issues criticised by the EU, such as freedom of expression and assembly, ill-treatment, and civil-military relations, with the goal of substantial improvement [Özer, 2015, p. 147]. One interviewee commented on the government's approach to European integration: *“Türkiye’s governments, since the establishment of the Republic, adjust their policy on European integration according to their internal politics. Most of the issues in internal politics have been related to internal politics, and governments use the ultimate aim of being a European state or a member of the EU as a cover for their internal politics”*.

In 2004, Türkiye adopted a package of constitutional amendments focusing on human rights and democracy, including the abolition of the death penalty, freedom of the press, judicial independence, and steps to enhance democracy [Avrupa Komisyonu Raporu, 2004, p. 146–147]. These constitutional reforms reflected Türkiye's commitment to European integration, with significant amendments to approximately one-third of the 1982 Constitution and changes across 218 articles in 53 different laws [Çalış & Metkin, 2017, p. 22]. During this period, Türkiye adopted EU-backed democratic norms, emphasising religious freedoms, civilian control over the military, and other political reforms aligned with its goals [Özer, 2015, p. 148]. Economic integration also remained a key focus, with Türkiye maintaining the Customs Union and striving to meet the Copenhagen criteria [Akçay, 2011, p. 8]. These reforms were positively received in the EU's 2003–2004

progress reports, culminating in the European Council's decision at the December 2004 Brussels Summit to commence accession negotiations on October 3, 2005 [Açıkmeşe, 2010, p. 141; Özer, 2015, p. 147]. On that date, Foreign Minister Abdullah Gül and State Minister Ali Babacan met EU representatives in Luxembourg, marking a significant step in Türkiye's EU accession journey [Hacıtahiroğlu, 2006, p. 124].

The significant step in 2005 did not yield sustainable gains for Türkiye; instead, it resulted in a slowdown of Türkiye's active harmonisation efforts towards European integration, leading to occasional standstills in the relationship dynamics. Post-2005, Türkiye's reform efforts became limited and less effective, focusing on minor constitutional amendments in 2007, a democratic initiative for the Kurdish minority in 2009, and constitutional changes through a 2010 referendum [Özer, 2015, p. 149]. This loss of momentum was influenced by external factors, including the increasing number of political criteria imposed by the EU and its declining credibility toward Türkiye's membership [Noutcheva & Aydın-Düzgit, 2012, p. 68]. Since 2011, relations between the EU and Recep Tayyip Erdoğan's AKP government have been fluctuating and regressive compared to earlier years. While maintaining discourse on EU membership, the government's commitment to earlier reform movements has diminished. Erdoğan's vision for Türkiye in 2023, articulated at an AKP congress, notably omitted any reference to European integration or EU membership [Özer, 2015, p. 155].

Analysing Türkiye's policies and relations with the EU since 2011 reveals significant changes, leading to a decline in interactions. The AKP government's shift involved prioritising politically oriented agendas, including restrictions on freedom of expression and the press—key criteria for EU accession. These policies aimed to stifle criticism from domestic and international sources while consolidating political power [Aydın-Düzgit & Keyman, 2004, p. 2]. For instance, the government paved the way for arrests of journalists and Kurdish activists, often using terrorism laws to silence dissent [Tocci & Bechev, 2012, p. 2–3]. Additionally, significant cases such as the Ergenekon and Sledgehammer trials led to the prosecution and imprisonment of numerous academics, soldiers, and NGO members accused of attempting a coup against the government [Özer, 2015, p. 157]. The Gezi Park events marked a pivotal moment in Türkiye's domestic politics and its relations with the EU. The AKP government, consolidating political power, faced social resistance due to its repressive stance and move toward a presidential system. In response, the government deployed a police force and imposed restrictions on civil

society activities [Gümüştü & Keyman, 2013, p. 2]. Measures included Internet restrictions and legal regulations to curb freedom of expression [Özer, 2015, p. 158]. These developments drew criticism from the European Parliament, while countries like Germany and the Netherlands expressed concerns about Türkiye starting new negotiations [Özer, 2015, p. 160]. The EU's 2015 report highlighted discrepancies in domestic policies, particularly concerning individual freedoms and the rule of law, which diverged from EU standards [Avrupa Komisyonu Raporu, 2015, p. 3]. During the AKP's rule, another challenge to EU integration emerged with the Syrian refugee crisis. Beginning in 2013, mass migration deeply affected Türkiye and Europe, with the EU perceiving it as a significant risk [Akın, 2018, p. 7]. Türkiye implemented an open-door policy for Syrians, initially met with caution by the EU. Over time, the EU provided financial assistance to manage the influx [Yanardağ & Yanardağ, 2019, p. 4]. A respondent highlighted migration as a challenge for integration:

“Migration issue has been one of the key dynamics in Türkiye's EU integration. After signing the Readmission Agreement with the European Union in 2013, the EU launched a visa liberalisation dialogue with Türkiye, including a 'roadmap towards a visa-free regime.' On March 18, 2016, the EU reached an agreement with Türkiye on migrants. Upon this agreement, 'Under this agreement, Türkiye would take back migrants heading to Greece, and in return, the EU would provide six billion euros and grant visa-free travel for Turkish citizens by June 2016 if Türkiye met 72 conditions’”.

In 2016, the July 15th coup attempt posed a significant obstacle for the AKP government and distracted Türkiye from its European integration strategies (Kakışım & Erdoğan, 2018, p. 401). This event prompted sweeping changes in both domestic and foreign policies, initiating a new phase that significantly impacted Türkiye's relations with international actors and the EU [Karabulut, 2016, p. 17]. The EU's wait-and-see approach, coupled with perceived support from some member states for the FETO terrorist organisation, drew strong criticism from the AKP government [Ataman & Shkurti, 2016, p. 61]. Following the failed coup attempt, the AKP government declared a nationwide state of emergency, targeting supporters within state institutions, the judiciary, civil society, and the media. Thousands were prosecuted and suspended, and numerous media outlets and institutions were shut down [Kakışım & Erdoğan, 2018, p. 411]. The EU linked these actions to human rights violations, further straining relations [Akın, 2018, p. 8]. During this period, the AKP government intensified its crackdown on FETO supporters, revisiting the possibility of reinstating the death penalty, which

contradicted EU standards and had been abolished in the early 2000s [Kakışım & Erdoğan, 2018, p. 412]. An interviewee explained the impact of the coup attempt on Türkiye-EU relations:

“Especially, the pressure on civilians and human rights violations following the July 15 coup attempt in 2016 – from the EU perspective – broke Türkiye-EU relations. After what happened during this period, in 2018, the EU Council criticised Türkiye on issues such as the rule of law, freedom of speech, and human rights, noting that the country was moving away from the European Union. Therefore, Türkiye’s accession negotiations were officially stopped in 2019”.

Since 2011, Türkiye’s events and the AKP government's responses have increasingly diverged from the goal of European integration, effectively halting EU negotiations. The 2023 EU Report on Türkiye confirmed that the integration process and negotiations are currently at a standstill, highlighting Türkiye's distancing from EU standards and accession criteria [Avrupa Komisyonu Raporu, 2023, p. 3].

CONCLUSION

This study set out to study the pivotal features of government policy towards European Integration in Georgia, Armenia, and Türkiye, employing a comprehensive methodology that included nine in-depth interviews with experts from social and political sciences, three in each country, alongside a thorough analysis of relevant documents, laws, and research reports. By undertaking a joint examination of these three strategically selected nations, this paper fills a notable gap in existing literature, offering insights that had not been previously addressed. Georgia emerges as a case where the primary challenge lies in the significant gap between policy design and its implementation. This discrepancy is largely influenced by the political will of the government, as well as the prevailing administrative and political culture. The study highlights Georgia's ambivalent positions and subtle Eurosceptic attitudes, which may not be immediately apparent. Furthermore, Georgia has struggled to fulfil the nine critical priorities outlined by the European Commission, which encompass essential areas such as reducing political polarisation, judicial reform, anti-corruption measures, de-oligarchisation, ensuring a free and pluralistic media environment, investigating crimes against journalists, and protecting human rights, including those of vulnerable groups. These shortcomings underscore the complexities Georgia faces in aligning its policies with EU expectations despite its outward commitment to European Integration.

In contrast, Türkiye presents a different set of dynamics. The government's policies towards integration have been primarily shaped by the need to address and rectify internal issues that attract EU criticism, including human rights violations, gender inequality, press freedom, and the use of torture, among others. Türkiye's approach has been multifaceted, focusing on both political reforms—such as civilianising politics, strengthening the judiciary, upholding the rule of law, and enhancing individual freedoms—and economic reforms aimed at establishing a knowledge-based economy and ensuring the independence of the central bank. However, Türkiye faces significant challenges, particularly post-2011, due to events like the Gezi Park Protests, the Syrian migration crisis, and the failed coup attempt. These developments have led to the enactment of harsh policies that conflict with EU criteria, thereby hindering the country's European integration efforts. The resulting tensions between Türkiye's internal policies and EU expectations highlight the precarious balance the country must maintain to advance its integration agenda.

Armenia presents a unique scenario characterised by a delicate balancing act between maintaining close ties with Russia and seeking deeper connections with the European Union. The Comprehensive and Enhanced Partnership Agreement of 2017 and the democratic reforms following the Velvet Revolution of 2018 are central to Armenia's integration efforts, reflecting an increased focus on democratic principles, human rights, and the rule of law. However, Armenia's path is complicated by internal factors such as strong public opinion and active civil society advocating for closer European ties, juxtaposed with external pressures stemming from security concerns, particularly conflicts with Azerbaijan, and economic and energy dependence on Russia. Additionally, Armenia's limited public administration capacity, bureaucratic inefficiencies, and geopolitical vulnerabilities further complicate its integration process. These factors collectively create a challenging environment for Armenia to align fully with EU standards and advance its European integration.

Results reveal both shared and distinct challenges among the three countries. All three nations aspire towards European Integration but encounter unique obstacles shaped by their specific political, economic, and geopolitical contexts. Georgia's primary issue is the implementation gap driven by internal political dynamics, whereas Türkiye grapples with political instability and policy contradictions resulting from significant national events and government actions. Armenia, on the other hand, must navigate the complex interplay of maintaining essential relations with Russia while striving to meet EU integration requirements amidst internal administrative limitations and security concerns.

Despite these differences, a common thread among Georgia, Armenia, and Türkiye is the struggle to align national policies with EU standards, each facing its own set of hurdles in this alignment process. Georgia's challenges are rooted in political and cultural impediments to policy execution, Türkiye's in political volatility and policy backlash, and Armenia's in balancing external dependencies and enhancing internal administrative capacities.

The implications of this study are multifaceted. Firstly, it provides an in-depth understanding of the specific characteristics and challenges each country faces in their European integration journey. Secondly, the findings offer valuable insights for policymakers and relevant agencies in Georgia, Armenia, and Türkiye to refine and enhance their integration strategies. By identifying the critical barriers and enabling factors, decision-makers can formulate more effective policies that bridge the gap between design and implementation, address political and administrative inefficiencies, and better navigate geopolitical complexities.

Moreover, this paper serves as a significant academic resource for researchers and scholars interested in European Integration and the distinct pathways of Georgia, Armenia, and Türkiye.

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THE CONFLICT BETWEEN STATE AND SOCIETY DURING THE WAR IN UKRAINE: THE ISSUE OF AGENCY

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Abstract

The authors of this article aim to clarify the specifics of the State-Society conflict, which reached its peak during the events of 2013–2014, to determine the essence of

the Ukrainian events of the last decade along the axis of the State-Society conflict in the context of further modernization of Ukraine.

To do this, it is proposed to analyse the dynamics of changes in geopolitical, socio-economic and political contexts; to investigate the peculiarities of the development of the confrontation in the border territories, which were of key importance in the process of transformation of the confrontation from the beginning to an armed conflict; through the prism of sociological research, to reveal the dynamics of relations between the State and Society during the last ten years and to find out their real state.

Key words: State and society, Russian-Ukrainian war, border region, Ukraine in 2014–2024, armed conflict, agency, education in war conditions.

INTRODUCTION

The relationship between the State and Society has a key influence on the modernization of the political system. The format of these relations determines the success of statehood, its ability to develop and stability under the pressure of internal and external factors. This problem acquires additional relevance in the conditions of the transformation of the world order, which is characterized by variability, destabilization of usual institutions, and redistribution of resources.

During the previous decade, in many states, in particular, those in the process of democratic transition, conditions arose in which societies, dissatisfied with the quality of public administration, tried to take responsibility for the fate of their countries. Ukraine was among them. As of the end of 2013, irreconcilable contradictions formed between the state power and society in the economic and political spheres: the growing influence of oligarchic groups, the lack of transparent circulation of elites, corruption, attempts by the ruling group to control both the legal and shadow sectors of the economy in their own, not state, interests.

The conflict was aggravated by the geopolitical situation. After all, Ukraine, although it is the largest country in Europe and has significant natural and human resources, for a long time could not realize its potential, being at the crossroads of the interests and conflicts of the USA, the EU, and Russia. The very decision of the State in the field of foreign policy (refusal to sign the Association Agreement with the European Union) became the attractor that provoked mass protests in Kyiv and later throughout the country. It should be noted that despite the global trend of democratization, a large part of the states that were formed after the collapse of the Soviet Union, under the influence of the Russian Federation, began to turn to authoritarianism. And the Ukrainian Society's resistance to autocracy and Russian aggression can be called part of the global struggle for democracy [Nagornyyak et al. 2023: 69–70].

The influence of these factors on the border regions (especially in Donbas and Crimea) was manifested even more vividly due to the peculiarity of the regions, which are characterized by the lack of a formed civil and national identity, where statism, the demand for a “strong hand” are even more concentrated than in the country as a whole, where the control of the state weakens, and the influence of neighboring countries and local specific actors creates an environment favorable for conflicts with the state center.

The result of the accumulated contradictions was not only the conflict between Society and the State, which was manifested by the Euromaidan and various protests throughout the country. They determined the further development of Ukraine and became one of the prerequisites for the aggravation of the situation in the country and the beginning of an international armed conflict.

As of 2024, the main challenge for Ukrainian statehood is a full-scale war with Russia. However, sociological services are increasingly recording the growing attention of citizens to problems, including those that led to the culmination of the confrontation between the State and Society in 2013–2014.

Previous studies of the problems of the relationship between the State and Society testified that, based on the results of the confrontation in 2013–2014, for the successful modernization of Ukraine, there had to be a “policy correction towards the transparency of the actions and decisions of the State and local self-government bodies, the strengthening of social capital in society and the reproduction of the political identity of the state-nation” [Nagornyak 2015: 87].

1. GEOPOLITICAL FACTORS OF THE CONFLICT BETWEEN THE STATE AND SOCIETY IN UKRAINE

As of the end of 2013, Ukraine was at the center of a geopolitical conflict between the US and the EU on the one hand, and Russian sub-imperialism on the other. Ukraine was at the same time one of the objects of the conflict and tools for weakening the opponents. Each of the parties tried to strengthen its control over the state's resources and keep it within its “sphere of influence”. The European Union proposed an Association Agreement, but, as further practice showed, it did not plan to include Ukraine as a full member soon. The Russian leadership offered participation in the Customs Union and a loan of 15 billion dollars in exchange for maintaining a loyal political regime.

With the beginning of the armed conflict in 2014, the USA and the EU tried to weaken Russia with sanctions, but at the same time to preserve economic ties

beneficial to themselves (supply of cheap energy carriers, nuclear fuel, cooperation in the space industry). Russia, on the other hand, used the border to destabilize Ukrainian statehood and increased the intensity of special operations in European countries. Analysts of the International Center for Prospective Studies correctly described the approach of European countries to the conflict: “Most EU countries and officials of European institutions are trying to balance between the need to put pressure on the Russian Federation, but at the same time not to cross the “red line”, after which the deterioration of relations can become irreversible and lead to direct security challenges or threats to the EU and NATO countries themselves” [Ivashko et al. 2015: 3].

By 2022, the geopolitical conflict only intensified, the circle of participants expanded, and some demands and intentions of the parties became public. In December 2021, the Ministry of Foreign Affairs of the Russian Federation published a draft agreement on the so-called “security guarantees” that Vladimir Putin demanded from NATO [Radio Liberty 2021]. It was de facto about redistributing spheres of influence in Eastern and Central Europe. In two months, China supported the Russian demands. As of 2024, Russian aggression against Ukraine was supported and provided military assistance for its implementation by several authoritarian states: North Korea, Iran, and Belarus. Instead, NATO accepted two new members – Sweden and Finland.

During this period, Ukraine remained a subject of global conflict. It did not receive significant support from the EU and the USA, and it developed its defense policy under the conditions of a de facto embargo on the supply of Western weapons.

It should be noted that the Russian leadership effectively used its influence on the Ukrainian border and the system of myths and misinformation formed around it: “protection of Russian speakers”, “people of Donbas”, etc. Even after the start of the full-scale invasion of Russia, former US President B. Obama refused to recognize the weak reaction of the United States to the occupation of Crimea as a mistake, referring to the allegedly large number of pro-Russian population on the peninsula [CNN 2023]. European leaders justified their refusal to provide or sell weapons with participation in the “peace process” and attempts to “return Donbas diplomatically”, although later A. Merkel, as a direct participant in the Normandy Format, admitted that agreements and negotiations were needed only to delay time [Zeit Online 2022]. Against the background of these talks and the lack of a real desire for settlement, Russia realized the potential of the border areas as “conflict zones”. It established and for years strengthened actual control over Crimea and part of Donbas and used

these regions to put constant pressure on Ukraine and create risks and threats in the economic, political, and military spheres.

The global trend of the first half of the 2010s, of which the Revolution of Dignity was a part, was the self-organization of societies against the background of the inability of governments to protect national interests, and social and economic needs of the population given the increasing pressure from superpowers. In 2011–2016, protest actions spread from Rio de Janeiro to Moscow. All these movements were united by dissatisfaction with the institutions that limited the possibilities for implementing the Society's requests through legal means. The key demand was to overcome corruption and make political systems more open.

It is worth noting that most of these protests were unsuccessful and did not achieve their goals in the perspective of several years. Namely: N. Maduro remained in the position of president of Venezuela, V. Putin destroyed the remnants of the opposition for several years and continued to lead the aggressor country, L. da Silva, despite being accused of corruption, became the president of Brazil for the second time in a few years. The essential contradictions between the State and Society could not be overcome in all the conflicts mentioned above, and the conflict went into a latent phase. To a large extent, the Revolution of Dignity also remained another untapped chance for Ukraine, because the public protest never reached the stage of institutionalization, changing the elite only formally, without a substantial change in the model of public administration.

2. THE SOCIO-ECONOMIC DIMENSION OF THE CONFLICT

The significant deterioration of the economic situation in 2010–2013 forced President V. Yanukovich to look for additional sources to fill the state budget. After an unsuccessful attempt to obtain foreign loans from the IMF, the government's efforts were directed at introducing strict control over the transfer pricing mechanism, which was used by all industrial and financial groups to optimize taxes and withdraw foreign exchange earnings to low-tax jurisdictions [Krut, Filipchuk 2015: 2].

In the efforts of V. Yanukovich and his entourage to gain a monopoly on the redistribution of resources, the authorities encroached on control over the shadow sector. It has traditionally been a space for the accumulation and preservation of capital not only for big business, but also for the population, and made up a significant (about a third) share of the economy [Ministry of Economy of Ukraine 2021: 2].

Partially negative phenomena in the economy and finances managed to be masked by spending reserves. About 7 billion dollars in a year were spent to maintain the dollar exchange rate [National Bank of Ukraine 2024].

Thus, on the eve of nationwide protests, the situation in the economy was in crisis, but stability was simulated. Therefore, economic slogans were not among the most important on the Maidan. However, immediately after the change of power, these problems were at the center of attention and became the basis for involving a wide range of citizens in the protests in Donbas. Pro-Russian separatists actively used anti-oligarchic rhetoric, which the residents of the region perceived as fair and urgent. However, the European integration slogans of the ideological leaders of the Maidan in Kyiv quickly turned into calls for a change of government, just as the protests in Donbas changed from economic demands to anti-government speeches (but already against the new government). In a few months, direct representatives of the Kremlin (O. Borodai, I. Strelkov) seized control over part of the region and started a military operation under completely different slogans.

In the fall of 2014, a wave of protests took place in the occupied cities, caused by the massive impoverishment of the population and the lack of food. But this activity was quickly suppressed by the occupation authorities.

The long-term risks that formed during this period in the border areas later led to more significant consequences. Direct military intervention and subsequent occupation of the border by Russia led to the economic isolation of these areas. The economic ties of the occupied part of Donbas and Crimea with Ukraine were almost completely cut off in 2017, and with the start of the COVID-19 pandemic, transport connections were also interrupted. As a result of this and the purposeful policy of the occupiers in Donbas, the level and living conditions constantly deteriorated, and the local population became poorer. The Russians created the conditions for marginalization and impoverishment, which greatly contributed to the increase in the number of local armed formations (the so-called 1st and 2nd “army corps”), and after the start of a full-scale invasion – mobilization to the occupying army.

Meanwhile, due to hostilities, the loss of about 7 % of the territory, and accumulated economic problems, the government in Kyiv was forced to concentrate on solving the problems of the controlled territories. Without sufficient support from external actors, Ukraine did not have the military resources to return the territories, and the financial capabilities to settle with creditors.

Partly due to these objective reasons, and partly due to the inability of the new government in Kyiv to carry out reforms, real de-oligarchization and ensure economic growth, the conflict between Society and the State, although it entered a

latent phase, was not resolved. The ratings of all parliamentary parties (both coalition members and opposition parties) fell rapidly, and in 2019, this process ended with the electoral defeat of most of the “old” parties and President P. Poroshenko at the time. During the entire tenure of the Verkhovna Rada of the 8th convocation, sociological studies showed that the Society considered corruption to be one of the biggest problems. As of December 2018, according to sociological polls, 82 % of Ukrainians had a low opinion of the socioeconomic situation in the country, 78.6 % of respondents attributed the responsibility for this state of affairs to “incompetent and/or corrupt public figures who were in power” [KMIS 2018].

However, the change of president in 2019 did not bring the expected result. Sociological studies show that even despite the war, society's demand for reforms in the economy and, first of all, for the fight against corruption remains huge. Sometimes society puts corruption risks at the same level as the risks associated with war, even under the conditions in which the country has been since the beginning of a full-scale war [Savchuk, Shurenkova 2023].

3. EDUCATIONAL REFORMS DURING THE WAR AS A CONFLICT-CAUSING FACTOR IN THE DIALOGUE BETWEEN THE STATE AND SOCIETY IN UKRAINE

The occupation of a part of the territory of Ukraine in 2013-2014 demonstrated the immaturity and inability of the State in terms of coordinating actions regarding the evacuation of educational institutions, their teams, and students. In 2022, this failure repeated and the Society self-organized to provide educational services in any way and restore the functioning of institutions in the relocated territories by the forces of teachers, students, and their parents. Thus, according to statistical data, at the beginning of 2023, 13,875 preschool education institutions, 12,976 general secondary education institutions, 670 vocational (professional and technical) education institutions, 332 higher education institutions, 740 institutions of vocational pre-higher education were operating in Ukraine. In total, about 6.5 million students studied in these institutions and almost 0.7 million pedagogical and science-pedagogical workers worked. As a result of the armed aggression of the Russian Federation against Ukraine, as of the end of July 2023, 337 educational institutions were destroyed and 3,199 were damaged. [Ministry of Education and Science of Ukraine 2023: 7]. More than 30 institutions of higher education were relocated and resumed their activities at new legal addresses. Since the full-scale invasion of Russia, Ukraine has lost more than 20,000 foreign students, increased the number of male students in master's and postgraduate education programs,

reoriented the vector of its scientific research and grant applications in the direction of studying stress resistance and resilience, reskilling and upskilling programs for adult education (including veterans and internally displaced persons), innovative teaching and learning methods, interdisciplinary educational programs aimed at the formation of specialists for the reconstruction of Ukraine.

Higher education in Ukraine today is a space with a large number of random people who study and teach without motivation for self-development, which does not contribute to strengthening the culture of quality or forming a national elite of the highest quality. Correlation between the number of applicants and the salary of a teacher (in most higher education institutions), the existence of universities with outdated infrastructure (including research), the conditionality of specialized universities, the unpreparedness of the entrant to learn the content of educational programs of higher education institutions due to the “loss of knowledge” in the conditions of the covid pandemic – 2019 and online training during wartime. The consequences of such things are dangerous for the recovery of the country's economy already. In Ukraine, more than 150,000 people have the status of unemployed (excluding those citizens of Ukraine who left the country due to the war), among whom half have higher education. The analysis of the regional dimension of the process of filling vacant positions demonstrates that graduates of higher education institutions do not possess sufficient knowledge and competencies that employers need, therefore the competition for one vacant position of a manager (in various fields of activity) can range from 11 to 23 people per position and remain open for several years. The labor market of Ukraine is already filled with unemployed graduates and continues (to a greater extent) to train specialists without taking into account the needs of the country's reconstruction in wartime conditions. The correction of the situation is possible due to a careful study of the labor market, personnel collaboration of universities in order to concentrate a critical mass of researchers and teachers who can solve the tasks of the national economy, flexibility in employment issues, a dynamic trajectory of the teacher's professional activity and a broad individual training trajectory of the student. Inevitable trends in this context are those that have already started in 2023 with the new structure of the Ministry of Education and Science of Ukraine, and which also turned out to be a conflict-causing factor in the dialogue between the State and Society. Including:

- 1) Optimizing the network of state and municipal institutions of higher education with the help of short-term (1–2 years) support programs for their unification. Such programs will aim at legal and technical assistance, transitional

management, and additional financing at the start of a new economic entity from the State and recognition of the need and promotion of reforms from the Society.

2) Reduction in the number of state and municipal higher education institutions due to the reduction of educational programs that have the lowest percentage of employment and less need during the post-war recovery of the state in favor of specialists in post-war recovery and strengthening of the military industry of Ukraine.

3) Corporatization and possible further point privatization of universities (creating opportunities to attract private investment to the field of higher education).

5) Development of adult education (targeted training and reskilling programs, active use of educational vouchers, short-term programs for IDPs and other vulnerable population categories, interdisciplinary educational programs).

6) Restarting work with foreign students and postgraduates (ensuring the attractiveness and competitiveness of Ukrainian higher education institutions in the world market of educational services).

7) Development of English-language educational programs, English-language research platforms and system of activities joint with foreign scientists (integration of higher education of Ukraine into the European Educational and Scientific Research Center and global open science).

For the successful implementation of the mentioned reforms, which are very necessary for Ukraine, Society needs a consistent and open dialogue with the State, first of all regarding the strategic priorities of the development of the state / education / higher education / universities / teachers; target indicators of the expected development model in each direction; clear and transparent performance evaluation indicators, etc.

4. THE POLITICAL DIMENSION OF THE CONFLICT

As of 2013, an authoritarian system was formed in Ukraine with a single center of power – V. Yanukovych and his entourage, which had a territorial attachment to the Donetsk region. Manual management through party and clan proteges and “watchers” permeated the entire vertical of state administration. The parliamentary opposition did not demonstrate readiness to actively oppose.

However, the arbitrariness of law enforcement agencies, from the police to the tax office, intensified the conflict with the Society. The first significant blow to the system of power was the long protest actions in the village of Vradiivka, which later

turned into a march on Kyiv. Citizens demanded the punishment of policemen-rapists, and later the resignation of the Minister of Internal Affairs O. Zakharchenko. The authorities responded by violently dispersing the tent city when protesters began to rally in the capital. Protest actions due to the crime in Vradiivka took place in at least 15 cities of the country.

The key event of 2013–2014 was the Euromaidan, which began as a student demonstration against the decision of M. Azarov's government to refuse to sign the Association Agreement with the EU. However, the forceful reaction of the authorities and the introduction of repressive laws radicalized the protest and it turned into an anti-government one. The several-month-long confrontation ended with the shooting of protesters and V. Yanukovych's flight from the country. Immediately after that, Russia began annexing Crimea and later unleashed aggression in Donbas. In Kyiv, the authorities were reformatted: O. Turchynov began to perform the duties of the president temporarily, a return to the 2004 version of the Constitution took place, early presidential elections were called, and the balance of power in the parliament changed. The situation on the streets worsened – demonstrations continued in the eastern and southern regions, during which clashes took place between supporters of the integrity of Ukraine and sympathizers of Russia. Several dozen people died as a result of the confrontation in Odesa on May 2, 2014.

As of mid-2014, there were three fronts in Ukraine:

1) Institutional. An external vector of development can be considered a formalized subject.

2) Armed (official, voluntary and illegal military groups). The subject of the military conflict that unfolded in the Luhansk and Donetsk regions of Ukraine was the administrative-territorial status of Donbas.

3) The socio-political (participants of mass protests and public interest groups) front acquired the names “Maidan” and “Anti-Maidan”. [Nagornyak 2015: 84].

Against this background, P. Poroshenko won the presidential elections in the first round. However, it is worth noting that voting did not take place in Crimea, and in two regions of Donbas, polling stations were not opened in 25 districts. During the next 9 months, two events took place that determined the state's policy for several years to come. At the early elections, the reformation of the parliament took place, which strengthened the power of P. Poroshenko. The conflict in Donbas was “frozen” for seven years.

The transfer of power in the conditions of the revolution and the flight of President V. Yanukovych continued for three months, during this transitional period the state

system was in a state of chaos. That made it vulnerable to external influences and unable to respond quickly and adequately to security and political decisions.

In this period, the features of the border area with Russia became critically important. The unformed civic (national) identity of residents, the low level of political participation, and the state center's ignoring of the region's problems created prerequisites for citizens' vulnerability to the influence of external players. This tendency was strengthened by the influence of Russian propaganda – the residents of the border regions trusted the Russian media [Ilko Kucheriv Democratic Initiatives Foundation 2013], which always dominated the local information environment. Moscow infiltrated its agents of influence and intensified actions of defiance throughout southern and eastern Ukraine and effectively seized control of protest activity in several regions. At anti-government rallies in Donetsk and Luhansk, one could hear the pronunciation characteristic of Russian regions. Russian citizens were among the participants in attempts to seize administrative buildings in Kharkiv – later they became commanders of militant units. In Crimea, the situation immediately turned to the intervention by military formations.

In all these regions, part of the local population tried to resist the occupation (the rallies in Donetsk in March 2014, the rally near the Crimean Parliament in Simferopol on February 26, 2014, etc.). But this resistance had no chance. First of all, it was relatively small in number – even a ten-thousand-strong rally for a united Ukraine was an abnormal phenomenon, most residents were not ready to go out into the streets. Most of the patriotic events took place at night (cities dressed up in yellow and blue ribbons, leaflets appeared at the entrances of multi-store buildings, social networks united patriotic citizens, etc.). The arrests continued and it was clear that the State had removed itself from solving these issues. The mass media did not spread information about the struggle of Ukrainian activists and the pro-Ukrainian population in the border areas, which over time strengthened the false stereotype about the “pro-Russian region that brought the war to the country”.

There were several prerequisites for this, related to the peculiarities of the Ukrainian border territories and the State's inability or unwillingness to control them.

For decades, the central government had a very limited influence on Donbas and Crimea, and for at least ten years it showed no desire to change the situation. These territories were managed by financial and industrial groups. After the 2010 presidential and local elections, the Donetsk financial and industrial group only consolidated its positions: in addition to informal control of Donbas, it finally

monopolized state power and undivided control over local self-government: the Party of Regions had 80 out of 100 mandates in the Verkhovna Rada of Autonomous Republic of Crimea, and 166 of 180 in the Donetsk Regional Council [Kohut, Sidash 2011: 49, 74], this party received comparable shares of deputies in the Luhansk Regional Council and regional centers of these three regions.

If after the escape of V. Yanukovich and a significant number of representatives of the Party of Regions, the opposition was able to seize power in the center, then in the border regions in the east and south, the state was completely paralyzed. The police and security forces initially did not intervene in the clashes, and then a significant part of their personnel began switching to the side of the occupiers. Local councils, which were used to orienting themselves to an authoritarian leader and following instructions from Kyiv, turned out to be ineffective. For example, in Donetsk, pro-Russian (and Russian) forces easily captured the premises of local councils, gained access to the stand, and later literally dispersed local deputies.

In the absence of Kyiv's levers of influence and the paralysis of local self-government, the further development of events was largely determined by local elites, who usually have a special influence in the border areas. Ukraine clearly demonstrated how the position of the elite at the borderlands could change the fate of the entire region at the beginning of 2014.

In Kharkiv, on April 8, 2014, the special unit "Jaguar" liberated the regional administration building and effectively put an end to Russia's attempts to destabilize the region. The decision to carry out the operation was made by A. Avakov, the Minister of Internal Affairs at the time and one of the most influential politicians of the Kharkiv region.

A different scenario played out in Donetsk. For several weeks, local elites tried to use protest activity to "bargain" with the new government and promote the idea of autonomy. They prevented the storming of the regional administration. When the influential businessman R. Akhmetov went to the Regional State Administration to personally negotiate on the unblocking of the building, it turned out that the protesters did not respect his authority. Time and influence were lost. Russia took control of the situation in the region, and further appeals by R. Akhmetov to stop the protests and abandon separatist activities had no effect.

The third scenario was implemented in Crimea. First, the Russian military took over the authorities by force. And secondly, part of the local elites, who suffered from the pressure of the Donetsk clan and did not want to negotiate with the new authorities in Kyiv, betrayed Ukraine. O. Chalyi and S. Aksyonov were given leading positions in the occupation administrations in return.

Thus, as a result of the culmination of the confrontation between Society and the State at the national level, as of 2014, there was a change in power, and at the border, where “a large number of actors are actively operating, who form a spectrum of security threats and vulnerabilities that the central government has to deal with” [Vrey 2012: 195]. Under the influence of external players and local elites, this confrontation took the form of an armed conflict and allowed Russia to occupy significant territories.

The change of faces in the government offices did not lead to overcoming the conflict between Society and the State. On the contrary, the winners moved away from the path of democratization and changing the economic model: the new government was formed by people who were connected to large financial and industrial groups, and the new president began the process of power concentration by dissolving the parliament. The elections that took place in the fall of 2014 only cemented the situation for years to come. Parties with a significant share of representatives of financial and industrial groups in the electoral list entered the parliament. P. Poroshenko's attempts to concentrate power continued: he succeeded in appointing representatives of his party as prime minister and prosecutor general. This period is characterized mostly by the imitation of reforms to obtain funding from international actors and situational alliances and conflicts between representatives of different financial and industrial groups over resources and power. Society was not among the key actors. Its conflict with the State, which took an open form in 2013–2014, entered a latent phase.

Unprepared for large-scale protests against the background of hostilities, the Society expressed its protest in the 2019 elections – V. Zelenskyi was elected president by a huge margin, and his party won a mono majority in the parliament, while most of the parties that were represented in the previous convocation of the Verkhovna Rada, could not overcome the passage barrier.

However, the huge creditworthiness and the entry of new faces into the government offices did not lead to the realization of society's demand for de-oligarchization, social justice, and a change in the economic and political model. In his first years in office, V. Zelenskyi followed his predecessor's example: dissolving the parliament on dubious grounds, appointing “100 % his prosecutor general”, and transferring the decision-making center to the President's Office. Situational alliances with oligarchic groups were used to maintain control over the parliament. At the same time, opposition groups were subjected to media attacks and pressure from law enforcement and regulatory agencies.

Management trends that did not match the expectations of the population, disappointment in “new faces”, government inefficiency in the economy (the Ukrainian economy began to shrink even before the pandemic and was slowly recovering after it) led to the continuation of the conflict between the State and Society. It manifested itself in street activity (rallies “No to surrender”, “SaveFOP”, rallies in support of the activist S. Sternenko) and a steady decrease in the ratings of the ruling party [Sociological group “Rating” 2021].

Rallying around the flag" with the start of a full-scale war temporarily changed the situation in the polls and made it possible to talk about record support for V. Zelensky in 2022–2023. However, since the fall of 2023, there has been a decrease in trust, both in the president and in his party.

Characteristic of the entire decade (2014–2024) is that the State quickly disappoints Society with each change of power, and state institutions, which are primarily associated with power in the mass consciousness (president, government, parliament), steadily lose electoral support after the elections. While social institutions as volunteer organizations, volunteers, the Armed Forces (which now largely represent a cross-section of society due to mobilization and quantitative composition) – remain perennial leaders in terms of trust.

For more than a decade, none of the above-mentioned “fronts” has disappeared. The objects of confrontation have partially changed, and some actors have gained more importance within the opposing groups, but the “fronts” themselves remain relevant even 10 years later. European integration has become a common slogan for most political forces. However, pro-Russian politicians who cannot publicly maintain ties with the aggressor country are still represented in local councils and even in the parliament. Russia is trying to change the foreign policy vector not through its agents of influence, but by force. That does not exclude constant attempts to impose more convenient leaders on Ukraine.

Now the occupied borderlands of Ukraine can hardly be considered the subject of an “armed” front – Russia is trying to subjugate our country as a whole and has moved to direct full-scale aggression. Illegal formations with residents of the occupied Donbas, who also have Ukrainian passports – “1st and 2nd army corps” have become part of the occupying army, residents of Crimea participate in hostilities on the side of the aggressor as contract soldiers and drafted. The border areas, which were zones of instability, turned into conflict zones in 2014, and in 2022 they became the main bridgeheads for the expansion of Russian aggression and attempts to destroy Ukrainian statehood.

The socio-political front moved away from the “Maidan/Anti-Maidan” confrontation format. However, this is primarily due to the obsolescence of these categories and the fact that the full-scale armed conflict between Ukraine and Russia overshadows all others. It should be understood that the socio-economic basis of the protests has not changed significantly in 10 years. While the value confrontation was hidden due to the occupation of part of the territories. After the liberation of the occupied lands (the authors consider only this variant of the development of the Russian-Ukrainian armed conflict), these problems may come to the surface again. And taking into account the losses on both sides in hostilities, the ten-year influence of Russian propaganda in Donbas and Crimea, finding ways to overcome the conflict and reintegrate residents of the territories occupied for ten years may turn out to be an extremely difficult task for both the State and the Ukrainian Society.

CONCLUSIONS

The Ukrainian protests of 2013–2014 can be called part of a global trend in which societies in different parts of the world demonstrated the ability to a high degree of self-organization and spoke out against the governments of their states, which are unable to overcome corruption, transparently distribute resources and protect national interests. However, the further development of events showed that even the highest level of self-organization does not guarantee the realization of citizens' aspirations. Governments in many countries (especially autocracies) have proven to be more stable, have retained power, and increased pressure on their societies by reversing democratization.

In Ukraine, a change of government took place and did not bring the expected results. One by one, the leaders of the state repeated the path of their predecessors, trying to concentrate power in their hands as much as possible, without seeking a dialogue with the Society. Oligarchic groups continue to maintain their influence on the political system, and Society remains outside the list of determining subjects. The communities of the border areas, which today suffer more than others from the war with Russia, remain just as ineffective.

Considering the state of dialogue between the State and Society in the period 2014–2024, it is worth noting that the subjects of the conflict were the ineffective State and the self-organized Society. And even today (during the war and as a result of all the changes of political elites), the Society still has the same demands regarding de-oligarchization, the fight against corruption, and the protection of Ukraine's national interests. In Donbas and Crimea, the socio-economic background of the

protests did not differ from the national one. However, value conflicts developed within the regions, which were actively fueled both by the state center and by local elites and Russia. The slogans quickly became politicized, and in the conditions of the collapse of state institutions, the incapacity of self-government, and the destructive activities of local elites, the confrontation went beyond peaceful confrontation and beyond the borders of the regions themselves, turning into an international armed conflict with the active participation of Russia. Ukraine, against the background of the unfavorable geopolitical situation and its buffer status, did not have the resources and adequate support to repel the aggressor. This allowed Russia to develop its occupation management system over part of the territory of Donbas and Crimea over the next few years, turning these Ukrainian borderlands into its own bridgeheads for the expansion of aggression by 2022.

In Ukraine, during 2014–2024, the renewal and rejuvenation of the political elite took place. However, it did not lead either to overcoming the conflict between the State and Society, or to the development and implementation of a modernization model for the development of European Ukraine. The spread of an activist political culture in the second half of the 2010s resulted in a series of protests in Kyiv, but since the beginning of the full-scale Russian invasion, the majority of active representatives of the Society have concentrated on the defense of the state, both with weapons in their hands and through volunteer activity. To date, they have limited influence on changes within the country due to martial law, hostilities, corresponding restrictions on rights and the postponement of elections. However, it can be reasonably assumed that after the end or a significant reduction in the intensity of hostilities, Society will demand the modernization of the political system. The state of the State will also contribute to this. It will be no less a test than the war itself and victory in it.

As of April 2024, there is a parliamentary crisis in Ukraine, a crisis of confidence in government institutions (except for the defense sector), half of state budget expenditures are financed by external loans and grants, and the oligarchic model has exhausted itself. Under such conditions, additionally burdened by the consequences of hostilities, the need to reintegrate difficult border areas, and the pressure of external players, the State will be forced to compromise and dialogue with Society. Attempts to reproduce another cycle of autocracy with an orientation towards oligarchs may lead to new protests and the collapse of the State.

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CONSTITUTION-MAKING PROCESS IN CHILE: THE CHILEAN PARADOX

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Abstract

This article examines the political aspects of Chile's constitution-making process, which began in 2019 and ended in 2023. It names, analyses and interprets the causes, course and outcomes of the process. It also highlights the pendulum effect that occurred during the process and led to the “Chilean paradox” – the much-criticized constitution that the process was meant to replace eventually emerged victorious and, virtually unchanged, became more acceptable.

Key words: Chile, constitution, constitution-making process, Chilean paradox.

INTRODUCTION

For several decades, Chile has been a source of valuable stimulus for investigation within political science. This was the case when the country was the first to elect a Marxist president, Salvador Allende, in free and democratic elections in 1970, thus starting the “Chilean road to socialism”. This was also the case when the military dictatorship of Augusto Pinochet was inspired by neoliberal economic principles. And in recent years, it has been mainly because of the constitution-making process, which both started and ended in a specific way.

Although reflections on a new constitution have been in the public discourse for a long time, the real accelerator of the process was the massive social unrest in 2019,

unprecedented in Chile. At that time, the eyes of the world were on Chile as an example of a country that would try to solve social problems by giving its citizens the opportunity to redefine the foundations of the common order. It was a democratic response to social tensions that could become a model for other countries struggling with similar problems.

The constitution-making process was also supposed to put an end to the authoritative legacy of the past, which Chile is still struggling with, even though the younger half of the population has not experienced the dictatorship. In the context of the points mentioned above, it is difficult to understand at first glance what actually happened: the citizens in the referendum unequivocally voted for the creation of a new constitution, twice elected their representatives to the constitutional body and, finally, twice rejected specific proposals for the new constitution.

The aim of this article is to analyze the political aspects of the constitution-making process in Chile and to interpret its results.

1. THE 1980 CONSTITUTION

Augusto Pinochet's dictatorship in Chile ended in 1990, but one of its controversial legacies has endured to this day – the constitution. It was adopted in 1980 in a nationwide referendum, legitimizing the authoritarian regime and strengthening Pinochet's position as president of the republic. Although there are suspicions of manipulation of both the course and the results [Fuentes, 2020], this constitution is still valid today.

The key concepts underlying the constitution are anti-communism, technocracy and laissez-faire economics. [Couso, 2012, p. 411] Parties and organizations that rejected the family or were based on the idea of class struggle were outlawed. The separation of powers was redefined in favour of the executive branch and "technocratic" institutions with non-elected members such as the Armed Forces, the Constitutional Tribunal, the National Security Council or the Central Bank. These institutions could also appoint non-elected senators to the Senate and thus influence the legislative process.

From an economic point of view, although this was not explicitly mentioned in the text, a leaning towards the neoliberal model can be detected. [Aste Leiva, 2020, p. 11] The Constitution defined Chile as a subsidiary state. *“Subsidiarity is that the state should refrain from acting where private persons are adequately meeting their own needs, and should act only where they are unable or unwilling to do so”.*

[Faúndez-Sánchez, 2016, p. 214] Thus, the Constitution itself limited state intervention to areas that the private sector was unable to address effectively. It guaranteed the right to private property and significantly limited the creation of state-owned enterprises. The armed forces became the guarantor of institutional stability and compliance with the Constitution.

Since 1989, there have been several reforms that have democratized the constitution. The ban on Marxist parties was lifted, as well as the possibility to directly seat senators. The president lost some powers but gained the ability to dismiss the commanders of the armed forces. The process of constitutional reforms was simplified and some quorums were reduced. Despite these changes, the constitution still bears the stamp of dictatorship in many areas.

2. THE SOCIAL OUTBURST 2019

At the end of October 2019, then-President Sebastián Piñera had to declare a state of emergency due to civil unrest. The trigger was an increase in the price of metro tickets in Santiago de Chile, but a few days later there were already spontaneous protests in the streets across the country against expensive education, healthcare, income inequality or low pensions. The protests did not have prominent leaders or clearly articulated demands. In the words of the current President, Gabriel Boric, *“this was no mere wave of riots. It was an expression of the pains and fissures in society that politics failed to interpret and provide answers to”* [Europa press, 2022] According to Parra Coray [2021, pp. 193–194], this is the result of a series of unresolved problems since the return to democracy, including a development model based on exclusion, an elitist political system, and a long-term inability to integrate the socio-political demands of the population. These problems were covered over by the economic growth and political stability that characterized the country especially in the first decades of this century. Political actors were unable to understand the incompatibility between the changes in society and the continuation of neoliberal policies designed during the dictatorship. Market inequalities have led to the segregation of some segments of the population and also to the precarization of the middle class. Gradually, social movements and actors began to demand “change from below” and identified the 1980 Constitution as one of the main enemies.

A survey was conducted among the participants of the protests in November 2019, asking them to identify the three main demands that made them join the protests. The most inflected demands were “Pensions” (75 %), “Health” (57.7 %) and “Education” (56.9 %). In fifth place was the demand for a “New Constitution” (21.4 %),

which was supported by about one-fifth of the respondents. In total, up to 19 specific areas in which the protesters demanded improvement could be identified. Further demands were classified as “Other” (6.6 %) [NUDESOC, 2020, p. 10].

Table 1

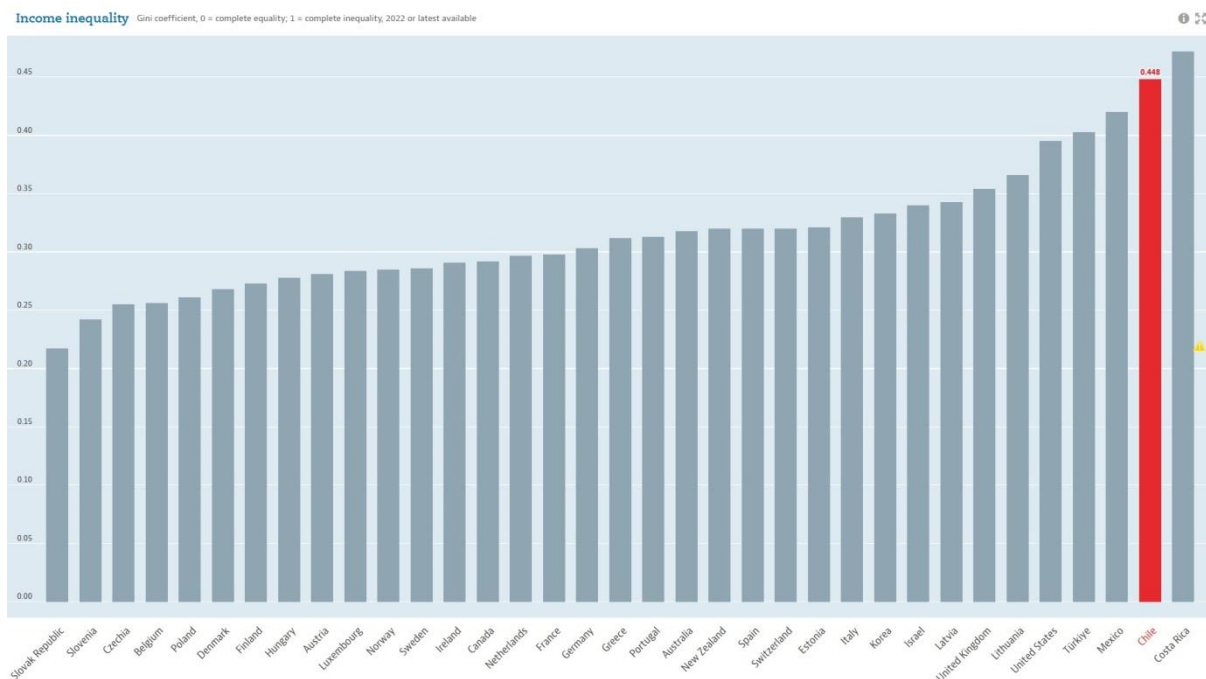
Principal demands of the protesters

Position	Demands	%
1.	Pensions	75,0
2.	Health	57,7
3.	Education	56,9
4.	Social justice	22,6
5.	New constitution	21,4
6.	Employment and fair wages	15,9
7.	Human rights and no to impunity	10,2
8.	Others	6,6
9.	Natural resources and the environment	6,2
10.	Rejection of the government and the political class	6,0
11.	Democracy, participation and organization	5,1
12.	Child protection and no more SENAME (child protection state agency)	4,9
13.	Corruption and exploitation	4,0
14.	Feminist, gender and dissident demands	3,7
15.	Against neoliberalism	2,6
16.	State transformation	2,0
17.	Housing and the city	2,0
18.	Quality of life	1,8
19.	Transport	1,8
20.	Indigenous people	1,5

Source: Author, based on NUDESOC, [2020].

The large number of different demands suggests that the increase in transport fares could not be the only reason for such massive protests. According to Garcés [2020, p. 12–13], thinking about the deeper causes moves on two levels: a) The structural inequalities of Chilean society have reached a point where they are no longer bearable; b) Similar cases of price increases accumulated (electricity, transport, medicines, basic foodstuffs,...) and society “exploded”. It is precisely in connection with the first point that the debate on the new constitution, which has featured with varying degrees of intensity in public speeches since the 2009 presidential campaign, has revived again.

Indeed, Chile as a country struggles with large social inequalities and regularly ranks at the top of the income inequality rankings within OECD countries. According to current data, only Costa Rica is worse off. In this context, changing the constitution could also represent one of the opportunities to change the structural composition of society and possibly reduce social inequalities.



Graph 1. Income inequality within OECD countries – Gini coefficient

Source: OECD Data, Income inequality, 06.05.2024.

The way out of the social crisis was eventually the initiative of some politicians and the signing of the Agreement for Social Peace and a New Constitution (*Acuerdo Por la Paz Social y la Nueva Constitución*), by which they undertook to organize a referendum and let the citizens decide whether the time had come to review the fundamental law of the state. Also due to the COVID-19 pandemic, the referendum did not take place until a year later, on 25 October 2020. The result was clear, with around four out of five Chileans in favour of the need for a new constitution.

3. DRAFT CONSTITUTION 2022

In 2020, 78 % of Chileans voted in favour of a new constitution. Such consensus can be described as broad and unequivocal. A Constitutional Convention with elected members (*Convención Constitucional*) has been designated as the political body in charge of drafting it. In a separate election, the citizens chose 155 representatives and, according to a special method, the seats were distributed so that the resulting order was 78 men and 77 women. Seventeen seats were allocated in advance to the indigenous population.

In 2022, almost three years after the outbreak of mass protests, the draft constitution was finally ready. However, it was quite clearly rejected in the subsequent referendum, when almost 62 % of citizens voted against it. The call for

a new constitution was thus quickly replaced by opposition to the final draft. Why? Here are a few reasons.

The composition of the Constitutional Convention was not representative and did not reflect the ideological distribution of society that can be observed, for example, in presidential elections. It is logical that in the attempt to replace the 1980 Constitution, it was its greatest opponents who were able to mobilize. The result, therefore, was that as many as two-thirds of all members could be ideologically classified as belonging to the left part of the political spectrum. [Fábrega, 2022] Their ideological opponents were thus left without the possibility of a veto.

On the points of contention, the very first article defines Chile as a multinational state. This means recognizing the autonomy of the eleven tribes of the indigenous population, whose languages become the official languages of the state, acquiring the right to self-government or even their own judicial system. The situation with the indigenous population has been tense for a long time, and in some regions the army often has to intervene. According to a survey by the University of Alberto Hurtado [UAH, 2022], it was precisely multinationality and security concerns that proved to be the factors that weighed most heavily in rejecting the proposal.

The second article argues that democracy in Chile is inclusive and parity-based. Women are to occupy at least half of the seats on the governing bodies of public enterprises. According to the same survey, there is a consensus among “Reject” voters against the demand for gender parity in public office.

In general, the state becomes the guarantor of a large number of civil and social rights. Free education, a state-funded health system or a solidarity-based social insurance system are complemented by free legal advice, the right to a nutritionally complete diet, the internet, energy, the security of digital space and many others. It is a challenge to imagine the complexity of the state apparatus and the mechanisms by which the state would fulfil these constitutional rights of its citizens. Concerns that the state would be in danger of collapse under the pressure of huge expenditures were therefore justified.

It is evident that this draft constitution, given the balance of power in the convention, was ideologically loaded. From a conservative constitution inspired by the laissez-faire economic doctrine, we have moved to the opposite side of the political spectrum. This time, a progressivist constitution inspired by feminism, support for minorities and a strong welfare state was on the table. It was too abrupt a shift that bypassed the political center and did not win the support of the majority of society.

Politicians refused to label the episode a failed experiment and the constitution-making process continued. The call for constitutional change remained strong. As many as 44 % of citizens at the time supported the start of a new constitution-making project, while 43 % preferred to reform the current constitution. Only 13 % were against any changes [UAH, 2022].

4. DRAFT CONSTITUTION 2023

Congress supported the idea of continuing the process and came up with the *Acuerdo por Chile* agreement, which set new rules. There were 12 basic points that any final proposal had to respect. These included, for example, that Chile was a social, democratic and rule of law state. Or that the indigenous population is part of the Chilean nation, which is one and indivisible. It also defined national symbols, the separation of powers and fundamental rights and freedoms.

Three bodies have been created for the purpose of the process. The first, the *Comisión Experta*, was composed of 24 experts (mostly with a legal background) elected by Congress. Their task was to produce a preliminary draft that would serve as a basis for the final version. The second, the *Consejo Constitucional*, included 50 members elected by the citizens themselves. This body was responsible for discussing and approving the final draft. The third, the *Comité Técnico de Admisibilidad*, ensured that all content proposals were in accordance with the predefined 12 basic points [Acuerdo por Chile, 2022].

However, a different approach produced the same result. The draft constitution was rejected in a referendum at the end of 2023, when 56 % of citizens voted against it.

Let us look again at the composition of respective constitutional bodies. Among the experts in *Comisión Experta*, the right-wing candidates won 12 seats, while the left-wing coalition won 10. The remaining two seats were taken by centrist candidates. In the *Consejo Constitucional*, the difference was more pronounced, as the right had two-thirds of the votes. The balance of power was thus reversed from the first process in favour of the right. The right did not hesitate to take advantage of its superior strength, as evidenced by the fact that only 22 % of the experts' preliminary draft was retained in the final version [Decide Chile, 2023b].

The final draft defines Chile as a welfare state, but at the same time maintains the important role of the private sector in areas such as health, education and pensions. It favours a mixed system in the provision of these services. An example is the creation of a universal health plan, which is provided by public and private institutions. This is similar to the case of pensions, where the state guarantees

certain basic benefits through public or private institutions. To a large extent, this also preserves the principle of the subsidiary state, although this is not explicitly named in the proposal.

The proposal also puts more emphasis on the protection of life. There was a threat that the right to abortion (currently only possible in three specifically defined cases), in force since 2017, would be extinguished as a result of non-compliance with the Constitution. The inclusion of conscientious objection in the constitutional proposal is also a novelty.

In terms of security, the state becomes the guarantor of effective protection against delinquency, with special emphasis on terrorism and organized forms of violence. Border police are established and deportation is required in the shortest possible time for those who have entered the country illegally.

As for equality between men and women in publicly elected positions, the proposal prescribes a parity approach to candidacy for these positions. Parity is therefore a criterion for entering the electoral process rather than exiting it. According to one of the transitional provisions, an adjustment in the allocation of seats will only take place if one of the sexes exceeds 60 % of the elected candidates in the next two congressional elections.

Less emphasis on feminist issues, restrictions on abortion policy or a different understanding of parity in public office probably contributed to the fact that this draft constitution was rejected more by women than men, especially in the under-34 age group. [Decide Chile, 2023a].

Compared to the previous draft, this one was contrasting. It significantly reduced constitutional guarantees from the state and promoted a vision of a society in which the private sector plays an important role in the provision of public services. It was less oriented towards minorities and indigenous population. It did not impose major changes in the functioning of state bodies and in many respects resembled more an attempt to update the still valid constitution.

5. THE CHILEAN PARADOX

At the beginning of the 2019–2023 constitution-making process in Chile, the 1980 constitution was in force, against which there was demonstrable public opposition. The imaginary pendulum shifted in the first phase to a left-progressive proposal that did not represent the views of the majority of society and was rejected. Subsequently, the pendulum swung even more strongly back towards right-wing conservatism, but again this did not satisfy the majority of society. Thus, more than

four years after the outbreak of the protests, and with two drafts having been drawn up, the same constitution that was vigorously opposed at the outset remains in force.

The pendulum effect described above brings us to a paradoxical observation – the originally criticized legacy of the dictatorship in the form of the 1980 Constitution has become more acceptable virtually without any change. Two failed referendums have stabilized the status quo for a long time as far as the most basic principles of the functioning of the state are concerned. Paradoxically, the call for a change in the constitution has made it even stronger. Moreover, the protesting groups have largely lost the legitimacy to call for radical changes, as they have not seized their opportunities. We call such a result the Chilean paradox.

One possible explanation is the change of the voting system from voluntary to compulsory during the ongoing constitution-making process. While the referendum on the new constitution in October 2020 and the elections for the first constitutional convention in 2021 were conducted on the basis of voluntary participation, the ratification referendum on the first draft and all other votes in the process already required compulsory participation. This meant more than 3 million new voters who had not participated at all in previous votes. These voters are overwhelmingly from the lower socio-economic strata, do not identify with political parties or on the left-right axis, generally distrust institutions and are not interested in politics. [González, 2023] Naturally, uninformed voters with an aversion to politics are more likely to reject its outcomes and to succumb to the aggressive anti-campaigning that accompanied the votes on both drafts.

The second view is that the constitution-making process and its results are merely a reflection of the gap between the political elite and ordinary citizens. Based on data from the 2017 presidential election, 55 % of the population could be classified as being in the middle of the political spectrum. This figure rose to 66 % in the 2021 presidential election, i.e. two years after the protests broke out and during the first phase of the constitution-making process. The data suggest that the electorate has been converging towards the political center in recent years [LEAS, 2022]. However, the same cannot be said about their representatives, who have produced two overly ideologically laden draft constitutions, highlighting their mutual contradictions. While citizens held moderate positions, the political elite refused to leave their ideological trenches at the edges of the political spectrum. In this context, the rejection of both drafts is an expression of the discrepancies between the representatives and the represented.

CONCLUSION

The constitutional process in Chile was supposed to heal the wounds caused by the wave of social unrest and calm society, but it has become just another arena for political struggle and ideological rivalry. Both draft constitutions went too far to the edges of the political spectrum and were rejected by the citizens, even though the new constitution was one of the demands of the protesters. It is important to emphasize that we focused primarily on the points that were problematic in both drafts, but this does not exclude the existence of points that people accepted and identified with.

The constitution is the fundamental law of the state on which there should be broad agreement. However, some passages in both drafts were more reminiscent of party political agendas. To a large extent, this was due to the unrepresentative composition of the constitutional bodies, in which comfortable majorities were able to impose their own visions of how society should function without taking into account the views of minorities. Attempts at dialogue and understanding were defeated by simple power mathematics.

The dynamics of the whole process were also affected by the introduction of compulsory voting, which brought more than 3 million new members into the system with minimal interest in politics and often with an inherent resentment of the political class. This has only accentuated the gap between ordinary citizens and the political elite, whose views on political outcomes in many cases diverge.

The original constitution, which is perhaps the biggest winner of the whole process, remains in force. The controversial nature of both proposals has meant that the constitution that was initially opposed has become more acceptable, virtually without any change. We have called this result the Chilean paradox.

In conclusion, the only broad consensus seems to be, at least for now, that the constitution-making process will not continue. However, the challenges facing the country remain the same as before the protests broke out.

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ARTIFICIAL INTELLIGENCE IN THE PROTECTION OF INTANGIBLE CULTURAL HERITAGE

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Abstract

This article examines the integration of artificial intelligence (AI) into the management of intangible cultural heritage (ICH), with a focus on how AI and big data can enhance cross-cultural communication and the preservation of "living knowledge." Through a case study in Georgia, the article highlights the critical need for ongoing staff training in AI technologies to effectively manage ICH. Quantitative data reveal significant gaps in digital competencies among cultural heritage professionals, which create barriers to AI adoption. The study also emphasizes the need to adapt cultural policies in the digital era to ensure the sustainable preservation and transmission of ICH. By advocating for data-driven strategies, this paper offers actionable insights for improving cultural heritage management and policy frameworks, providing guidance for cultural institutions worldwide.

Key words: Cultural Policy, Technological Transformation in Cultural Heritage, AI Integration in Intangible Cultural Heritage, ICH Management, Georgia.

INTRODUCTION

On March 13, 2024, the European Parliament approved the Artificial Intelligence Act (European Parliament, 2024), a landmark regulatory framework that underscores AI's transformative potential across various sectors, including cultural heritage. This legislation, finalized with member states in December 2023,

highlights the growing importance of AI in addressing challenges and opportunities in managing intangible cultural heritage (ICH).

The Convention for the Safeguarding of the Intangible Cultural Heritage, adopted by the UNESCO General Conference in 2003 and entering into force in 2006, remains the cornerstone of global efforts to protect and promote intangible cultural practices. This treaty emphasizes the preservation of “living knowledge” – the traditions, expressions, and practices passed through generations that embody cultural diversity and identity (UNESCO, 2003).

At the nexus of these developments lies the intersection of AI technologies and “living knowledge”, reflecting the evolution of cultural policies in the digital era. AI presents unique opportunities to analyze, interpret, and engage with cultural heritage, enabling the digitization of oral traditions, the creation of immersive experiences, and the revitalization of practices for future generations. However, the successful integration of AI in ICH management requires not only advanced technological capabilities but also robust institutional support and resource allocation.

In Georgia, where intangible cultural heritage forms a vital part of the nation's identity, the readiness of cultural institutions to adopt AI technologies is a pressing concern. Institutional and resource-based barriers—such as limited access to technology, inadequate technical infrastructure, and gaps in staff training—hinder the effective digitization and sustainable management of ICH. Addressing these challenges necessitates a comprehensive approach that includes interdisciplinary research, policy development, and strategic investments in technology and human resources.

This study investigates the institutional and resource-based barriers that affect the readiness of Georgian cultural heritage institutions to integrate AI technologies. It also explores strategies for overcoming these challenges to ensure the sustainable digitization and effective management of intangible cultural heritage, thus preserving its richness while embracing the opportunities of the digital age. Using interdisciplinary research, this study analyzes institutional challenges and proposes strategic solutions for integrating AI in Georgian ICH management.

1. LITERATURE REVIEW

The digitization of intangible cultural heritage (ICH) has emerged as a significant focus in cultural heritage studies, with researchers identifying numerous challenges and opportunities in this field. Key discussions in the literature address gaps in

digital competencies, standardization, technological integration, ethical considerations, collaborative frameworks, and the potential for artificial intelligence (AI) to drive innovative solutions.

Digital Competencies and Training

Studies highlight the lack of adequate digital skills among cultural heritage professionals as a barrier to effective ICH management. Das, Maringanti, and Dash emphasize the importance of capacity-building programs tailored to the unique demands of digitization, including the use of emerging technologies like AI and big data analytics (Das, B. R., Maringanti, H. B., & Dash, N. S., 2022). This aligns with broader calls for professional development to equip staff with the necessary competencies for digital transformation in cultural institutions. However, newer studies, such as those by Harisanty, D. and Retrialisca, F., suggest that digital skill-building must also address immersive technologies like virtual reality (VR) and augmented reality (AR) to preserve and showcase cultural traditions effectively. These insights resonate strongly with the need for tailored professional development in Georgia, where gaps in digital competencies are a known barrier to AI integration.

While capacity-building programs have been advocated to bridge these digital skill gaps, there is an emerging need for training that specifically integrates the use of AI in ICH management. AI has the potential to revolutionize how cultural heritage is preserved and promoted, from automating the cataloging process to enhancing accessibility through advanced data analytics. Yet, despite the promise of AI, many cultural heritage professionals still lack the specific skills required to utilize these technologies effectively. This underscores a significant gap in both training programs and institutional readiness to integrate AI into digitization efforts.

Standardization and Interoperability

The need for unified cataloging standards in the management of intangible cultural heritage (ICH) is a central concern in recent literature. As highlighted by Zoannos, Chourdaki, and Assimakopoulos, inconsistent cataloging procedures, metadata models, and data storage methods across different countries create significant barriers to global interoperability and the long-term preservation of ICH (Zoannos, N., Chourdaki, P., & Assimakopoulos, N., 2023). These variations in cataloging practices hinder the seamless sharing and accessibility of cultural heritage across borders, underscoring the urgent need for standardized approaches, particularly in light of global uncertainties and technological risks. Their work advocates for the development of a clear, internationally recognized process, such

as the one outlined by UNESCO, to unify digitization practices and ensure that ICH is preserved and accessible for future generations.

Further complicating this issue, Lian and Xie emphasize the growing importance of digital technologies, such as virtual reality (VR) and augmented reality (AR), in enhancing cultural heritage experiences and expanding public engagement (Lian, Y., & Xie, J., 2024). Despite the significant progress in digital cultural heritage (DCH) research, they identify the need for systematic assessment methods and standardized frameworks to guide the implementation of these technologies. Their research also points to the potential of linked data and semantic web technologies to improve the discoverability and contextualization of ICH. This strategy could foster international collaboration and the development of digital archives and databases, addressing the fragmentation in cataloging standards and improving global access to ICH.

In Georgia, where digital cultural heritage systems are still evolving, the adoption of such international frameworks could significantly accelerate the digitization process and improve the integration of Georgian ICH into global platforms. This underscores the pressing need for unified cataloging standards that facilitate interoperability, ensure efficient integration of ICH records into global digital platforms, and contribute to the long-term preservation and global accessibility of ICH.

While digital technologies, including AI, VR, and AR, hold immense promise for enhancing the preservation and promotion of ICH, a critical gap remains in the ability to apply these technologies in a standardized and interoperable manner. Current efforts to digitize ICH are often fragmented, with differing cataloging practices and metadata standards hindering cross-border access and collaboration. This literature reveals a clear need for comprehensive frameworks that not only address the training and skill gaps among cultural heritage professionals but also establish standardized protocols for digitization and data storage that can be adopted internationally. As AI technologies continue to emerge, it is essential that training programs in cultural heritage institutions evolve to include AI literacy and the specific tools necessary for its implementation in heritage management. This need is particularly urgent in Georgia, where the integration of AI and big data into the digitization of ICH is still in its early stages. Therefore, the literature reviewed not only highlights the current barriers but also stresses the importance of moving towards a more integrated and standardized approach to digitization that includes emerging technologies like AI.

Technological Integration

The application of artificial intelligence (AI) and big data in the management of intangible cultural heritage (ICH) presents a transformative opportunity for both preservation and engagement. Giannini, E., & Makri, E. (2023) explore the potential of AI in automating cataloging processes, creating interactive cultural experiences, and enhancing the accessibility of ICH to global audiences. However, they caution against an over-reliance on technology, emphasizing the need for human oversight to ensure the preservation of cultural authenticity. This perspective highlights the challenge of balancing technological innovation with the safeguarding of cultural values.

Complementing this, Liu and Song discuss the use of AI-enhanced storytelling, particularly through generative AI tools that reconstruct and animate oral traditions (Liu, H., & Fan, J., 2024). These innovations broaden the engagement of younger audiences while preserving the essence of cultural practices. In the context of Georgia, these technologies offer significant potential for documenting and revitalizing endangered oral traditions, an area where resource constraints and limited technical infrastructure currently pose substantial challenges. The use of AI in this area could help bridge these gaps, enabling more effective documentation and preservation of cultural heritage that is at risk of being lost.

Ethical and Legal Challenges

Ethical concerns play a central role in discussions regarding the digitization of intangible cultural heritage (ICH). Clippele, M. S. highlights critical issues such as privacy, intellectual property rights, and the risk of cultural appropriation in digital contexts (Clippele, M. S., 2023). These challenges underscore the need for careful consideration of the ethical implications of digitizing cultural heritage. In addition, the UNESCO Guidelines for Safeguarding Intangible Cultural Heritage (2020) stress the importance of establishing ethical frameworks that balance the benefits of digitization with respect for cultural traditions and community rights.

Expanding on this, Sonuç, N., & Sürer, S. argue for the implementation of community-led protocols in digitization efforts, ensuring that local stakeholders retain control over how their heritage is represented and shared in digital formats (Sonuç, N., & Sürer, S., 2023). This approach is especially pertinent in the context of Georgia, where engaging local communities in digital heritage projects could significantly enhance cultural authenticity and help address concerns about cultural appropriation. By prioritizing community involvement, Georgia can ensure that the digitization process is both ethically sound and culturally respectful.

Collaborative and Multilateral Approaches

Successful digitization initiatives often depend on collaborative efforts among various stakeholders. Park, S., & Kudo, H. explore this dynamic in their research on the role of cultural organizations as knowledge-intensive public organizations (KIPOs) (Park, S., & Kudo, H., 2024). Their study, using a country case study, highlights how digital content creation in museums and national strategies contributes to the development of digital services. The research underscores the growing importance of digital technologies in museums, not only for attracting new audiences but also for improving knowledge management and enhancing the reproduction of cultural knowledge. The authors argue that museums, as KIPOs, can leverage digital tools to create valuable digital content, which can be used for both public engagement and more efficient service delivery.

Building on this idea, Andrii, F. demonstrates how regional alliances in Eastern Europe have successfully pooled resources to digitize intangible cultural heritage (ICH) across borders (Andrii, F., 2023). This cooperation showcases the potential of scalable, cooperative models, particularly in resource-constrained contexts. For Georgia, fostering similar collaborations could play a crucial role in overcoming institutional and resource-based barriers to digitization, while also benefiting from the expertise of international partners in preserving and sharing ICH.

Role of Digital Museums and Archival Systems

Emerging literature highlights the role of digital museums and archival digitization in facilitating access to ICH. Georgia's efforts in establishing digital museums, as outlined in national policy reports (Georgian Ministry of Culture, 2023), serve as an example of early-stage adoption of technology in ICH management. While these initiatives remain limited in scope, they highlight the importance of foundational work in digitization for broader AI integration (Lupo, E., & Rubino, F., 2023). Digital for heritage and museums: design-driven changes and challenges underscores the importance of scalable archival digitization as a prerequisite for advanced AI applications in cultural heritage. Establishing robust archival frameworks in Georgia would provide a strong foundation for implementing AI-driven solutions.

AI-Driven Innovations in ICH Preservation

Recent studies shed light on the potential of AI tools to overcome institutional and resource constraints. Gîrbacia, F. explores the use of AI-driven predictive models to identify at-risk cultural traditions, enabling preemptive documentation and preservation (Gîrbacia, F., 2024). Similarly, case studies from AI-supported immersive storytelling projects demonstrate how machine learning can create

virtual environments where users can interact with cultural practices, enhancing engagement and education (Ott, 2022). In Georgia, such AI-driven innovations could transform how ICH is documented and shared, ensuring its sustainability while.

2. USING ARTIFICIAL INTELLIGENCE FOR THE MANAGEMENT OF INTANGIBLE CULTURAL HERITAGE: ASSESSING STAFF PREPAREDNESS IN GEORGIA

Artificial Intelligence (AI) is revolutionizing the management and preservation of intangible cultural heritage (ICH), which includes oral traditions, performing arts, rituals, and other expressions deeply rooted in community identities. By leveraging AI technologies such as machine learning, natural language processing, and computer vision, institutions can enhance the documentation of ICH, transforming vast datasets—such as oral histories, artifact images, and performance videos—into comprehensive, durable digital records that safeguard these traditions for future generations. AI-driven tools like virtual reality (VR) and augmented reality (AR) expand accessibility and engagement by providing immersive cultural experiences, such as virtual tours and interactive reenactments, fostering broader appreciation and participation across diverse audiences. Dynamic educational frameworks, including adaptive learning platforms and 3D visualizations, preserve the experiential aspects of cultural practices, enabling users to actively engage with traditional crafts and ceremonies despite geographical or resource limitations. Furthermore, AI supports research by identifying patterns in folklore, analyzing historical data, and uncovering trends, enhancing interdisciplinary understanding of cultural evolution.

Despite its transformative potential, integrating AI into ICH management requires addressing ethical and cultural sensitivities, such as respectful representation of traditions and safeguarding intellectual property rights. Collaboration with local communities is essential to ensure that AI tools align with cultural values. While emerging technologies like generative AI and advanced analytics offer innovative approaches for ICH engagement, technical limitations persist. For instance, models like Structure from Motion (SfM - is a photogrammetric technique used to create 3D models from 2D images.) offer visualization but lack the precision of Laser Scanning (LiDAR) for archival purposes (Barszcz, 2021). Experimental Museology (Kenderdine, 2021) refers to an interdisciplinary approach to museology that integrates emerging technologies with the traditional study and presentation of cultural heritage. In the context of ICH, experimental museology explores innovative

ways to digitally preserve, interact with, and engage communities around cultural traditions, performances, and practices that are often not represented in physical museum collections. This approach often includes tools like AI, VR, and AR to create immersive experiences and digital archives, encouraging active participation and co-creation by the public. By combining traditional cultural knowledge with digital technologies, experimental museology enables a more dynamic, evolving preservation model that goes beyond static exhibits, fostering a deeper connection to living, intangible cultural heritage.

In Georgia, efforts to digitize ICH are at an early stage, focusing on the digitization of archival data and the development of digital museums. The establishment of a digital museum marks a significant milestone, providing an interactive platform for showcasing and preserving Georgia's cultural heritage. These initiatives serve as centralized repositories for cultural artifacts, traditions, and oral histories, offering broader public access and laying the foundation for advanced AI applications. Although AI is not yet widely implemented in Georgia's cultural heritage sector, these digitization efforts are critical first steps toward harnessing AI technologies for tasks such as automated classification, virtual reconstructions of cultural artifacts or sites, and AI-driven interactive educational programs.

Looking ahead, Georgia's integration of AI into ICH management will depend on addressing existing institutional and technological challenges, fostering collaboration among stakeholders, and building on these foundational projects. By leveraging AI in conjunction with virtual tools like serious games (SGs – Games designed for educational or informative purposes, often with cultural or heritage themes), mixed reality (MR - A blend of physical and virtual worlds that allows for immersive, interactive experiences, combining aspects of both AR and VR) and accessibility-focused initiatives, Georgia can ensure the sustainable preservation and dynamic engagement of its intangible cultural heritage for future generations.

2.1. CRITERIA FOR EVALUATING STAFF READINESS

Assessing the readiness of staff involved in managing intangible cultural heritage (ICH) to use artificial intelligence (AI) is crucial for effective integration. The following criteria are essential for evaluating this readiness:

Awareness and Education: Many staff members may not fully understand AI's capabilities and applications in ICH management. Offering targeted education and training programs can help improve their knowledge of how AI can enhance their work, increasing their willingness to adopt AI technologies.

Technical Skills: Implementing AI typically requires skills in areas such as data analysis, machine learning, and programming. Staff members may need to develop or refine these skills to effectively use AI tools and platforms in their roles, including proficiency in data processing, AI algorithms, and programming languages like Python or R.

Cultural Sensitivity: AI technologies must be applied with respect for cultural contexts and ethical considerations. Staff should be trained to ensure that AI applications uphold the diversity and integrity of ICH, avoiding biases and ensuring culturally sensitive representation.

Resource Availability: Effective AI implementation requires financial resources, technical infrastructure, and organizational support. Staff readiness is enhanced when these resources are available, and the organization demonstrates a commitment to supporting AI initiatives through both funding and infrastructure development.

Collaboration and Partnerships: Partnering with AI experts, technology vendors, and other cultural institutions can ease the adoption of AI in ICH management. Staff are more likely to embrace AI if they have access to external expertise and support, fostering an environment of collaboration.

Risk Management: Concerns about data privacy, security, and potential job displacement may affect staff willingness to use AI. Establishing clear guidelines, policies, and safeguards will mitigate these concerns, building staff confidence in utilizing AI technologies responsibly.

Staff readiness to adopt AI in ICH management depends on a combination of factors, including awareness, technical skills, cultural sensitivity, resource availability, collaboration, and risk management. Addressing these factors through education, training, support, and partnerships will enhance staff readiness and facilitate the successful integration of AI into ICH management practices.

2.2. RESEARCH SCOPE AND METHODOLOGY

This study evaluates the readiness of Georgia's Intangible Cultural Heritage (ICH) management system for integrating digital technologies. A quantitative survey was conducted to assess the preparedness of both staff and institutions in digitizing ICH and adapting to new technological tools in cultural heritage management.

The survey was administered to 1,074 respondents from various cultural heritage institutions across Georgia. These included key museums, research centers, and heritage protection agencies directly involved in ICH management.

The institutions participating in the survey were: National Museum of Georgia; Tbilisi Historical-Ethnographic Museum; Kutaisi State Historical Museum; Telavi Historical-Ethnographic Museum; National Agency for Protection of Cultural Heritage of Georgia; Cultural Heritage Protection and Research Center (A(A)IP); Institute of History and Ethnology of TSU.

These institutions were selected for their central role in preserving and managing Georgia's ICH, making them representative of the national heritage landscape.

The survey consisted of 12 questions designed to assess key aspects of staff preparedness for engaging with digital technologies in ICH management. The main focus areas were: Demographic Information (General data about respondents, including age, gender, and educational background); Digitization Experience (Prior experience with digitizing both tangible and intangible cultural heritage materials); Skills and Competencies (The knowledge and skills necessary for effective digitization of ICH, including familiarity with digital tools and techniques); Training and Education (The extent of education and training received in areas related to ICH digitization, museum technologies, and digital preservation strategies); Course Participation (Involvement in specialized courses or workshops on ICH digitization, as well as staff expectations for future training opportunities).

The survey responses were analyzed to assess the readiness of Georgia's ICH management system for digital transformation. The findings identified gaps in training and technological preparedness, suggesting areas that require further development and institutional support. These insights are intended to guide future initiatives aimed at improving staff capacity and institutional infrastructure for digitization.

Educational Background: 48 % of respondents hold a Master's degree, 50 % have a Bachelor's degree, 2 % possess a Doctoral degree.

Academic Disciplines: 32 % in Archaeology, 12 % in Social Sciences, 12 % in Tourism Management, 12 % in Art History, 8 % in History, 8 % in Ethnology, 8 % in Culture Management, 5 % in Museology, 3 % in IT Technologies.

Demographics: 72 % of respondents were women. 38 % of respondents were aged 50 or older, reflecting a relatively experienced workforce. 71 % of respondents with advanced degrees held a Master's degree, with the majority specializing in Archaeology.

These findings provide important insights into the educational and professional background of the personnel involved in ICH management, which is crucial for evaluating their readiness to engage with digital technologies. The data highlights

both the strengths in specialized knowledge and areas where further development in digital skills is needed.

2.3. RESEARCH ANALYSIS

The survey analysis provides an in-depth assessment of the current digital competencies, training levels, and preparedness of staff involved in the management and promotion of Georgia's intangible cultural heritage (ICH). The findings reveal both strengths in foundational skills and significant gaps in readiness to advance digitization efforts within the field.

Current Skill Levels and Digital Competencies. The survey responses highlighted varying levels of digital proficiency among respondents, categorized into basic and advanced skills.

Basic Competencies. A significant portion of participants demonstrated proficiency in basic digital skills, including: Operating office software, managing emails, and utilizing social media platforms.

Using basic tools such as cameras, drones, and video/photo editing software.

Advanced Digital Skills. A smaller subset of respondents reported more specialized digital skills. The most commonly noted advanced skills included: Digital Marketing (16.74 %): A strong focus on leveraging digital platforms to enhance ICH visibility. E-commerce (15.66 %): Competence in managing online sales and transactions, vital for monetizing cultural products. Product Management (15.32 %): The ability to organize and manage heritage offerings for digital dissemination. Digital Design (12.74 %): Skills in creating engaging content related to ICH. Content Management (11.29 %): Essential for curating and organizing digital heritage assets. Technical Guidance (10.95 %): Providing support for technical aspects of ICH management. Data Management/Analysis (9.10 %): Critical for analyzing trends and making informed decisions. Multimedia Production (9.83 %): Creating videos and interactive digital content. IP and Rights Management (6.18 %): Important for protecting cultural assets in the digital space. Electronic Communications (6.92 %) and Social Media (6.92 %): Demonstrating familiarity with modern communication tools to engage audiences.

Knowledge of National Guidelines. The survey also assessed respondents' awareness of national guidelines for cataloging, preserving, and presenting intangible cultural assets. The findings were as follows: 63 % of respondents were aware of such guidelines. 37 % lacked knowledge, suggesting a significant gap in information dissemination and staff education on institutional protocols.

Training and Education in ICH Digitization. The responses revealed considerable variability in training and educational experiences among respondents: 20 % of respondents had completed formal certification courses in digital preservation and ICH management. 16 % had received practical training on digitization equipment, including scanners, cameras, and relevant software. 14 % had participated in online learning platforms such as Coursera and edX. 13 % had received institutional training tailored to their organization's needs. 15 % had attended workshops and seminars focused on emerging trends and technologies. 12 % had gained experience through on-the-job training, though the depth and consistency of such training varied. 10 % engaged in self-directed learning, though lacking formal guidance.

Experience in Cataloging Intangible Assets. The survey revealed that: Only 8 % of respondents had direct experience with cataloging intangible assets. 92 % had no experience in this critical area, emphasizing an urgent need for targeted training and capacity-building programs in cataloging practices.

Implications for Future ICH Projects. The low percentage of staff with cataloging experience underscores the necessity for comprehensive professional development in Georgia's ICH management system. To address these challenges, several recommendations are proposed:

Expanding Training Opportunities: To address gaps in skills related to cataloging and advanced digitization techniques, training programs should be expanded and tailored to meet these specific needs. **Enhancing Awareness:** Efforts should be made to improve the dissemination of national guidelines and institutional protocols to ensure all staff members are well-informed and capable of adhering to best practices.

Strengthening Technical Skills: Focused training on multimedia production, data analysis, and intellectual property management is essential to equip staff with the technical skills required for modern ICH management. **Fostering Collaboration:** Encouraging partnerships with technology providers and other cultural institutions can help share resources and expertise, strengthening Georgia's capacity to digitize and promote its ICH.

By addressing these areas, Georgia's ICH management system can build a workforce capable of effectively leveraging digital tools to preserve and promote cultural heritage in the digital age.

2.4. RESULTS

The survey results highlight a promising foundation among staff involved in cultural heritage protection, with a strong emphasis on modern competencies such

as digital marketing and e-commerce, which are instrumental in promoting and managing intangible cultural heritage (ICH). These skills reflect a forward-looking approach to increasing the visibility and accessibility of ICH in a digital era.

While staff exhibit good awareness of the legal frameworks and possess basic digital tools, the findings reveal a notable gap in practical experience with cataloging intangible assets. Despite 63 % of respondents being familiar with cataloging guidelines, only 8 % have hands-on experience in this critical area, underscoring the need for targeted training and development.

The study identifies the integration of big data and artificial intelligence (AI) as transformative opportunities for managing and developing ICH. These technologies offer potential benefits, such as: **Enhanced Preservation and Accessibility:** AI-driven tools enable efficient cataloging, customization, and restoration of ICH, ensuring its global accessibility.

Innovative Promotion: Digital platforms allow for tailored communication and interactive experiences that broaden audience engagement. However, adopting such technologies must address ethical considerations, privacy concerns, and legal compliance to safeguard the integrity of ICH.

Cataloging Gaps: Despite awareness of guidelines, a lack of practical expertise in cataloging ICH objects presents a significant challenge.

Inconsistent Standards: Variability in cataloging methods across institutions and countries hinders global integration.

Training Needs: There is a clear need for comprehensive training programs to equip professionals with advanced digital skills, including multimedia production, data management, and intellectual property rights.

Alignment with Global Platforms: Adapting Georgian cultural institutions to platforms like EUROPEANA can improve access to and alignment with international standards, fostering cross-cultural exchange and collaboration.

Key Recommendations

Enhancing Digital Competencies. It is imperative to design and implement advanced training programs that focus on developing staff expertise in digital cataloging, artificial intelligence (AI) applications, and emerging technologies. These programs should incorporate both theoretical and practical components to ensure a well-rounded understanding of digital tools and their applications in intangible cultural heritage (ICH) management.

Developing Unified Cataloging Standards. The establishment of standardized guidelines for cataloging intangible assets is crucial to achieving consistency across institutions. Unified standards will facilitate interoperability between local and

international organizations, promoting the efficient integration of ICH records into global digital platforms.

Integrating Advanced Technologies. The integration of big data analytics and AI-driven tools into the preservation and promotion of ICH offers transformative possibilities. These technologies can optimize cataloging processes, enhance accessibility, and foster the creation of innovative cultural experiences, ensuring the dynamic dissemination of ICH in the digital era.

Fostering Multilateral Collaboration. A multi-stakeholder approach is essential for the successful implementation of digital heritage initiatives. Cultural institutions, technology providers, policymakers, and local communities must collaborate to ensure that digitization efforts are both effective and sustainable. Such partnerships can facilitate resource sharing, foster innovation, and promote the inclusivity of diverse cultural narratives.

Establishing Ethical and Legal Frameworks. Addressing the ethical and legal challenges associated with digitization is paramount. These frameworks should prioritize the protection of privacy and intellectual property while ensuring equitable access to digitized cultural heritage. The ethical use of emerging technologies must be monitored to safeguard the authenticity and integrity of ICH.

Evaluating Global and Local Implications. The digitization of ICH not only contributes to preserving cultural traditions but also enhances cross-cultural understanding and global engagement. This process has the potential to strengthen cultural identities, drive economic growth within creative industries, and facilitate international cultural exchange. Future research should explore the socioeconomic impacts of these efforts to refine strategies for cultural heritage management.

By addressing these priorities, the field can bridge existing gaps and harness digital innovations to preserve, promote, and share ICH effectively with global and local audiences, ensuring its sustainability for future generations.

CONCLUSION

In conclusion, this research uniquely examines the readiness of Georgian cultural heritage institutions to integrate artificial intelligence (AI) technologies for managing intangible cultural heritage (ICH). While the findings identify institutional and resource-based barriers—such as gaps in digital competencies, a lack of practical cataloging experience, and insufficient training programs—the study also proposes strategies for overcoming these challenges. These strategies focus on enhancing staff skills, developing standardized cataloging practices, and fostering collaborations with technology providers. The originality of this research lies in its exploration of

AI's potential to transform the digitization and preservation of ICH in Georgia, an area largely unexplored within the Georgian context.

However, a potential limitation of the research is its lack of broader international significance, particularly regarding how Georgia's ICH management compares to other countries adopting AI in heritage preservation. While the study provides valuable insights into the local context, future research could broaden this perspective to include a comparative analysis with other nations, thus enhancing the global relevance of the findings.

Furthermore, the adoption of AI in cultural heritage management must also consider legal frameworks, such as the Artificial Intelligence Act proposed by the European Parliament in 2024. This regulation aims to provide a comprehensive approach to managing AI technologies, ensuring their ethical and legal use across EU member states. Integrating these regulations into the context of ICH management would be crucial for Georgia as it moves towards digitization, helping to address concerns about the ethical implications, data protection, and intellectual property rights surrounding AI technologies.

Future research could further explore the intersection of AI technologies and international policy frameworks, specifically focusing on the ethical and legal implications of digitizing cultural heritage through AI. This would not only address the evolving legal landscape but also ensure that Georgia's ICH management aligns with global standards and best practices in digital heritage preservation.

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